

Mundaring **Community Bank[®] Branch**



COMMUNITY FUNDING GUIDELINES

INFORMATION PACKAGE

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IMPORTANT INFORMATION – PLEASE READ BEFORE APPLYING!

Please read these guidelines before you complete and application form – and speak with our Corporate Manager if you would like to clarify anything before you proceed.

What is the Mundaring Community Bank® Community Funding Program?

Mundaring Community Financial Services Limited ('MCFS') is a company formed to operate the Mundaring **Community Bank**® Branch Bendigo Bank, which we have successfully operated for more than eight years. The company was formed in response to demand from within the Mundaring community for local banking services that would offer a community building focus with the profit share from the operations of the Mundaring **Community Bank**® Branch Bendigo Bank.

MCFS shareholders have been sharing the profits with the community during the past few years and have now developed a priority plan for funding and sponsorship for the region. The funds are offered on a competitive basis to organisations with a focus on the Shire of Mundaring region. The available funding may be applied for in the form of either a sponsorship partnership opportunity, or funding for equipment, or for a project. You will need to discuss your options with us prior to completing the form attached to this package.

MCFS sponsorship funding is very competitive, and we have an accountability not only to the community but also to those organizations and customers who have invested and supported the Mundaring **Community Bank**® over the past seven years. To ensure that we are fair in our assessment, we make applicants aware that the first filter used to assess applications is based on whether there is or will be reciprocal support in the form of customer banking. The following will apply to all applications received:

Band A applicant banks with Bendigo Bank
Band C applicant is not a Bendigo Bank customer

Applications from Band A will be given first preference in our assessment rounds, Band B will only be considered if there are unexpended funds in June of any year during the strategy.

Please note that the MCFS funding pool is limited and applications may not be approved for the full amount requested. MCFS reserves the right to make an offer of less than the amount applied for in any application.

PLEASE NOTE:

This process replaces any previous application process (including previous forms) and ALL applications for more than \$500 will need to be submitted on the "Application Form CURRENT" for consideration by the MCFS Board. Canvassing of Board members will result in the application being excluded from consideration.

You are encouraged to discuss your application with the Corporate Manager, Allison I'Dell, before submitting your application.

Telephone: 9274 6833 (Office) 0417 954 805 (Mobile)
Email: Allison@mundaringcommunitybank.com.au

Who is eligible to apply?

Applications are encouraged from all community groups, associations and not-for-profit organizations which are incorporated under the provisions of the *Associations Incorporation Act WA (1987)* or a not-for-profit, non-government corporate body either created by government or with an Australian Companies Number (ACN) or Australian Business Number (ABN) or a school. Commercial organizations will generally not be considered, although discussion with the Corporate Manager should take place to determine the appropriate fit with MCFS' strategies.

Eligible organizations will generally be located within the Shire of Mundaring, although adjacent local government areas can be considered if the project will have a significant impact on the Mundaring community.

Applications from individuals will **not** be considered for funding.

Organisations applying for funding must operate within the Shire of Mundaring and preference will be given to banking customers of the Mundaring **Community Bank®** and Bendigo Bank.

All applications will only be considered for funding if they can show achievable objectives and clear benefits for the Mundaring community.

What activities are eligible?

Consideration will be given to funding the following:

1. Capital projects and items;
2. One-off projects, activities or events;
3. Seeding grants for projects, activities or events which can demonstrate independent viability after an appropriate period;
4. Projects, activities or events where other sources of funding are included in the budget and MCFS sponsorship is a part of the total funding pool.

In limited circumstances, MCFS may fund the following:

1. Deficit funding – for organizations which are experiencing a shortfall in cash revenue or anticipated revenue;

MCFS will not fund the following:

1. Retrospective funding – expenses incurred prior to the application being submitted.
2. Recurrent salaries and recurrent operational costs;
3. More than one request for funding in any calendar year;
4. Individuals – but they must submit an application on the APPLICATIONS FOR LESS THAN \$500 form, as we limit sponsorship to \$500 to individuals;
5. Government or quasi- government agencies, including local government with the exception of school parent and family associations or projects;
6. Projects considered part of a school's core activities.

How do we assess the applications?

Applications will be assessed against the following factors:

1. The application is complete and provides information about how the funds will benefit the Mundaring community;
2. Supports the vision and values of MCFS;
3. Demonstrates value for money, a demonstrated need and an opportunity to promote MCFS and/ or the Mundaring **Community Bank**[®];
4. Additional support from other organisations either in cash or kind;
5. Appropriate accountability processes being in place;
6. Inclusion of all relevant documentation; and
7. Compliance with MCFS Community Funding Guidelines.

What are the conditions of funding?

Organisations seeking funds through this program must be prepared to sign a Funding Agreement in the event that their application is successful.

Successful organizations **without** an ABN must be prepared to sign a “Statement of Supply” Form in order to be funded.

Successful organizations with an ABN and which are not GST registered must be prepared to agree to the issue of a Recipient Created Tax Invoice from the MCFS and the conditions of its issue as stated below:

- *The organization cannot issue tax invoices to MCFS in respect to the funds supplied;*
- *The organization acknowledges that it is registered for GST when signing the funding agreement and will notify MCFS if it ceases to be registered; and*
- *Successful organizations must be prepared to complete all required documents, such as the funding agreements within a set time schedule.*

For all funding, it is a requirement that an acquittal of funds, together with a report outlining the success of the project in meeting its objectives is provided. The acquittal of funds is to occur within six weeks of the completion of the project.

It is a requirement of funding that MCFS’ financial support will be acknowledged through means such as advertising, promotion and any media publicity associated with any project, activity or event. Approval may be given to use Mundaring **Community Bank**[®] Branch Bendigo Bank logo where appropriate.

In some instances, there may be a requirement to participate in some promotional activities during, or at the completion of, the project, event or activity as part of MCFS’ community communications program.

How do we apply?

General Application Information

Your application must be made in writing, using the appropriate application form (Application Form CURRENT, which is separate to these Guidelines) and attach separate information where necessary.

While organisations may submit more than one application per annum, **only one application per organisation will be funded in any one financial year.**

Applicants will be advised of the outcome of their application within ten days of the Board meeting each month. All applications are approved by the full Board of MCFS on the recommendation of the Corporate Manager and the Assessment Panel.

Steps for Applying for Funds

- Determine if your organisation is eligible – discuss options if needed with the Corporate Manager.
- Determine which category of funding you are seeking. The categories are listed in the introduction to these guidelines.
- Ensure that you have the agreement of your organisation to apply for the funds.
- Contact MCFS Corporate Manager and discuss your intentions for assistance with the application.
- Complete your application using the appropriate Application Form and forward to MCFS.

Address for applications

Completed application forms should be submitted as follows:

By Post: P.O. Box 3443
Midland WA 6056

By Fax: **9274 6855** (hard copy with original signatures should be received by 5pm
two business days later)

In Person: Mundaring **Community Bank**[®] Branch Bendigo Bank
6945 Great Eastern Highway
Mundaring WA 6073

By email: Allison@mundaringcommunitybank.com.au