

# Community Grants program guidelines



July 2024

## Uniting our people, customers, and communities in creating a healthier world.

### About the Bupa Foundation Community grants program (Program)

The Bupa Foundation is dedicated to promoting health and wellbeing through the prevention and control of diseases. As a health promotion charity, we are committed to making a positive impact on communities by offering funding of up to \$10,000 for eligible organisations and charities conducting innovative projects and initiatives designed to positively impact the communities where Bupa operates.

We seek applications that clearly align with our purpose of preventing and controlling diseases.

*For the purposes of this program, diseases include any mental or physical ailment, disorder, defect or morbid condition, whether of sudden onset or gradual development and whether of genetic or other origin. Examples include asthma, cancer, clinical depression, diabetes, heart disease, hepatitis, multiple sclerosis, post-traumatic stress disorder and viral infections.*

Applications demonstrating a meaningful connection to Bupa will be highly considered.

#### Our key focus areas include:

- **Healthy minds** - building mentally healthy and resilient communities
- **Healthy planet, healthy people** - supporting a healthy planet for healthy people

We look forward to receiving your applications and working together in helping people live longer, healthier, happier lives and making a better world.

#### Grants program timeline

- Applications open 29 July 2024
- Applications submitted online via application platform
- Applications close 5pm (AEST), 6 September 2024
- Successful applications notified by December 2024
- Completion report within 12 months of funds granted (interim report at 6 months)

#### How the program works

Eligible organisations may apply to receive one grant from Bupa of up to \$10,000. Organisations may submit a maximum of one application per focus area: Healthy minds or Healthy planet, healthy people, but only one grant will be awarded per organisation.

Bupa reserves the right to decide, in its sole discretion, whether and how the grant money is distributed.

#### Making your application

To be eligible for a grant, an application must meet the requirements set out below. Only eligible applications will be considered.

## 1. Eligibility requirements

Applications must have a strong alignment to Bupa Foundation's focus area.

Applications demonstrating a meaningful connection to Bupa's business or people will be highly considered.

Applicants must be community organisations registered in Australia or New Zealand as a not-for profit or charitable organisation, with a current ABN/NZBN.

Although not compulsory, it is preferred that organisations are:

- a) (Australia) Endorsed by the ATO with Deductible Gift Recipient (DGR) status and covered by Item 1 of the table in section 30-15 of the Income Tax Assessment Act 1997 (Cth)\*.

Or

- b) (New Zealand) An approved donee organisation and registered under the Charities Act 2005.

## 2. Eligibility requirements for the project or initiative

We want to make a positive impact on our people and customers' communities so your application must relate to one specific project or initiative that your organisation will deliver.

Projects or initiatives demonstrating a meaningful connection to Bupa's business or people will be highly considered.

Projects must have a strong alignment to Bupa Foundation's focus areas.

The initiative must meet all the following criteria:

- a) Clearly align with our purpose of preventing and controlling diseases
- b) Take place in, and directly benefit, the communities in which Bupa operates
- c) Have a positive impact under our key focus areas and relate to at least one of the following themes:

**Healthy minds** - Building mentally healthy and resilient communities:

- i. Grow the next generation of mentally healthy and resilient kids;
- ii. Create more social connections to improve emotional wellbeing; or
- iii. Help Australians/New Zealanders to better take care of their mental health.

**Healthy planet, healthy people** - addressing the health impacts of climate change:

- i. Empower the community by providing simple actions to combat climate change and increase understanding of the associated health impacts;
- ii. Seek better health outcomes by addressing what's wrong with the physical world; or
- iii. Conservation and clean-up activities that also provide health and wellbeing benefits for participants.

The Program will **not** support the following types of initiatives:

- Programs delivered in a country which isn't either Australia or New Zealand.
- General funding for an organisation.
- Core operating and administrative costs of an organisation, e.g. conferences and seminars, travel, salaries, office or general equipment.
- Capital works projects or commercial requests.
- General fundraising appeals or fundraising activities, for example charity golf days, dinners, advertising.

- Requests for grants for the purpose of raising funds for a third party.
- Political or religious activities.
- Requests for grants directly to individuals or families.
- Programs that may present a hazard to the community or the environment.
- Programs or initiatives that may be construed as prejudiced or discriminatory.

