



## WESTPAC SOCIAL CHANGE FELLOWSHIP

### FUNDING GUIDELINES & FREQUENTLY ASKED QUESTIONS

Thank you for considering applying for a Social Change Fellowship from the Westpac Scholars Trust. We hope these guidelines provide you with the information you need to support your application.

#### 1. Introducing Westpac Scholars Trust

The Westpac Scholars Trust was established as a gift to Australia in celebration of Westpac Group's 200th anniversary. Through the Westpac Scholars Trust we aim to back those with the drive and imagination to shape our nation's future, by awarding 100 scholarships, every year, forever.

Scholarships are awarded across five programs: Asian Exchange, Young Technologists, Social Change, Future Leaders and the Research Fellows. If you are interested in learning about our Westpac Scholars [visit our website](#).

Please do not hesitate to contact us if you have further questions about the program or the application process: [westpacscholars@westpac.com.au](mailto:westpacscholars@westpac.com.au)

Best wishes,

Westpac Scholars Trust Team

#### 2. The Westpac Social Change Fellowship

The objective of the Westpac Social Change Fellowship is to create positive social change in Australia by investing in people who have the drive, the commitment and innovative ideas to improve the wellbeing of Australians.

Westpac Social Change Fellows come from all walks of life and are involved in social change in a variety of ways. For them, passion and commitment is just the start. They have a thirst for knowledge and a unique ability to see opportunities where others do not. They have found their purpose in life, and with it, an idea that can help solve one of Australia's entrenched social problems. You can learn more about our previous Westpac Social Change Fellows by visiting our [website](#).

The Fellowship will provide funding to support experiences that directly invest in your skills, leadership capabilities and networks. Our aim is to help you explore, refine and drive the success of your social change initiative. Your Fellowship experience may involve study tours, work experience, short courses, coaching, stakeholder engagement or building stronger connections.

*"I love that this fellowship is about growing the innovator not the project. It is an investment in developing the game changers, giving us the space and time to grow and connect with the world."*  
**Mary Freer, 2016 Social Change Fellow**

#### 3. The Fellowship Program

Each year, up to 10 successful candidates will receive:

- Funding up to the value of \$50,000 to invest in their personal capacity to lead social change

The Fellowship will enable you to create and put in place a personalised development plan designed to build your capability, knowledge and networks. The aim of the program is to give you the time and space to invest in yourself and to become an even more effective social change leader.

The funding may be directed towards covering:

- Costs associated with overseas or domestic travel to attend conferences or study tours;
- Meetings with organisations delivering leading practice in your field of social change or aligned with your development objectives;
- Short courses (no longer than 4 weeks in length);
- Stakeholder engagement and networking opportunities to build stronger connections with relevant people and organisations; and
- Mentoring and coaching.

- *Lifelong membership of Westpac 100 Scholars Network*

Fellows will be invited to join the Westpac 100 Scholars Network, a network that connects those with bold ideas to build a better future for all Australians. Growing by 100 Westpac Scholars each year, the Westpac 100 Scholars Network offers lifelong access to networking, mentorship, collaboration, learning and development opportunities. The W100 is an incredible platform that will enable every Westpac Scholar to surround themselves with a diverse group of other inspiring leaders. This is a community driven network, where Scholars actively support each other to help achieve their goals.

- *Invitation to the Westpac Scholars Summit (TBC)*

Each year the 100 new Westpac Scholars from our five scholarship programs come together in Sydney to participate in tailored workshops, hear from business and academic luminaries, and form connections with fellow scholars. The Westpac Scholars Trust covers domestic travel and accommodation required to attend the Summit; this expense does not come out of Social Change Fellowship funding.

- *Leadership Development Program*

All Westpac Social Change Fellows will complete a leadership development program together. Dates will be confirmed with successful recipients in February prior to the Fellowship commencing. The expected time commitment in-person is 5 days. Costs of this program and travel are included within the final Fellowship budget.

