Community grants applicant guidelines

For community grant applicants

Version 2.1
Prepared 14 March 2024

This guideline has been prepared to help you apply for our community grants.

Bendigo Bank

Introduction

This community grants program is administered by Upper Yarra Community Enterprise Ltd (UYCE) who operate Bendigo Bank-Community Banks Warburton and Yarra Junction.

Our Mission > Investing Community Assets to Build Community.

Responding to community needs we opened our Warburton branch opened in 2000, and in 2008 we opened our second community bank branch in Yarra Junction.

A cornerstone of the Community Bank model is the sharing of profit with the community, and since opening our doors in 2000 we have returned over $4.8million across more than 300 community groups, organisations and projects in the Upper Yarra.

The Upper Yarra region includes the townships of Warburton, Yarra Junction, Wesburn, Millgrove, East Warburton, Reefton, McMahons Creek, Gladysdale, Powelltown, Three Bridges, Gilderoy (Ie: towns with postcodes of 3799 and 3797).

Our umbrella Community Investment program is a comprehensive suite of programs that support the delivery of our mission – grants, sponsorships, scholarships and donations.

The overall program includes various funding opportunities through Youth programs, Community support programs and specific purpose programs; and aims to be flexible enough to meet the most pressing community needs in the short term, whilst addressing broader long term community projects.

It is brought to you thanks to the people that bank with our Community Bank branches in Warburton and Yarra Junction.

You should **read these guidelines before beginning your application**.

Social purpose focus areas

Bendigo Bank's social purpose focus set its agenda for 'feeding into prosperity', from its products and services through to its commitment to creating positive social change.

Projects may demonstrate outcomes in:

- Animal welfare
- Choice and empowerment
- Community resilience
- Digital
- Disaster recovery
- Environmental
- Financial
- Health
- Housing
- Learning, skills and development
- Safety
- Social cohesion

Funding available

No specified funding limit has been set for this grant round.

Eligibility

You must:

- be an incorporated community or not-for-profit organisation
- not be an individual ▪ have a valid Australian Bank Account
- have a valid Australian Business Number (ABN) or Incorporation Number (INC)
- have a project partner (Auspicing organization) if you have no ABN or INC. A Project Partner is an incorporated community or not-for-profit organization that is willing to enter into the funding agreement on your behalf and help you deliver the project.
- have satisfactorily completed an Online Acquittal (project report) and relevant Marketing package for any previous funding received from UYCE
- include a budget with quotes, and a breakdown of project expenses if specified
- include written evidence of any other income received in support of this proposal eg if you have been awarded other funding for the project; OR have other funding applications/sponsorship applications pending
- submit a Proposal that is within or service the Upper Yarra region ie defined by Postcodes 3799 and 3797

Who is ineligible?

- individuals or unincorporated organisations without an eligible project partner
- For-profit organisations
- Applicant organisations (or partner organisations - if applicable) with an unsatisfactory result to the Anti Money Laundering / Know Your Customer search.
- Applicant organisations where monies are intended to be used to support ongoing or operational business costs such as staff salaries and general operating costs, EXCEPT in Year One where it MAY BE available as an establishment cost. This does not exclude people applying for projects that have an administrative component that is directly connected with delivering the relevant project.

Use of grant funds

Grant funds can be used for projects which align with the program outcomes.

Community Bank Warburton & Yarra Junction will not provide funding for projects that are illegal, commercial or confer private benefits.

We will also not fund projects which:

- take place outside of the Upper Yarra region of Warburton, Yarra Junction and all other townships with postcodes 3799 or 3797
- break or attempt to change the law, or direct political donations
- claim retrospective funding – paying for costs already incurred
- involve gambling
- exclude or offend any part of the community
- encourage violence or involve the use of weapons

- mistreat, exploit, or harm animals
- create environmental hazards
- present a danger to public health or safety
- contribute to modern slavery
- take place solely outside of Australia.

Proposal Criteria

Proposals MUST meet a MINIMUM OF TWO of the following criteria to be considered:

☐ Assist in meeting people's needs for food, clothing, and shelter
☐ Add to the extent to which people are willing and able to associate with each other
☐ Assist job creation, new enterprise, or economic development
☐ Be relevant to the wider community
☐ Enhance and promote new infrastructure and services
☐ Retain capital within the community
☐ Add to the extent to which people can participate in the governance of their community
☐ Build community-wealth rather than individual or privately-owned assets
☐ Be designed to build a stronger, more capable community

Proposal Criteria for Capital Projects:

In the case of capital projects, for example, new, improvement or purchase of assets, the applicant must demonstrate their commitment by making a co-contribution of 50% of funds required, unless exceptional circumstances exist. Copies of valid quotes must also be submitted.

Proposal Criteria for Profit Organizations:

Organizations operating 'For-Profit' ARE NOT ELIGIBLE to apply. Exception may be granted if they can conclusively demonstrate that their Proposal has significant environmental, social, and economic benefit to the Upper Yarra Community and UYCE's business.

Proposal Criteria for Festivals and Events:

Festivals and Event proposals will be subject to the overall proposal criteria and eligibility, and furthermore if successful the following MAXIMUM benchmarks will be used to ensure consistency.

