

Westfund Community Grants Program - Terms and Conditions

1. The Westfund Community Grants Program is open for applications year-round. Westfund will assess and fund grants twice per calendar year (assessment periods). Assessment periods will be defined by Westfund and advertised online at www.westfund.com.au. These dates are subject to change at Westfund's discretion.
2. The total maximum amount payable for a Westfund Community Grant is \$3,000.
3. Applicants can apply at any time via the always-on application form, however grant funding will take place during two assessment periods per calendar year.
4. Only one grant can be approved per project, program or event. For ongoing projects and programs, refer to point 15.
5. An applicant may only apply for one grant per year. An applicant or organisation may only receive one grant per calendar year, however they are eligible to apply in future calendar years.
6. Submission of an application does not guarantee funding. The costs of preparing an application are borne by the applicant.
7. Only completed, accurate applications will be assessed. Applications could be considered ineligible if not all necessary information is provided.
8. Applications will only be assessed when completed through the online Community Grant Application form.
9. Apart from applicant contact details, no information provided in submitted applications can be changed during the assessment periods.
10. Printing errors and other quality control matters will not invalidate an otherwise valid application. All valid applications for grants and entitlements will be considered.
11. No responsibility is accepted for late applications after the assessment period has closed. Any applications received after the assessment period cutoff date will be assessed in the next assessment period. Cutoff dates will be published online at www.westfund.com.au/about/community/westfund-community-grants-program/
12. If, for whatever reason, an organisation is unable to proceed with the project, program or event the funds provided by the Westfund Community Grants Program will be withdrawn or required to be refunded. Westfund may apply discretion to this condition should the reason for non-completion be deemed to be outside of the organisations control (e.g. extreme weather event, pandemic).
13. Any variation to the project, program or event as detailed in the online application must be agreed to in writing by the Westfund Community Grants Program committee.
14. The project, program or event should be completed within six months of accepting the grant. Westfund may require evidence from the organisation of this completion. If it is not completed by this date, the Westfund Community Grants Program may withdraw the grant and require the return of the funding, or any unspent balances at its discretion. For ongoing projects and programs, refer to point 15.
15. Projects, program or events must not have commenced more than six months prior to the assessment period cutoff date for which the grant is applied for. Exceptions in this case may be granted by the Community Grants Committee in the case of an ongoing program or project which is judged to have demonstrated value to the community and is otherwise eligible.
16. Should your application be successful, Westfund may wish to promote your project, program or event and provide details to the media. Photos and videos may also be requested and used for promotional purposes. Westfund will submit any use of your trademark or other intellectual property for prior approval.
17. Any promotional materials that includes the Westfund name or trademark must be submitted for prior approval and you must not use, modify, adapt or translate without our written consent.

18. The application should be completed by an approved delegate to sign on behalf of the organisation.
19. Westfund's decision is final and no correspondence will be entered into.
20. Grants are not transferrable or exchangeable and cannot be taken as cash.
21. Westfund accepts no responsibility for any tax implications that may arise from the grant. Independent financial advice should be sought by successful applicants.
22. Westfund reserves the right to conduct a security verification check at its absolute discretion. Successful applicants may be required to sign a declaration confirming their eligibility to accept the grant.
23. Westfund shall not be liable for any loss or damage whatsoever which is suffered (including but not limited to indirect or consequential loss) or for any personal injury suffered or sustained as a consequence of the implementation, use or enjoyment of the grant.
24. Westfund may, at their discretion, request proof of financial accountability in regards to the acquittal of the grant.
25. These Terms and Conditions are subject to change at Westfund's discretion.