Full attendance and participation in the Westpac Scholars Summit and the Leadership Development Program is a requirement of holding a Westpac Social Change Fellowship.

#### **4. Eligibility Criteria**

To be eligible, you must:

- Be over the age of 18.
- Be an Australian Citizen or Permanent Resident.
- Be leading an existing social change initiative to address a clearly defined social need in an Australian community at a local, state or national level.
- Seek funding for your personal development and learning.
- Be able to demonstrate support from the community that your initiative is seeking to benefit.
- Be able to demonstrate that your proposed personal development will directly benefit your ability to deliver and lead your initiative.
- Be able to demonstrate how your initiative is an innovative approach to the social problem you are trying solve.
- Be able to provide contact details for a community referee and an expert referee who are familiar with your work and will support your Fellowship application.
- Be able to complete the Fellowship in 2022

*Note only one individual per organisation can receive a Westpac Social Change Fellowship in each application year if the organisation has less than fifty employees.*

## 5. Application Form

All applications must be submitted through Westpac Scholars online application system. This can be accessed via the Social Change Fellowship page on our web site. You will be prompted to complete an eligibility survey before commencing your application.

<https://scholars.westpacgroup.com.au/scholarships/social-change-fellowship/>

In addition to the application questions the following supporting information is required as part of the online application:

- A CV of no more than three pages and a PDF file
- A picture of yourself (headshot) no larger than 2MB as a jpg or png file
- Contact details for a Community Referee who is familiar with your work in the community you are looking to impact and who can comment on your suitability for this Fellowship; and
- Contact details for an Expert Referee who is familiar with your social change initiative and who can comment on the importance and relevance of your work in this field.

You may be required to present proof of citizenship or permanent residency at any time during the selection process.

## 6. Funding Exclusions

To ensure the Fellowship program meets its objectives, the following uses of funds are specifically excluded from the Fellowship:

- Funding of the actual initiative (i.e. delivery of projects, programs or salaries);
- Tertiary qualifications and/or long course fees (courses longer than 4 weeks in duration)
- Initiatives for the benefit of communities outside of Australia;
- Initiatives that promote religion, animal welfare or change in law, government policy or practice are not eligible;
- Medical research; and
- Capital items, refurbishments, sponsorships or fundraising activities.

## 7. Fellowship Funding

Funding requested must be used to carry out a development plan to build the capability, knowledge and networks of the individual aligned with clearly articulated development objectives.

Your Fellowship must not include costs directly related to running your social change initiative or delivering projects.

If your application is successful, the Fellowship will provide you with \$20,000 - \$50,000 in funding. The final funding amount depends on your proposed development plan and will be approved by the CEO of the Westpac Scholars Trust prior to Fellowship Agreements being executed.

Funding is provided to the individual, not the organisation. Please note that all successful applicants will be subject to criminal record checks.

## 8. Development Plan and Exclusions

The Westpac Social Change Fellowship, and all approved development activities, must be completed in the year of the award, unless otherwise agreed by the Trust. In addition:

- Development Plans will include the Group Leadership Development Program which is a requirement of the Fellowship.

- Development Plans can include short training programs (up to 4 weeks in duration) and must not exceed \$20,000 AUD for an individual course.
- Can include international and/or domestic study tours for the purpose of research to refine/develop your initiative and create networks to grow your capability to lead social change.
- Evidence that the community impacted by your initiative will provide you with support/guidance throughout your fellowship will be highly regarded.
- Applicant may be eligible for a Salary Allowance, this will be determined in accordance to the Westpac Scholars Salary Allowance policy.
- Funding is not to be used for longer formal higher education courses to gain qualifications.
- Whilst overseas travel is supported, travel to countries with a Level 3 (reconsider your need to travel) or 4 (do not travel) rating by the Australian Department of Foreign Affairs and Trade is to be excluded from development plans.
- Where necessary, international travel can be undertaken as part of the Fellowship Development Plan and will be approved by the CEO of the Westpac Scholars Trust. International travel must not exceed a total eight weeks as part of the Fellowship and can be done in up to two trips.
- The Trust will fund medical and travel insurance for the Recipient out of the Final Amount. The recipient must arrange and provide certificates of insurance to the Trust prior to receiving Fellowship funds.
- Travel to destinations other than those specified in the detailed Development Plan will be regarded as personal travel and will not constitute part of the Fellowship. Any such additional travel costs will be at the Recipient's own expense.