Duration of Event	Allocation
1st or one day event/festival	$2,000
2nd day	$1,000
3rd and subsequent days	$500

Marketing Criteria: Program participants are requested to undertake marketing/promotion of the Community Bank which can incorporate some or all of the following:

☐ social media eg Facebook, Instagram, website

☐ signage, posters in clubrooms / venue

☐ equipment bookings eg marquees, banners

☐ photographs (approved for UYCE to use)

☐ invitation to UYCE/Community Bank representatives to attend openings, delivery of projects

Exclusions:

- Applications that meet the above Proposal Criteria above may still be deemed INELIGIBLE on the following basis:
- Political or religious organizations where the funding is for religious or political purposes.
- Events or programs that denigrate, exclude, or offend minority groups
- Projects that create environmental hazards
- Programs that may present a hazard to the community
- Programs that do not respect the values of the Upper Yarra community
- Programs that are sponsored by Bendigo Bank competitors
- If an applicant does not support the Upper Yarra Community Enterprise, and our Community Bank branches Warburton and Yarra Junction without a valid reason. Valid reasons could include for example - Bendigo Bank does not offer suitable products or services to meet that organization's needs or the organization is externally directed to bank elsewhere.

Assessment criteria

Your application will be competitively assessed against the following merit criteria:

Criterion 1: Alignment with program outcomes (50%)
- How well aligned is your proposed project to the specific program and social purpose outcomes?
- Problem definition and demonstrated benefits for your organisation and the community.
- Need for funding (will your project proceed without our funding).
- The extent to which you demonstrate clear and realistic project goals and objectives.

Criterion 2: Community support/stakeholder engagement (20%)
- Evidence of support from the broader community showing how your project will benefit local people or the local community.
- Evidence of support from other stakeholders who are critical to your project delivery.

Criterion 3: Capacity to deliver (20%)
- Track record delivering similar projects.
- Financial viability (if applicable).
- Proposed project is realistic and achievable.
- Other funding or in-kind support.

Criterion 4: Value for money (10%)
- Budget is reasonable and reflects good value.
- Proposed outcomes are proportionate to proposed investment.

How to apply

You should read and understand these guidelines before beginning your application.

You can submit multiple applications for funding to the same grants program, but each project requires its own application unless they are directly related.

We will only accept one application per project. You must complete and submit an online application using our application hub.

Use our application hub to complete and submit your online application:

[Home Page - Community Bank Warburton & Yarra Junction (smartygrants.com.au)](smartygrants.com.au)

We will send you a confirmation email to the registered email address once your application has been submitted.

Please note: To ensure a fair process, we will not accept late applications or provide extensions.

We may contact you contact you during the assessment process to request more information, evidence or to clarify information provided in your grant application.

UYCE / Community Bank Warburton & Yarra Junction may refer this application to the Community Enterprise Foundation to assess and administer the grant. If this happens, you will be notified and provided with relevant information.

Supporting documentation

You must provide the following supporting documentation for a small grant (less than $10,000):

- Current bank statement for your organisation.
- Project budget which clearly shows how you will spend the funds, and quotes for all budget items greater than $5,000.
- Letters of support to demonstrate community need and benefit (optional).
- Applications involving a project partner must include a letter of their support and a copy of their financials. Email us for a template.
- Proof of other approved funding or your own funds to put towards the project. (including in-kind support).
- Evidence of all necessary licences, permits and insurances which will enable you to run your project (e.g. public liability insurance, local council permits).
- For projects involving children, evidence that relevant personnel have Working With Children Checks.

You must provide additional supporting documentation for large grants (greater than $10,000):

- Current signed audited financial statements for the applicant organisation or project partner (where applicable).
- Organisations not required to audit financials must provide a profit and loss statement as a minimum, and a balance sheet if available.
- Quotes for all budget items greater than $5,000 (at least two local itemised quotes where possible). If you are applying for funding for wages, please attach a position description and a copy of the relevant award.
- If you have conducted this project/program before (e.g. annual events), copies of receipts/invoices that substantiate this request from previous expenditure plus a detailed budget.
- Plans/designs for projects that involve building or refurbishment.

- Letters of support to demonstrate community need and benefit, particularly for large projects or initiatives that have a sporting or recreational element and need to show wide community benefit.

Decisions on applications

Timing of notifications will vary, however applicants are usually notified by email within 4 – 8 weeks of the program closing date.

Managing your grant

Keeping us informed

You must notify us about anything which is likely to impact your organisation and its ability to deliver your project. This may include, but is not limited to, changes to your organisation's name, address, financial situation, senior staffing arrangements, or significant changes to the project budget.

Grant agreement variations

We understand that circumstances change and things don't always go to according to plan. If there has been a change that will impact your project, you can request a variation to your grant agreement by contacting us.

We will consider your request, and if we decide to accept your proposed changes, we will issue a deed of variation.

Reporting requirements

You will be required to complete a Project Completion Report within 60 days of your nominated project end date. The Project Completion Report will be submitted electronically through the application portal. The report includes information about how the grant was spent, the outcomes, achievements of the project, and any lessons learned.

Privacy information

[View our privacy policy](#).

Enquiries

Application queries

Contact Upper Yarra Community Enterprise
Email: admin@upperyarra.net.au

For technical support with application hub

SmartyGrants–Our Community
Phone: 03 9320 6888
Email: service@smartygrants.com.au