

Octopus Australia Community Benefits Fund

Terms of Reference

Document control

Document Status					
Version	Purpose of document	Authored by	Reviewed by	Approved by	Review date
1.0	Final	Matt McNally	Brenton Farr	Darren Brown / Sonia Teitel	19/04/2026

Octopus Australia (OA)

OA is at the forefront of the renewable energy transition and is committed to driving positive change while partnering with communities. OA is committed to being a good neighbour. A Community Benefit Fund (CBF) is created as a discretionary fund designed to support groups and organisations near OA project's boundary.

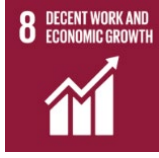
Funds aims and objectives

The objective of each CBF is to:

- Develop innovative and sustainable environmental projects;
- Improve health and education through long-term partnerships and cohesive community projects;
- Strengthen community connections and social well-being;
- Promote cultural diversity and creative community activities.

Fund priorities

Applications should support community connectedness and cohesiveness and align with at least one of the OA's eight United Nations Sustainable Development Goals (SDG) set out in OA's ESG and Impact Strategy. The priorities will vary depending on the region and community needs.

SDG	SDG explanation	Grant opportunity examples
 4 QUALITY EDUCATION	<i>Quality Education</i> Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.	Advancement of education, research, scholarships, early childhood and youth education, tertiary education, apprenticeships, traineeships, and work placement programs.
 5 GENDER EQUALITY	<i>Gender Equality</i> Achieve gender equality and empower all women and girls.	Promotion and support for women and girls across a range of areas, more specifically in male dominated spaces.
 7 AFFORDABLE AND CLEAN ENERGY	<i>Affordable and Clean Energy</i> Ensure access to affordable, reliable, sustainable and modern energy for all.	Projects that proposed energy making devices e.g. solar panels.
 8 DECENT WORK AND ECONOMIC GROWTH	<i>Decent Work and Economic Growth</i> Promote inclusive and sustainable economic growth, full and productive employment and decent work for all.	Promotion of industry, commerce, agriculture, renovation and upgrade of community buildings, and local economic development.
 9 INDUSTRY, INNOVATION AND INFRASTRUCTURE	<i>Industry, Innovation and Infrastructure</i> Build resilient infrastructure, promote inclusive and sustainable industrialisation and foster innovation.	Projects and events helping the community solve future challenges.

	Sustainable Cities and Communities Make cities and human settlements inclusive, safe, resilient and sustainable.	Programs promoting healthy living and wellbeing, community participation, social cohesion, healthcare, childcare, aged care, mental health, and emergency services support.
	Climate Action Take urgent action to combat climate change and its impacts.	Programs and projects that combat climate change, sustainable transportation, improve energy efficiencies, protect ecosystems and reduce waste.
	Life on Land Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss.	Conservation, protection, restoration, and enhancement of the natural environment, prevention of local environmental degradation, and community awareness of sustainability.

Community Reference Group

A Community Reference Group will be established during the construction phase of each project. The members will operate as a reference group to help OA ensure the funds donated each year are going to the correct purposes through the entire asset lifecycle. In some cases, the CRG will be involved in early community support initiatives identified by OA.

Once the CBF is established and providing yearly funds to local communities there will be ongoing monitoring and tracking of the funds through the asset lifecycle, by the CRG and the construction or asset management lead.

Eligibility

Application Eligibility and Documentation Requirements

Applications are open to entities near OA project's. Eligible entities include:

- Incorporated not-for-profit community organisations;
- Groups backed by not-for-profit community organisations.

Eligible organisations may include charities, DGR or PBI status organisations, cooperatives, companies limited by guarantee or shares, ACNC-registered trusts, associations, Local Aboriginal Land Councils, and organisations established under an Act of Parliament.

To be eligible, applicants must:

- Be based near the Project or benefit these communities
- Propose a project benefiting local residents, executable within 18 months
- Have an Australian Business Number (ABN)
- Have current Public Liability Insurance (PLI).

Applicants will be deemed ineligible if they:

- Derive income from gambling or propose activities that promote gambling

- Have a debt owing to the local council where the project will be undertaken.

As part of the application process, the following documentation is required:

- Quotes for goods/services valued between A\$1,000 - A\$5,000 (one quote) or more than A\$5,000 (two quotes)
- Letter of support from the applying organisation (compulsory)
- Letter of support from supporting partner/s (compulsory for large grants, optional for small grants)
- Written approval if the group/organisation uses a facility controlled by a Committee of Management, and the project will impact the facility
- Most recent Bank Statement to demonstrate financial viability and competence
- Annual Financial Statement (for large grants only)
- Copy of Public Liability Insurance if applicable.

Once an application is submitted, the Community Reference Group may contact the applicant for additional information. Original documents should not be included with the application; copies will be sufficient unless otherwise specified.

Eligible Projects

Proposed projects should improve community connectedness and cohesion and meet community needs. Projects are due to be completed within 18 months of the funding announcement. If any projects are affected by unforeseen circumstances, extensions and variations are available at the discretion of the Funding Panel.

Projects are not eligible if they:

- Have the single purpose of promoting religion or political parties
- Are currently fully funded by local, state, or federal governments
- Are intended to fund operational or core business costs including salaries and administration costs
- Are deemed as core curriculum activities of educational institutions.

Assessment Criteria

Applications will be evaluated based on their ability to address the selection criteria and the perceived benefit to the local community. All applications must meet the eligibility criteria and comply with the OA's CBF Terms of Reference.

General selection criteria may include:

- **Project benefits:** Direct and indirect community benefit, quality of life enhancement, operational efficiencies, and demographics served.
- **Target community need:** Public safety, improved access, direct service to the community, and council/community support.
- **Availability of funding:** Prior funding to the applicant and demonstration of financial need.
- **Project/program viability:** Background of the applicant, prior experience, and the extent to which the project duplicates other available facilities or programs.