### Application as acknowledgement of eligibility

It is important all eligibility criteria set out in items 1 and 2 above are met. Therefore, before you apply, please ensure:

- Your organisation and project meet these criteria to the best of your knowledge.
- You have read the Guidelines, the Grant Terms and Conditions and the FAQ's with them.

Bupa Foundation reserves the right to disregard an application if it considers the application does not meet any of the eligibility criteria set out in items 1 and 2 at any time.

### Application tips

Applications which do one or more of the following things will be considered favourably in the evaluation process:

1. Demonstrate a meaningful connection to Bupa.
2. Promote diversity, accessibility, and inclusion.
3. Support the health and wellbeing of Aboriginal and Torres Strait Islander peoples in Australia and the Tangata Whenua (people of the land) in New Zealand.
4. Identify realistic, measurable, and achievable project goals and outcomes.
5. Offer opportunities for Bupa team member engagement i.e., volunteering, in-kind support.

### Deciding and announcing the successful applications

Successful applications will be chosen in accordance with the following procedure:

- Applications will be externally assessed, validated and shortlisted by our grants partner Workplace Giving Australia (Good2Give).
- Successful applications will be notified by email by December 2024.
- Successful applications will be announced across Bupa channels by December 2024.
- Unsuccessful applications will be advised of the outcome by December 2024.

Those requesting feedback and guidance for future applications should contact [foundation@bupa.com.au](mailto:foundation@bupa.com.au)

# Community Grants Terms & Conditions



## About the Bupa Foundation Community Grants (Program)

Successful organisations will receive an email with a media release form and letter offering them a grant under the Bupa Foundation Community Grant Program (**Program**) based on the Grant Terms and Conditions set out in this document ('Grant Offer Letter').

To accept the Foundation's grant offer, the successful organisations must return a copy of the following documents by requested date to the Bupa Foundation.

- a signed copy of the Grant Offer Letter; and
- a signed copy of the Media Release form.

Once signed by the successful organisation, the Grant Offer Letter, these Grant Terms and Conditions and the media release form will constitute the Foundation's agreement with the successful organisation for a grant under the Program ('Grant Agreement').

## Confirmation of eligibility

By signing the Grant Offer Letter, the successful organisation continually warrants and represents that they meet the eligibility criteria set out in clauses 1 to 2 of the 2024 Bupa Foundation Community Grants Program - Grant Guidelines ('Eligibility Criteria'). The successful organisation must promptly notify the Foundation in writing if they become aware at any time that they do not meet or cease meeting any of the Eligibility Criteria.

## Successful organisations' obligations

Grants will be awarded to the best applications as assessed in accordance with the program criteria. Assessors reserve the right to disqualify any applicant submitting an application which, in the opinion of the assessors, includes objectionable content or does not meet the eligibility criteria outlined in the Guidelines. The assessors' decision is final and no correspondence will be entered into.

In accepting the grant, successful applicants acknowledge and agree to any reporting requirements. This may include, but is not limited to, a written report, case study, photographs and members of the successful applicant organisation taking part in a video and or interview. Successful applicants must sign a Grant Offer before grant funds will be paid or advertising collateral published. By signing the Grant Offer Letter, the successful organisation agrees to do all the following:

- Only use the grant funds to implement the eligible initiative referred to in the Grant Offer Letter and as further set out in the relevant application form.
- Spend the entire amount provided by the Foundation under the Program within 12 months of the date on which the grant is received.
- Ensure any grant is spent in a manner that complies with all applicable laws and regulations. The Foundation will not be responsible for any unlawful activity which takes place, whether intended or not, in connection with any organisation's use of a grant made under the Program.
- Continually and fully indemnify the Foundation against any loss or damage that may be suffered or incurred by the Foundation in connection with any act or omission in breach of this clause by the successful organisation.

- Seek the written approval of the Foundation before using the Foundation's brand, logo or name across any communications media, including but not limited to the successful organisation's social media channels, website, publications and email communications.
- Provide a completion report (submitted via the grants platform) including outcomes and impact data, within 12 months of the grant being received.
- Provide a progress update 6 months following the receipt of grant funds.
- Grant the Foundation a royalty free, perpetual, irrevocable, sub-licensable right to use their brand, logo and name for promotional purposes in connection with the Program subject to the prior written approval of the successful organisation of all such use. The successful organisation agrees that they will not unreasonably withhold or delay their consent.
- Ensure the Foundation's confidential information is kept confidential and only use the Foundation's confidential information as required for the proper performance of this Grant Agreement. The successful organisation may only disclose confidential information:
  - To persons who need the information for the proper purpose of this Grant Agreement.
  - As required by law or by a stock exchange; and
  - To a legal, financial, or other advisor including an auditor of the successful organisation.

