



Community Bank Windsor Community Partnership Program Guidelines

For over 20 years, the Community Bank Windsor has contributed almost \$2million back into Community projects and supported over 100 Community groups. We support people working to make our Community a better place to live, work, play and grow via our 'Community Bank' model.

The Community Bank model mandates that at least 50% of our profits are contributed back to our community via grants and sponsorships. Our Partnership Program relies on local banking business to generate profits to fund community organisations and projects. It is only by growing our banking business that we can continue to increase the amount of community funding we provide.

Our Partnership Program is administered by the Community Enterprise Foundation (CEF) and made possible by the generous support of our Community Bank Windsor customers.

Partnership Program Aims

- Develop reciprocal partnerships between Community Bank Windsor and the broader community
- Enhance social capital and Community capacity
- Establish strong community networks and a culture of mutual support within a healthy and vibrant local Community
- Promote the Community Bank as the centre of a dynamic, progressive and prosperous Community

Eligibility Criteria

- Clear benefits to, and valuable impact on our local Community namely:
Windsor, Prahran, South Yarra, St Kilda, St Kilda East, St Kilda West, Balaclava, Toorak, Albert Park, Middle Park, Port Melbourne and Fisherman's Bend
- Partnerships are prioritised for organisations who are located in, and/or predominately service in the above suburbs
- The granted activity, event or project must align with Bendigo Bank's corporate image and identity as a community-based organisation
- Organisations must be in a sound financial position and provide copies of annual report including financials
- Community Partnership with reciprocal benefits.

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Inappropriate Partnerships

The following are regarded as inappropriate or not charitable by tax office or law and therefore are not eligible to receive funding via our Community Partnership Program:

- Political organisations
- Events or programs that denigrate, exclude or offend
- Events that encourage gambling or substance abuse
- Events that create environmental hazards or may present a hazard to the community
- Programs that do not reflect community standards
- Programs sponsored by competitors
- Organisations that have private benefits for members
- Activities that are only sporting, social or recreational
- Illegal activities
- Projects that create a commercial return
- Government projects or entities
- Funding to repay costs already incurred
- Projects that don't (*broadly*) benefit the community

Conditions of Partnerships

It is expected that all approved partnerships will be:

- Used for a project that will be completed within 12 months of approval unless otherwise agreed
- Used for the purposes of the project / event detailed in the original application unless written approval is obtained from the Board prior to any variation
- Returned to Community Bank Windsor if the project / event does not proceed

We will only accept applications up to \$5,000 (exclusive of GST).

Government / Schools

Charity Law in Australia clearly outlines that charitable money cannot be used to fund projects or activities that are the government's responsibility. Charities should not have to make up the shortfall of what is government's policy delivery. To ensure against this, the law prevents charitable grant-makers from paying entities with a government ABN.

Community groups, like recreation reserves and community hall committees may operate under government ABNs. On their own, these entities are not eligible for charitable funding however they can apply using a Project Partner. The same applies to public schools who operate under a government ABN.

Community Bank Windsor
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Project Partner

A Project Partner is an organisation who is eligible to receive charitable funding and that is also willing to work with the group to deliver your project. A Project Partner can:

- Receive the funds, and
- Help to deliver the project (through labour or expertise or other forms of support)
- The partner should be able to confirm that they:
 - Support your project
 - Are willing to receive the funds and commit to pass them on to complete your project
 - Will help in some way to deliver the project beyond simply passing on the funds

Sporting, Social or Recreational Activities

While sport in general is listed as not meeting charitable requirements, there are many instances where sports can be deemed eligible. Whilst the equipment or facilities that can only be used for sport are not charitable, the other aspects of a sports club – such as pavilions / rooms / storage sheds that are also used by other, non-sporting groups in the community are often considered to deliver charitable benefits to the community. Therefore, sports groups can apply for funding to support projects that go beyond the sport itself.

As sport can connect people in the community – where it delivers social outcomes or helps to interconnect those who may be otherwise socially isolated, sporting activity can be considered charitable. For example, if the sporting project is to run a program for the disadvantaged, disabled or cultural minorities it is likely to be considered charitable and eligible for funding. Funding for equipment for these groups is also charitable.