Round One 2023 – 22 May 2023 – 14 June 2023

- Applications must be received before 12pm 14 June 2023 to be eligible for assessment for the funding period.
- The available pool of funding for the Westfund Community Grants Program has been extended by \$20,000, bringing the total to \$140,000 available for Round One 2023.
- This additional funding will be distributed as follows: 3 Major grants (1 x \$20,000 and 2 x \$10,000, totaling \$40,000) and the remaining \$100,000 for regular grants/defibrillators.
- Applicants cannot receive more than one major grant.
- Applicants will be able to nominate themselves for the major grants via the regular grant application form, by answering some additional questions.
- If successful, the applicant will receive a major grant in addition to the normal grant amount of \$3,000.
- Applicants who are applying for a defibrillator are not eligible for a major grant.
- Applicants who nominate for a major grant will be subject to the program selection criteria as outlined in these terms and conditions.
- A shortlist of six (6) applicants will be selected by the Westfund Community Grants Program committee, from which the major grants will be awarded.

\$20,000 major grant

- Applicants who have been shortlisted for the \$20,000 grant will be notified by phone.
- Final decision of the awarding of the \$20,000 grant will be made by Westfund's Executive Management Team, subject to the applicant's fulfilment of selection criteria as outlined by Westfund. This decision is final and no further correspondence will be entered into.
- The six (6) shortlisted applicants will be required to present a short 'elevator pitch' to members of the executive team outlining why they should receive the \$20,000 grant. Pitches will be made via Zoom. If an applicant is unwilling to fulfil this criteria, they will be replaced with an alternative applicant at Westfund's discretion.
- Applicants consent to Westfund recording the Zoom pitch, and acknowledge that the videos may be used on Westfund owned digital platforms and social media to promote the Community Grants Program. Applicants will be notified of the date of the Zoom pitch as decided by Westfund.
- The winner of the \$20,000 grant will be notified by phone. Their details will also be published on Westfund owned digital platforms and social media.
- The winner of the \$20,000 grant is subject to the same terms and conditions as outlined for recipients of a regular \$3,000 grant.

\$10,000 major grants

- The shortlist for the two \$10,000 major grants will consist of the five (5) remaining shortlisted applicants following the awarding of the \$20,000 grant.
- The recipients of the two \$10,000 grants will be decided by a vote – one by the public, one by Westfund staff.
- After successful applicants have been shortlisted and notified, voting will open at 11am Monday 26 June and close at 4pm Thursday 29 June.
- Voting for the two \$10,000 major grants will occur concurrently. Voting for the public will be made available on the Westfund website: www.westfund.com.au/about/community/westfund-community-grants-program/
- The applicant with the most votes from the public vote and the Westfund staff vote will each receive one \$10,000 grant, subject to the applicant's fulfilment of selection criteria as outlined by Westfund. This decision is final.
- If the result of the two votes is tied, the applicant with the second highest votes of Westfund staff will receive the second \$10,000 major grant.
- The winners of the two \$10,000 grants are subject to the same terms and conditions as outlined for recipients of a regular \$3,000 grant.

Grant Selection Criteria

Successful applications will be determined by panel review, based on how well the applications meet the following criteria:

- Does the application align to one of the Westfund Community Grants pillars? - Can the organisation show how and why they are aligned to their chosen Program pillar (Health and Wellbeing, Family and Community or Fit for Life)?
- Does the project/event/program have a clear concept and concrete plan and objectives?
- Does the project/event/program meet a real need within the community? Is it an appropriate, clear and measurable response to this need?
- The knowledge and experience to get the job done: Does the applicant have the knowledge, resources and capacity to deliver on their proposed event, project or program?
- Promoting healthy communities: Is the project/event/program providing a significant health related benefit?

Ineligible for funding

The Westfund Community Grants Program's purpose is to support groups and initiatives that promote the pillars upon which the Program is based - Health and Wellbeing, Family and Community and Fit for Life. With this in mind, we are unable to support the following:

- Staff wages and administration costs
- Accommodation and Travel costs for staff of an organisation or that would otherwise be completed as part of normal business operations
- Appearance fees, prize money and trophies/medals
- Presentation/celebration functions

- Food and/or catering for a function/event
- Private or commercial ventures
- Sponsorship
- Council costs incurred in securing Development Approval
- Insurance costs (public liability, general liability, etc.)
- Projects that cannot demonstrate community support and benefit
- Projects for the construction/ upgrade of roads or carparks
- Purchase of land or rental of premises
- Purchase of office equipment (e.g. desktop computers, printers, photocopiers etc.)

