



# Community investment and funding guidelines



# Building societies together

Strong communities matter to us. We help local organisations thrive by backing local initiatives that build wellbeing and inclusion.

We're a mutual society owned by our clients. Which means when a client chooses to bank with us, they choose to give back to the community. Thanks to the 21,000+ clients, we're able to distribute a significant share of annual profits back into the community via our community engagement and investment programme. We invest to make a real difference in our communities, helping hundreds of not-for-profit groups with sponsorship and funds to support sports, arts, educational, environmental, charitable organisations and more.

## Purpose

Our programme supports organisations which make a positive difference in our society. It allows us to connect more deeply with our communities and aligns closely with our mission to help local organisations thrive by backing local initiatives that build wellbeing and inclusion.

The purpose of these guidelines is to outline our funding pillars and to help you decide whether you qualify to apply for funding from NBS.

## Our strategic principles

To ensure all community investment funding is distributed fairly and that maximum community impact is achieved, our approach is guided by these core principles:

- **Impact first:** We invest where our support will create genuine benefit for people and places

- **Local relevance:** We support local initiatives that reflect community needs and strengthen the places where people live, work and connect
- **Alignment:** Our funding aligns with our organisational purpose and vision
- **Shared value:** All giving creates community value, big and small

## Funding pillars

Our focus areas for distribution of community investment funding are:



### Wellbeing and inclusion

- Financial wellbeing support
- Inclusion and access
- Youth wellbeing
- Care and support services



### Community connection and belonging

- Local events and activities
- Sports and recreation
- Arts, culture and creativity
- Grassroots connection



### Resilience and sustainability

- Environmental sustainability
- Community resilience
- Business and economic participation
- Sustainable community spaces

# Our process

## Eligibility

We welcome applications from:

- Registered charities, including charitable trusts
- Charitable trust boards
- Incorporated societies (under the 2022 Act)
- Schools (through their board of trustees)
- Other not-for-profit social enterprises
- Local authorities, where contributing to a community event or programme
- Business associations or economic development organisations delivering genuine community benefit

Applicants must demonstrate alignment with at least one of our three funding pillars.

We also expect applicants to have a current banking relationship with us, a clear intention to bank with us or to offer a commercial benefit to us. We recognise that some organisations (schools, councils, event organisations) are unable to move their banking to us. Support for these can still be considered where there is strong pillar alignment and community benefit.

## Exclusions

We will not fund:

- Individuals (personal grants, scholarships or donations to individuals)
- Groups with no alignment to our pillars or that demonstrate social divisiveness
- Groups that have previously misused our funding, failed to meet their obligations or acted in a way inconsistent with our values
- Groups that have accepted funds from organisations that do not align with our values
- Political parties, election campaigns or lobbying activities
- Groups or activities that cause environmental damage or that are not sustainable
- Religious or spiritual activities where the primary purpose is promotion of beliefs
- Activities involving weapons, firearms or related industries
- Gambling, betting or gaming activities or events not aligned with responsible community outcomes
- Alcohol, vaping or drug-related promotions or events

- Content or organisations that may cause reputational risk or public controversy
- Activities with significant health and safety risk without clear mitigation
- Government projects that fall under central or local government remit
- Purchase of materials unrelated to a community activity
- Debt repayment, operational deficits or retrospective funding
- Overseas travel or activities delivered primarily outside our regional communities

Sometimes applications may come in that don't always fit with our eligibility or exclusions. These applications will be reviewed against our [community giving code](#) by the head of marketing and chief client officer to make a final decision.

## Application process

To assist in the consistent review of sponsorship applications, organisations must complete an initial application form, within the three funding round dates listed on our website.

There are two types of application forms:

- Large - a request over \$2,500
- Small - a request under \$2,500

These application forms enable us to:

- Learn about your organisation and the people who lead it
- Identify the type and category of funding you are looking for
- Ensure your request aligns with our funding pillars

Visit [nbs.co.nz](https://nbs.co.nz) to complete and submit our online application form

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