Any such disclosure must be made on an expressly confidential basis.

## Revoking the grant offer letter or terminating the grant agreement

The Foundation may not proceed with making an offer, revoke a Grant Offer Letter or terminate the Grant Agreement:

- Upon 14 days' written notice to the successful organisation if they:
  - Fail to meet or cease to meet the Eligibility Criteria;
  - Breach the Grant Agreement; or
  - Do anything which, in the reasonable opinion of the Foundation brings or is likely to bring the Foundation into disrepute or subject the Foundation to adverse regulatory or community scrutiny; or
- Immediately upon written notice to the successful organisation if they:
  - Provide to the Foundation incorrect, false or misleading information (or withholds relevant information); or
  - Is or become Insolvent. For the purposes of this clause, 'Insolvent' means anything that reasonably indicates there is a reasonable risk that the successful nominated organisation is or will become unable to pay their debts as and when they fall due or if they cease, or indicate that they are about to cease, carrying on business.

## Privacy

Bupa Foundation collects personal information from the applicant to conduct the Program, including during the grant application process and accepting the Grant Offer Letter. We will handle your personal information in accordance with our obligations under the Privacy Act 1988 (Cth) and Privacy Act 2000 (NZ) and any applicable policies. It is a condition of application that you provide this information and if you do not, we may not be able to consider your application.

Where you provide another person's personal information to Bupa Foundation as part of the grant application process, you promise that you have that person's express consent to the disclosure and use of that information by Bupa Foundation to conduct the Program before doing so.

Bupa Foundation accepts no responsibility for any late, lost, delayed, incomplete, incorrectly submitted,

corrupted, illegible or misdirected applicants, claims or correspondence whether due to omission, error, alteration, tampering, deletion, theft, destruction, disruption to any communication network or medium, or otherwise including those applications not received by the Bupa Foundation for any reason. Bupa Foundation is not liable for any consequences of user error including (without limitation) costs incurred. No correspondence will be entered into.

# Community Grants

## FAQs



## Frequently Asked Questions

### Q. What is the Bupa Foundation Community Grants program?

A. The Bupa Foundation Community Grants program offers grants of up to \$10,000 to eligible organisations or charities conducting projects or initiatives designed to positively impact the communities where we operate. We invite applications that demonstrate a meaningful connection to Bupa and strongly align with the Foundation's key focus areas:

- **Healthy minds** – building mentally healthy and resilient communities
- **Healthy planet, healthy people** – addressing the health impacts of climate change

### Q. What is the minimum and maximum grant amount?

A. Applicants can apply for grants ranging from \$5,000 to \$10,000.

### Q. What's the eligibility criteria?

A. The project must:

Be run by a community organisation registered in Australia or New Zealand as a not-for profit or charitable organisation, or community organisation whose purpose is to improve and promote health and wellbeing of the community.

Clearly align with the Bupa Foundation's purpose of preventing and controlling diseases.

Have a positive impact on one or more of Bupa Foundation's priority themes under the focus areas of:

- **Healthy minds** - building mentally healthy and resilient communities
  - Grow the next generation of mentally healthy and resilient kids
  - Create more social connections to improve emotional wellbeing
  - Help Australians/New Zealanders to better take care of their mental health –with a focus on health literacy and support to better navigate the health system
- **Healthy planet, healthy people** – addressing the health impacts of climate change
  - Empower the community by providing simple actions to combat climate change and increase understanding of the associated health impacts
  - Seek better health outcomes by addressing what's wrong with the physical world
  - Conservation and clean-up activities that also provide health and wellbeing benefits for participants.

Be a distinct project. Your application for funding should be applied to a specific project run by a community organisation, not towards the 'business as usual' or operating costs.

Be able to demonstrate outcomes and impact. For example, the organisation must be able to provide information such as who will benefit from the activity, how many people will be impacted by the project, or any high-level health benefits expected.