Successful Fellows will be notified in February 2022. Upon award of the Westpac Social Change Fellowship, the Westpac Scholars Trust will collaborate with recipients to finalise their development plans and budget.

## **9. Reporting Requirements**

Fellows will be required to submit a Report to the Westpac Scholars Trust within three months of completing their Fellowship. A guide will be provided around the structure of this report.

## **10. Selection Process & Key Dates**

Applications open on 18<sup>th</sup> August 2021 and close on 30<sup>th</sup> September 2021 at 5:00PM AEST.

Applications go through Eligibility & Quality Screening. From here the top 50 applications from around Australia are shortlisted for the Regional Selection Panels. Finalists who reach the Regional Panel stage will be invited to complete a video interview late October.

Following the Regional Panels, 16 national finalists will be shortlisted and will be invited to Sydney for an interview with the National Selection Panel on Thursday 24<sup>th</sup> February 2022 (the Westpac Scholars Trust will cover domestic travel costs for the National Panel finalists).

Successful Fellows will be notified late February 2022 following the approval of the Westpac Scholars Trust Board.

## 11. Westpac Social Change Fellow Attributes

The Westpac Scholars Trust is looking for people who possess the following attributes. This is a comprehensive list and successful candidates may not have all of these. Applicants will be assessed on the demonstration of these attributes throughout the selection process.

Attribute	Description
<b>Collaboration &amp; Openness</b>	<ul style="list-style-type: none"> <li>Leads collaboration and proactively establishes meaningful connections and partnerships with others;</li> <li>Encourages positive relationships and remains open to the diverse views of others, willing and able to work with people from diverse backgrounds;</li> <li>Open to feedback, input and advice from others, even if contrary to own views;</li> <li>Shares successes, learning and failures, actively shares information in order to progress own and others' goals;</li> <li>Is open about plans, ideas and progress and inspires others</li> </ul>
<b>Self &amp; Situational Awareness</b>	<ul style="list-style-type: none"> <li>Understands own strengths and weaknesses and their impact on others;</li> <li>Insightful, reflective and willing to accept feedback and suggestions;</li> <li>Has a good sense of own behaviour and recognises own limitations.</li> </ul>
<b>Resilience</b>	<ul style="list-style-type: none"> <li>Remains positive and focused when faced with setbacks and obstacles;</li> <li>Accepts failures and bounces back quickly in order to progress thinking and outcomes;</li> <li>Confident to take on challenges and to think differently from others</li> </ul>
<b>Initiative &amp; Drive</b>	<ul style="list-style-type: none"> <li>Proactive and willing to take action to progress work and pursue better outcomes;</li> <li>Inspired to seize opportunities and work hard to deliver purposeful outcomes within chosen area;</li> <li>Committed to making progress, 'backs self' to make decisions and take next steps; Self-motivated and committed to long-term goals;</li> <li>Committed to long-term vision and goals, doesn't get caught up in short-term distractions.</li> </ul>
<b>Leading Change &amp; Dealing with Complexity</b>	<ul style="list-style-type: none"> <li>Shows courage and takes responsibility to lead initiatives and change;</li> <li>Comfortable with ambiguity and navigating complex and sensitive situations and information, where the pathway or answer may be unclear;</li> <li>Supports others through complexity and change;</li> <li>Seeks to understand problems and barriers to success, and works through practical solutions;</li> <li>Willing to change course and direction, and remain flexible to shift plans when faced with new and changing situations</li> </ul>
<b>Planning &amp; Judgement</b>	<ul style="list-style-type: none"> <li>Plans ahead, sets goals and has a good sense of what needs to be done to progress work;</li> <li>Balances planning with action, tolerating a level of risk whilst ensuring that consequences and other considerations are taken into account when making decisions;</li> <li>Comfortable juggling multiple priorities has a good sense of what's important and what will have the biggest impact.</li> </ul>
<b>Communication</b>	<ul style="list-style-type: none"> <li>Effectively communicates with others and articulates key messages;</li> <li>Listens attentively, shows patience and seeks to understand and relate to others;</li> <li>Puts forward a compelling and articulate story in order to bring others along.</li> </ul>