Conflict

A conflict of interest may exist, for example, if the funding proponent (Westfund) or any of its personnel:

- Has a relationship (whether professional, commercial or personal) with a party who is able to influence the appraisal process, such as a Westfund staff member;
- Has a relationship with, or interest in, an organisation, which is likely to interfere with or restrict a successful funding proponent from carrying out the proposed activities fairly and independently; or
- Has a relationship with, or interest in, an organisation from which they will receive personal gain as a result of the granting of funding under the Community Grants Program.

Applicants will be required to declare as part of their proposal, existing conflicts of interest or that to the best of their knowledge there is no conflict of interest, including in relation to the examples above, that would impact on or prevent them from proceeding with the project or any agreement they may enter into if funding were approved under the Community Grants Program. Where an applicant subsequently identifies that an actual, apparent, or potential conflict of interest exists or might arise in relation to their proposal for funding, they must inform Westfund Health Insurance in writing immediately. In the event that a conflict of interest arises when a grant is being awarded via an internal voting process, the staff member must abstain from participating in the vote. Conflicts of interest in this instance will be judged by the program co-ordinator.

Notification to Applicants

- A system-generated email will be sent to all applicants where a completed application has been received.
- Applicants will be notified that their application is either successful or unsuccessful within 30 days of the close date for the assessment period. Notification will be sent to the email address supplied by the applicant in their application.
- Westfund accepts no responsibility for any successful/unsuccessful correspondence that is not received by the applicant due to incorrect data entry, full mailboxes or other technical issues outside of their control.
- Successful applicants will also be contacted by phone. Westfund will use the contact details provided by the applicant in their application.
- Details of successful applications will also be displayed on the Westfund website, www.westfund.com.au

Acceptance and Payment of Grant

- To receive funds, successful applicants will be required to formally accept the Terms and Conditions of the grant. Westfund will supply a copy of this document via email for the applicant's acceptance.
- An invoice for the approved grant must be supplied by the applicant within 10 days of notification of grant approval for the total amount of the grant. Invoice must include payment details, full organisation contact details, ABN and invoice number. The invoice can be emailed to community@westfund.com.au
- Grant amounts are for a maximum of \$3,000 total. GST should not be added as a separate line item on invoices nor increase the total available grant amount of \$3,000.
- Westfund will endeavour to make payment within 14 days of receipt of invoice. Payment will be made by direct deposit.
- These timeframes are subject to change at Westfund's discretion.

Acceptance and Delivery of Defibrillator

- Westfund work with our partners at the Defibshop to distribute defibrillators to the successful applicants.
- The defibrillator is a ZOLL AED Plus - fully automatic model. RRP \$2,495. Full product details: www.defibshop.com.au/shop/zoll-aed-plus-fully-automatic/
- To receive a defibrillator, successful applicants will be required to formally accept the Terms and Conditions within 10 days of notification of approval. Westfund will supply a copy of this document via email for the applicant's acceptance.
- Successful applicants will need to confirm the correct address that the AED will be shipped to.
- Westfund will provide details to the Defibshop staff in order to organise shipping of the AED to the nominated address within 14 working days of receipt of accepted Terms and Conditions.
- A Defibshop representative may contact the applicant to confirm details of shipping, tracking and delivery.
- These timeframes are subject to change at Westfund's discretion.

Privacy

- All applications become and remain the property of Westfund. Westfund collects personal information about you and the organisation you represent to enable you to submit your application. To do this, Westfund may disclose your personal information to other companies associated with this program (such as the Defibshop). If you do not provide your personal information, Westfund will not be able to enter you into this program. In most cases, you can gain access to your personal information by contacting Westfund's Privacy Officer on 1300 937 838. To view our Privacy Policy visit www.westfund.com.au/privacy-policy/
- Your contact information will only be used to contact you in relation to the Westfund Community Grants Program.

The Westfund Community Grants Program is promoted by Westfund Ltd. ABN 55 002 080 864, 59 Read Ave, Lithgow, NSW 2790.