Be undertaken within 12 months of the grant being awarded. Note – grant funding is not year on

year and any additional funding for a project will need to be submitted as a new application.

### **Q. What does the term ‘diseases’ mean in relation to Bupa Foundation’s purpose of preventing and controlling diseases?**

- A.** For the purposes of this program, diseases include any mental or physical ailment, disorder, defect or morbid condition, whether of sudden onset or gradual development and whether of genetic or other origin. Examples include asthma, cancer, clinical depression, diabetes, heart disease, hepatitis, multiple sclerosis, post-traumatic stress disorder and viral infections

### **Q. Are there any application considerations that will be viewed as highly favourable by the selection committee?**

**A.** Applications which do one or more of the following will be considered favourably in the evaluation process:

- The project has a meaningful connection to Bupa’s business or people, as evidenced by a letter of support by a Bupa employee.
- The project provides opportunities for Bupa employees to be involved beyond initial funding – for example, through the provision of skilled volunteering such as health screenings or introducing an intergenerational playgroup into one of our Aged Care homes.
- The project promotes diversity, accessibility, and inclusion.
- The project supports the health and wellbeing of Aboriginal and Torres Strait Islander peoples in Australia and the Tangata Whenua (people of the land) in New Zealand.
- The application identifies realistic, measurable, and achievable project goals and outcomes.

### **Q. How do I apply?**

**A.** Complete and submit the application online by 5pm AEDT on the closing date, 6 September 2024. No extensions will be provided.

### **Q. How will the grants be assessed and awarded?**

**A.** Applications will be reviewed, validated and shortlisted by Workplace Giving Australia. A panel from Bupa’s Community Engagement team will determine the final selection for endorsement by Bupa’s ESG Committee.

If successful, it is intended grants applicants will be notified by December 2024.

The decision is final, and no correspondence will be entered into.

Funding will be awarded to the successful organisation to undertake and complete the project within a 12-month period.

### **Q. Who is Workplace Giving Australia (Good2Give)?**

**A.** Workplace Giving Australia is a not-for-profit organisation registered with the Australian Charities and Not-for-profit Commission and the Fundraising Institute of Australia, and who are members of Philanthropy Australia and the Community Council for Australia.

Workplace Giving Australia collaborates with organisations to make giving a part of everyday life, driving change by connecting with businesses, employees and charities to enable more giving.

### **Q. Why would Workplace Giving Australia (Good2Give) contact my organisation?**

**A.** Workplace Giving Australia provides grants services supporting the Program application process, assessment, validation and funds distribution. You may be contacted by them to provide details, including your organisation’s bank details, for validation purposes.



**Q. Can an organisation submit multiple applications?**

**A.** Yes, you can submit one application per organisation, per focus area (Healthy Minds, Healthy Planet Healthy People), but only up to one grant per organisation will be awarded.

**Q. When do I need to complete the project by?**

**A.** Projects must take place between 1 January – 31 December 2025.

**Q. Are there examples of projects and activities that would NOT be eligible for funding?**

**A.** The following would **not** be considered eligible:

- Programs delivered in a country which isn't either Australia or New Zealand.
- General funding for an organisation.
- Core operating and administrative costs of an organisation, e.g. conferences and seminars, travel, salaries, office or general equipment.
- Capital works projects or commercial requests.
- General fundraising appeals or fundraising activities, for example charity golf days, dinners, advertising.
- Requests for grants for the purpose of raising funds for a third party.
- Political or religious activities.
- Requests for grants directly to individuals or families.
- Programs that may present a hazard to the community or the environment.
- Programs or initiatives that may be construed as prejudiced or discriminatory.

**Q. If my grant application is unsuccessful, can I apply again?**

**A.** Yes, you can apply again next funding round provided the project and associated organisation meet the eligibility criteria.

**Q. What are the reporting requirements for successful grant recipients?**

**A.** You will be required to submit a completion report in respect of the initiative, within 12 months of the grant being received, along with an interim progress report.

**Q. What if I have more questions?**

**A.** If you have read the Guidelines, FAQ's and Terms and Conditions, and still have a question please send us an email.

<b>Bupa Internal Enquiries and External Organisation Enquiries</b>	<b>Online Platform Enquiries</b>
foundation@bupa.com.au	grants@good2give.ngo