## Frequently Asked Questions

### 1. What is a Westpac Social Change Fellowship?

The Westpac Social Change Fellowship supports the development of individuals who have the vision and commitment to shape a better future for Australians. Each year up to ten Fellowships, worth up to \$50,000, are awarded to those candidates who are leading an initiative that tackles one of the Australia's social issues.

The Fellowship is unique in that it invests in the professional development of an individual. The award is designed to give recipients the time and space to develop the skills, knowledge and networks to accelerate their growth as a social innovator. This may involve engaging with global thought leaders and industry experts, training, mentoring and building stronger connections that will directly enhance your ability to lead social change.

### 2. How many Fellowships will be awarded each year?

There will be up to 10 Fellowships awarded each year.

### 3. What is the value of each Fellowship and who receives the funds?

The Fellowship will provide an individual with up to \$50,000 in funding. The value will vary depending on the applicant's proposed Development Plan. The funds are provided directly to the Fellow for their Development Plan.

### 4. What is the duration of the Fellowship?

The duration will depend on the proposed Fellowship Development Plan. The Development Plan may be conducted on a part time or full-time basis. Overseas travel must not exceed 8 weeks in total (and may be completed in up to two trips).

### 5. Who can apply?

We are looking for people from all walks of life, who are committed to making a difference and are eager to build on their own capabilities so they can maximise their potential to bring their initiative to life. To be eligible to apply, applicants must be:

- An Australian Citizen or Permanent Resident;
- Over the age of 18; and
- Be leading an existing innovative initiative to address a clearly defined social need in an Australian community at a local, state or national level.

### 6. Do I have to be a Not-for-Profit?

No, the Social Change Fellowship is open to individuals across any sector leading a program that improves the wellbeing of Australians. The Fellowship is awarded to the individual not the organisation.

### 7. If your organisation was co-founded with another person is it still ok to apply as an individual?

Yes. And if both individuals wish to apply for the Social Change Fellowship then each will need to submit a separate application and progress through the selection process on the merits of their individual application – as this is an investment in the individual, not the organisation.

To note, one individual per organisation can receive a Westpac Social Change Fellowship in each application year if the organisation has less than fifty employees and we strongly encourage leaders from the same organisation to not apply in the same year where possible.

### 8. What kind of initiative do I need to be working on to qualify for a Fellowship?

Your initiative must be an innovative approach to address a clearly defined social need in an Australian community at a local, state or national level.

The following initiatives and uses of funds are specifically excluded from the Fellowship:

- Initiatives for the benefit of communities outside of Australia;
- Tertiary qualifications and/or course fees;
- Initiatives that promote religion, animal welfare or change in law, government policy or practice are not eligible;
- Medical research; and
- Funding of the actual initiative, capital items, refurbishments, organisations, sponsorships, salaries or fundraising activities.

**9. Do you provide funding for initiatives?**

No. The Fellowship provides funding only to individuals for personal development and learning. The Fellowship funding cannot be used for program delivery.

