

ANZ COMMUNITY FOUNDATION GUIDELINES

The ANZ Community Foundation is funded by regular contributions made by ANZ staff and ANZ. Established in 1988, the Foundation supports small to medium-sized projects run by charitable organisations that offer a direct and tangible benefit to local communities. Where structured volunteering by ANZ staff members would add value to the funded project, ANZ is keen to facilitate this type of in-kind support.

WHAT PROJECTS ARE FUNDED BY ANZ COMMUNITY FOUNDATION?

ANZ's purpose is to shape a world where people and communities thrive. In support of this, the ANZ Community Foundation provides grants of up to \$30,000 to community projects that relate to one of the following priority areas:

- Improving **financial wellbeing**, particularly for under-represented and disadvantaged people in our community, including initiatives that improve economic participation for example through building financial literacy and developing vocational skills and providing access to meaningful work
- Improving **environmental sustainability** through initiatives that restore and conserve the natural environment or which contribute to water stewardship, lower carbon emissions¹, and waste minimisation
- Improving **housing access** through initiatives and programs that support those experiencing or at risk of homelessness or that provide supports for people living with a disability
- **Other community projects** that assist local communities to thrive.

Please note:

- Pending application quality and jurisdictional spread, all four priority areas have the same notional allocation in any given grant round. Incorrect categorisation will not enhance an application's chance of success and may result in disqualification.
- Accurate categorisation will be evident if the primary objective and measurable outcomes of the project are aligned with the chosen priority category.
 - A community initiative established to accept and distribute used goods to support vulnerable or disadvantaged people is considered an "other community project". This project is not an environmental sustainability project as the core mission, objectives and quantifiable outcomes do not focus on waste minimisation.
 - Initiatives that distribute goods only with limited engagement to build financial capability belong in the Other category.

Preference is given to organisations and projects that

- Have the support of an ANZ staff member as a Sponsor. Sponsors must be able to meaningfully champion your project and the organisation during ANZ's selection process. As such, we discourage cold calling ANZ staff to act in this capacity.

¹ Please refer to rooftop solar capital investment example as to what can and cannot be funded



- Have well developed implementation plans, including confirmed additional funding through self-funding or other organisations where required
- Can demonstrate success in achieving impact, appropriate to the nominated priority focus area, through appropriate evaluation and reporting.

The following cannot be funded

- Endowments or any other revolving/pooled fund whereby a grant recipient seeks to distribute funds on the ANZ Community Foundation's behalf
- Fundraising events / campaigns and appeals
- General operating expenses including but not limited to:
 - wages
 - day to day expenses
 - debt retirement and budget deficits
 - Retrospective funding
- Capital investment including but not limited to buildings – refer example below of when capital expenditure is deemed appropriate

The ANZ Community Foundation's underlying principle that capital expenditure is eligible where integral to the success of a specific project and where the end beneficiary is beyond that of the applicant.

For example:

- Applications seeking grant fund to install rooftop solar on a community building are ineligible.
- Applications seeking grant funds to install rooftop solar, where the solar investments are integral to the success of a community project, are eligible. Illustrative examples could include electricity generation to aid disadvantaged people study after dark, demonstration sites to educate and train the community, electricity to power water pumps for a community garden.

What types of organisations can apply for grants?

Organisations must be charitable, and have Deductible Gift Recipient (DGR) Item 1 status in order to apply for an ANZ Community Foundation grant.

The following applicants are not eligible

- Individual applicants
- Political organisations
- Religious or sectarian organisations involved in purely religious/sectarian activities
- Foundations that are themselves grant-making bodies
- Bequest programs
- Schools
- Hospitals, medical centres or medical research institutes

If your application does not align with the guidelines for the ANZ Community Foundation you can also refer to other small granting programs managed by Equity Trustees to which your project may be eligible.



ACKNOWLEDGING THE FOUNDATION

Grantees are welcome and encouraged to acknowledge ANZ Community Foundation support. This can be completed via social media, or in person events. If there is a formal launch / opening, we would encourage grantees to get in contact with the foundation about providing a representative.

HOW DO YOU APPLY FOR A GRANT?

1. Read all material in these Grant Guidelines.
2. Complete the Grant Application form and submit online, via Smarty Grants ensuring you supply all the information requested.

GRANT APPLICATION TIMELINE

Applications close in April, with assessment taking place in May-July. All applicants and their sponsors can expect to be notified to the outcome of their application in August.

If you have any additional questions, please contact Equity Trustees via: charities@egt.com.au

There is one granting round each year (closing date for applications is 11 April 2023).