

# Community Bank Warrandyte

## 2023 Community Investment Program

An opportunity to do great things in our local community.



**Community Bank Warrandyte**

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## Community Bank Warrandyte

Warrandyte Community Financial Services (WCFS) is the local company supported by Bendigo Bank that operates Community Bank Warrandyte.

Our purpose is to provide our customers with award winning financial products and services, delivered by our franchise partner, Bendigo Bank and to return profits to our local communities. Our staff and board are committed to the well being and prosperity of our community and to having a significant impact. Each year we give up to 80% of our profit to local projects through grants, sponsorships and donations.

## Community Bank Model

This model is dependent on our local families and businesses using Community Bank Warrandyte for banking and financial products and services. It's one of the worlds largest social enterprise style businesses and the more local people choose Bendigo Bank in Warrandyte, the more impact we can have.



## Community Partnership

What is important to us and helps the community to prosper?

- strong, vibrant community groups and organisations that are engaged with their members
- community groups with a wide cross-section of families and individuals
- advocates to promote our business – often the best voice for sharing our message is your voice
- opportunities to share our message about the benefits of community banking with your members by speaking at events or meeting your members, we can do more together!

customers = growth = greater investment in our community

## Community Investment Program

The funding program occurs in July/August each year and is open to not-for-profit community groups and organisations who are keen to partner with us to deliver projects that provide broad community benefit. Funding is delivered as either a grant or sponsorship.

## Application Conditions

This checklist provides handy information that will help you understand the eligibility criteria.



The project must benefit the community served by Community Bank Warrandyte.



A Community Bank Warrandyte account is a pre-requisite for funding.



Organisations, clubs or community groups that apply must be incorporated either as an association or a company; should have an ABN; and must be able to demonstrate fiscal responsibility.



WCFS is the sole financial institution providing sponsorship funding to the project:

- It is a condition of our approval that the organisation will not enter into sponsorship arrangements directly with or involving competitors of WCFS (for example other Banks, Financiers or Finance Brokers) during the term of the sponsorship arrangement with WCFS, without prior agreement from WCFS. If the sponsored organisation enters into an arrangement directly with or involving competitors of WCFS during the term of the WCFS sponsorship, WCFS reserves its right to recover the sponsorship amount.
- WCFS will not invest in organisations that have sponsorship arrangements with competitors (for example other Banks, Financiers or Finance Brokers).
- If the organisation experiences a change in its Committee of Management, WCFS expects a formal, minuted handover to the new committee explaining the terms of our sponsorship agreement and our mutual commitment to adhere to the terms. WCFS Directors and staff are willing to assist with this process if required.

## Sponsorship

Sponsorship is a mutually beneficial commercial arrangement or partnership between us and another organisation. We will contribute funds to a specified project, event, club or organisation in return for recognition, acknowledgment and/or other promotional activities. Sponsorship is not advertising, hospitality, or return of favour, and does not include donations or grants.

### Examples of Sponsorships

Sporting clubs and social projects including fundraising events, sporting equipment, uniforms, surfaces, goals, etc.

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The vital support that Community Bank Warrandyte gives our small local schools is so important in helping the children in our community gain access to quality learning and resources.

Nieta - Warrandyte Primary School



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We are blessed to have the Community Bank and all of the support and investment that it brings to the community. Thank you very much for being a Santa Claus all year around making so many projects and events a reality for our community.

Phil - Warrandyte Sporting Group



## Grants

Grants are a part of WCFS social responsibility program to fund specific projects that will enhance and provide tangible benefits to the entire community it services.

WCFS sets aside funds each year which are held in trust with the Community Enterprise Foundation (Foundation) for community projects. Charitable grants through the trust are governed by the Tax Office and/or law.

### Examples of Grants

- Families, children, youth and activities for the aged
- Public health and wellbeing, safety programs and services
- Community capacity building projects
- Public education, including school buildings and libraries
- Innovative community services
- Cultural and arts initiatives
- Environmental projects
- Community facilities (halls / pavilions)
- Sporting facilities (clubrooms) if ALSO used by non-sporting community groups
- Sports programs for disadvantaged people and member welfare programs

## Community Enterprise Foundation™

Grants are administered by the Community Enterprise Foundation™ (Foundation).

The Foundation has an online platform for all grant applications and will receive and process grant applications for our Board to review. Following the review process, and in consultation with us, the Foundation will advise applicants of the outcome and arrange payment to successful recipients.

For further information, please contact the Foundation directly on 1300 304 541 or [Foundation.Mailbox@bendigoadelaide.com.au](mailto:Foundation.Mailbox@bendigoadelaide.com.au)

### What can't be funded?

- Projects that have been completed or reimbursement for costs already incurred prior to the submission of the application
- Political or religious events, held solely to promote the ideology of the group
- Events or programs that denigrate, exclude or offend minority groups
- Events that create environmental hazards
- Programs sponsored by competitors
- Illegal activities
- Funding of individuals or families
- Government entities (conditions apply, you may need a project partner - contact the Foundation for clarification)
- Organisations that have private benefits for members
- Payment of salaries

## Application tips

- 1 Check that your not-for-profit organisation meets the conditions of application outlined in this document.
- 2 Determine if you are applying for a grant or a sponsorship. If you are unsure if your project qualifies for a grant or a sponsorship speak to the Foundation team on 1300 304 541.
- 3 Submit the application online and in full.
- 4 To apply for a grant go to [www.bendigobank.com.au/foundation](http://www.bendigobank.com.au/foundation) (under *Apply for Funding tab and Grants*).
- 5 To apply for a sponsorship use link, Community Bank Warrandyte - Sponsorship Applications
- 6 Links will be sent via email.
- 7 Include your latest financial statements.
- 8 Include a realistic and itemised budget, with quotes where possible.
- 9 Demonstrate broad community benefit (for example, attach letters of support).
- 10 Disclose other funding sources.
- 11 Include how you intend to promote Community Bank Warrandyte

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What wonderful news! Thank you for sponsoring our Hybrid Learning @ the Cottage project. We appreciate the support provided by Community Bank Warrandyte, to our organisation and our community.

Louise, Wonga Park  
Community Cottage



## Next steps

### Choose key contacts from your group

It's very important that you have representatives from your group to act as advocates and drive your project at a local level. We ask that you start thinking about who these people will be.

### Choose your project and obtain necessary supporting documentation. Apply for funding

- To apply for a grant go to [www.bendigobank.com.au/foundation](http://www.bendigobank.com.au/foundation)
- To apply for a sponsorship go to Community Bank Warrandyte sponsorship application

## Important dates

These dates have been selected to allow adequate time for the preparation of applications and to allow for the Foundation and the Board to review each application.

21 June 2023	Community Investment Program Information Night
17 July 2023	Applications open
14 August 2023	Applications close
August /Sept 2023	Review of applications Recommendations finalised Due diligence completed and recommendations approved
2 October 2023	Correspondence to applicants Success and decline notifications sent via email
Payments	Grant payment issued once grant agreement has been accepted  Sponsorship payment issued once invoice received.
13 November 2023	AGM and Community Investment Program Presentation evening

## We are here to help

For assistance please contact:

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