If you are looking for funding for your initiative please explore other Foundation's in the Westpac Group – Westpac Foundation, St George Foundation, BankSA Foundation and Bank of Melbourne Neighbourhood Fund.

**10. Do I need to have started work on my initiative?**

Yes, your initiative needs to be more than just an 'idea'. You need to be able to demonstrate a clear understanding of the social problem you are trying to solve and that you have engaged and obtained the support of the community benefiting from your initiative. You should've already launched your initiative and have seen its impact in the community.

**11. Can I use the funds to gain overseas work experience?**

Yes, if the overseas experience will directly support the development of capabilities required to deliver your initiative in Australia.

**12. Can I submit more than one application in a year?**

An applicant may only submit one application per year.

**13. If successful, can I defer the Fellowship?**

No. Successful recipients will be notified in February 2022 and Westpac Scholars Trust will work with finalists to finalise their Development Plan.

**14. Can I apply in the future if I am unsuccessful?**

As long as you meet the eligibility criteria you can apply for a Westpac Social Change Fellowship in future years, but we do encourage you to seek feedback before reapplying. Also consider if you are applying for the Fellowship at an opportune time in your development and the growth of your social change initiative.

**15. Do I, or the people who benefit from my initiative, need to be a Westpac customer?**

No, provided you meet the eligibility criteria, we welcome applications from people from all walks of life working on initiatives that benefit Australian communities.

**16. Do I need academic qualifications to apply for a Fellowship?**

No, the Westpac Social Change Fellowship is not associated with academic pursuit.

**17. My initiative supports communities overseas. Am I eligible to apply for a Westpac Social Change Fellowship?**

No, your initiative needs to strengthen communities and help people in need in Australia.

**18. Can I use the Fellowship to cover (or partially cover) the course costs at a University or educational institution?**

No. Funding will not be provided for tertiary qualifications or tertiary courses.

**19. How do I complete my proposed Fellowship Plan and budget?**

The Westpac Social Change Fellowship provides funding to support educational experiences that directly invest in your skills, capabilities and networks. Your Fellowship experience may involve travel, study tours, work experience, research, short courses or building stronger connections (including meetings, networking and stakeholder engagement).

The value of your proposed Fellowship experience may range from \$20,000 - \$50,000. You will be requested to submit initial Fellowship Plan ideas with your written application – please spend time thinking through what your key development objectives are and how the proposed activities address these.

We will collaborate with individuals who are shortlisted for the Fellowship on a detailed budget – a budget is not required in the initial application. Although when proposing courses or activities in your application please keep in mind the maximum funding allocation amount.

Applicants who reach the National Panel stage will also receive coaching from a previous Fellow to help guide the development of their Fellowship Plan. If your application is successful, the Westpac Scholars Trust will work with you to prepare a detailed costing of your itinerary prior to your Fellowship Agreement being finalised.

**20. Are there any countries that cannot be included in a Fellowship Development Plan?**

Travel to countries with a Level 3 (Reconsider your need to travel) or Level 4 (Do not travel) rating by the Australian Department of Foreign Affairs and Trade are not to be included in a Development Plan. Countries Alert Levels are listed on the smartraveller.gov.au website: <http://www.smartraveller.gov.au>

**21. Will Westpac Scholars Trust provide Fellows with taxation advice?**

Fellows are responsible and encouraged to seek taxation advice regarding their individual circumstances. Westpac Scholars Trust makes no representation or warranty in relation to the taxation implications of any funds provided by the Foundation to a Fellow.

**22. Will Westpac Scholars Trust provide Fellows with travel insurance?**

Westpac Scholars Trust will cover Travel Insurance for the duration of the Fellowship.

**23. Will the Westpac Social Change Fellowship cover travel for my spouse, partner or dependent(s)?**

No. Fellowship funding will only cover costs for the Fellow.