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Community Partner Mutual Benefits

A partnership with the Community Bank Windsor creates many opportunities for reciprocal benefits through our preferential banking services and access to our network of Community Partners and local businesses.

Following a successful application, we will meet with you to discuss how we can all benefit from our partnership.

As a minimum, support and promotion of our partnership may be as follows:

- All approved partnered organisations must maintain a bank account with the Community Bank Windsor to receive funds
- Our bank manager and staff are pleased to offer your organisation, members and stakeholders personal and preferential service
- Display our logo and name physically and or digitally as appropriate
- Invite our branch manager or directors to speak at event where appropriate
- Social media / newsletter announcements
- Display of bank promotional material at event or venue
- Keep in regular contact with our Community Liaison Officer regarding your project
- Meet with our Community Liaison Officer and Branch manager to discuss how we can both benefit from our partnership.

As part of our community, the Community Bank Windsor staff and directors are delighted to welcome to offer you the following:

- Exceptional and competitive banking services to your organisation, board, members and families
- Promotion of your community group event / activity, project etc on our social media and to our wider Bendigo Bank network
- Access to our referral program. From home loans to everyday bank accounts, we reward community groups who refer banking business to our Community Bank
- Invitations to attend our exclusive Community Bank events
- Access to a network of like-minded community groups, local small businesses and a wealth of information and contacts within our community for your every need

The specific details of the mutual obligations of all successful applications will be negotiated and documented in a Partnership Agreement.

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When to Apply for our Community Partnership Program

Applications for this program close on Friday 29th September.

Supporting documentation

All applications will need to include the following documentation to be submitted.

1. Financials

- Current signed Audited Financial Statements for the Applicant Organisation and Project Partner (where applicable)
- If your organisation is not required to audit your financials, please provide a profit and loss statement as a minimum and a balance sheet if available. Please also include a current bank statement.

2. Quotes

- Quotes are required for all budget items
- If you have conducted this project / program before copies of receipts / invoices that substantiate this request from previous expenditure may be acceptable together with a detailed budget

3. Project Budget

Please ensure that your budget and/or supporting documentation clearly shows how the funds requested will be spent. Don't forget to include your contribution to the project and any in-kind support in your budget.

Treatment of Confidential Information

Information provided by applicants and the Committee's assessment of each application will be maintained on a confidential database which may be made available to auditors, Bendigo Bank, or other authorised entity to ensure transparency and accountability to the shareholders of our Community Bank.

More Information or Help

For assistance with your application or queries about the program, please contact our Community Liaison Officer, Lee on 0403 232 003 or at windsor.partnerships@gmail.com.

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Application Process

Follow the link to Community Enterprise Foundation Community Investment Application System - here:

https://bit.ly/Community_Bank_Windsor_Partnership_Application

1. Click on the 'Apply to Community Bank Windsor Grant Program' button

Community Enterprise Foundation

Funding Application

How to Apply for Grant Funding

Is your organisation in need of funds for a Community project? The Foundation facilitates a wide range of grants for eligible charities and not-for-profit organisations in Australia.

The Foundation works closely with Community Bank and Corporate partners that choose to reinvest their profits back into their local communities via a structured charitable grant programs.

Before commencing your application view the application check list [here](#) To learn more about the Grant Application process [click here](#)


If you have previously started the grant application process, please [log in here](#) using your registered username and password. This will allow you to continue working on your saved application.

A list of frequently asked questions are available if you have any questions or concerns. [Click here to view FAQs](#)

If you have previously received a grant and require assistance to complete your online Project Completion Report [click here](#).

For additional assistance in submitting your application call 1300 304 541.

Year Search program title, suburb, town, city or postcode

 **2023 Community Bank Windsor Grant Program VIC Round 2**
Open for applications from **Monday, 21 August 2023** until **Friday, 29 September 2023**

[Show Program Details](#) [Apply from Monday, 21 August 2023](#)

2. A confirmation email will be sent to the registered email address once application has been submitted.
3. Supporting Documentation Checklist
 - Financial statements (audited if available)
 - Project partner financial statements – if applicable (audited if available)
 - Project quotes
 - Any other relevant information (eg. annual reports, promotional materials, letters of support)
 - Copy of letter of support from project partner (if applicable)

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 **Bendigo Bank**

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