**24. Is there a Salary Allowance whilst on the Fellowship?**

In the event that you expect to lose at least 50% of your total household gross family income while you are away you may be eligible for a Salary Allowance. This amount will be payable to you directly and included in the total value of your Fellowship. Please review our Salary Allowance Policy. The Salary Allowance is generally provided for the portion of the Fellowship you are travelling internationally.

**25. Can the funds be allocated to personal expenses occurred as a result of attending a course e.g. childcare?**



Yes, funds can be used to cover some personal expenses such as childcare if you are travelling or attending a course as part of your Fellowship. We can discuss this on a case by case basis with successful finalists.

**26. When can I apply and when do applications close?**

Applications open on 18<sup>th</sup> August 2021 and close on 30<sup>th</sup> September 2021 at 5:00PM AEST.

**27. How do I apply?**

All applications must be submitted through Westpac Scholars Trust online application system to be considered valid. This online system is accessed via the Westpac Social Change Fellowship webpage.

Before submitting your application please ensure you have checked your answers and supporting documents as applications cannot be re-submitted or amended after submission.

**28. What supporting information is required?**

Applications received without the below supporting information, will not be considered by the Westpac Scholars Trust.

- Your current Curriculum Vitae so that we understand your capabilities, experience and achievements (up to 3 pages as a PDF)
- A picture of yourself (headshot) in JPEG or PNG format no larger than 2MB
- Contact details for a Community Referee who is familiar with your work in the community you are looking to impact and who can comment your suitability for this Fellowship.
- Contact details for an Expert Referee who is familiar with your social change initiative and who can comment on the importance and relevance of your work in this field.

**29. What is required to be a strong applicant?**

You must be able demonstrate:

- Why your initiative is an innovative approach to the social issue you are seeking to address;
- The support of the community that will directly benefit from your idea;
- That you have the commitment to deliver the initiative;
- How your Development Plan, funded by the Fellowship, will build your capability to deliver your initiative.

**30. What makes a good application?**

A good application takes time to develop. Please be aware many of the sections have specified word limits. A number of questions also contain guidance to assist you in formulating your response.

**31. What could be some common reasons for unsuccessful applications?**

- The application does not fall within our eligibility criteria.
- The applicant did not effectively demonstrate their ability to lead social change.
- It is not clear as to the social need you are seeking to address.
- It is unclear how your initiative will address the social need.
- There is a lack of evidence of community support for your initiative.
- The request is to fund a project, organisation, sponsorship, capital works or major equipment.
- The application form is incomplete or has been completed incorrectly.
- You have not been able to articulate why now is the right time for you to undertake a Fellowship to enhance your development to be a social change leader.

**32. How do I know if the Westpac Scholars Trust has received my application?**

Once you have submitted your online application, you will receive an acknowledgement email confirming that your application has been received – please check that our emails are not going to spam.

**33. When will applicants find out if they are successful?**

Applicants will be notified as they progress through the selection process:

- Applicants who reach the Regional Panel stage will be notified late October and will be invited to complete a video interview. All other applicants will be notified at this point also.
- Applicants who progress to the National Panel will be notified in early December. The 16 finalists who reach the National Panel will be invited to Sydney for a face-to-face interview on Thursday 24<sup>th</sup> February 2022 – Westpac Scholars Trust will cover domestic travel costs associated with the National Panel.
- Finalists will be notified following the National Panel after approval of the Westpac Scholars Trust Board.

**34. I missed the application window, can I still apply?**

No, late applications will not be accepted, please consider applying in future years.

**35. Can I get feedback on my application if I am unsuccessful?**

Unfortunately Westpac Scholars Trust is unable to provide individual feedback due to the volume of applications we receive – top level themes will be provided as to why applications did not progress.

Applicants who reach the Regional and National Selection Panel stage will receive personalised feedback.

**36. If unsuccessful in this round, can I apply in the future?**

Yes, you can apply for the Social Change Fellowship in the future. We recommend you seek feedback on your application before reapplying.