

# Sponsorship program guidelines

For eligible organisations in our community

Prepared 9 January 2024

This assessment process has been designed to help organisations in our communities to apply for sponsorship funding.

## Introduction

Being part of Bendigo Bank is about being part of something bigger. While we provide excellent banking and financial services, we aim to give back to our community. By banking with Community Bank Leopold, our customers are also helping to support their communities through our sponsorship program.

Our community sponsorship program facilitates mutually beneficial partnerships with eligible organisations in our community.

## What is a sponsorship?

Community Bank Leopold sponsor events, projects, clubs or organisations through the provision of money, goods or services in return for opportunities for customer acquisition and brand recognition.

Our sponsorships typically provide a tangible benefit to both the recipient (which benefits through receiving material support) and the sponsor (which benefits via enhanced public image and access to a wider audience). The recipient is required to provide some service back to the sponsor and this will be noted in a Sponsorship Agreement.

Note:

- Charitable donations are not sponsorships. Please talk to us about whether these may qualify via our grants program.
- Direct advertising is not considered a sponsorship.
- We sponsor organisations only and not individuals

## Sponsorship program objectives

The objectives of our sponsorship program are to:

- Support our local clubs and organisations
- Promote Community Bank Leopold and increase brand recognition
- Encourage customer acquisition

All sponsorship arrangements will require a Sponsorship Agreement to be signed and will include but not limited to the promotion of Community Bank Leopold through:

- signage at the event or ground
- opportunity to speak to members at an event
- regular social media posts and newsletter inclusions
- website noting our support
- the provision of photos of the event, club or organisation with a statement of support and authorisation to use such materials in our own promotional activities

## Key dates

Our sponsorship program is open all year round.

You must submit your sponsorship applications at least 6 weeks before an event or season commences to allow for it to be effectively activated/leveraged.

## Eligibility

To be eligible for a sponsorship program, you must meet the eligibility criteria.

- Be a club or organisation located in Leopold or district
- Be a current Community Bank Leopold customer
- Not have any other sponsors who are financial institutions. This includes banks, brokers, insurance providers etc.
- Sponsored initiatives must be located in Leopold and surrounding districts
- Sponsored initiatives must deliver clear business acquisition outcomes for Community Bank Leopold.

## Ineligible entities

The following entities are ineligible for funding:

- Individuals or unincorporated organisations without an eligible project partner
- For-profit organisations
- Applicant organisations which have an unsatisfactory result to an 'Anti Money Laundering/Know Your Customer' search
- Applicants who have not met previous sponsorship agreements acquittals

## Ineligible projects

We won't sponsor organisations or projects that:

- Do not fit with our values and objectives
- Are also sponsored by a competitor financial institution e.g. banks, brokers, insurance providers
- do not deliver clear business acquisition outcomes for Community Bank Leopold.

We will not sponsor any initiatives which:

- take place outside of Leopold or its surrounding districts
- are illegal, attempt to change the law or direct political donations
- claim retrospective funding – paying for costs already incurred
- involve gambling
- exclude or offend any part of the community
- encourage violence or involve the use of weapons
- mistreat, exploit, or harm animals
- create environmental hazards
- present a danger to public health or safety
- contribute to modern slavery

## Assessment

We will assess your application against our sponsorship criteria.

### Objectives (5%)

- The extent to which the proposed initiative aligns with the Community Bank Leopold's vision, values and objectives.
- The potential for community benefit.

## Feasibility (40%)

- There is adequate lead time for the sponsorship to be effectively activated/leveraged.
- The initiative is realistic and achievable (eg timeframes).
- The required permits/insurances are in place.
- The extent that the applicant has demonstrated clear, realistic and measurable project goals and objectives for the defined audience.
- The extent that the applicant has demonstrated capacity to deliver the proposed initiative (e.g. track record delivering similar projects, adequate resources and staff).

## Program activation potential (40%)

- Target markets and audience reach – who and how many people will the proposed sponsorship reach?
- Potential for the sponsorship to deliver business acquisition outcomes.
- Potential for the sponsorship to deliver increased brand awareness/recognition.
- The extent to which the proposed initiative aligns with our marketing objectives.
- Opportunities for our involvement in project/event.
- A clear demonstration of who the proposed initiative will reach.

## Value for money (15%)

- Sponsorship support requested versus benefits offered by applicant.

## How to apply

You should read and understand these guidelines before beginning your application.

You must use our application hub to complete and submit your online application.

Access our application hub here [Home Page - Community Bank Leopold \(smartygrants.com.au\)](http://smartygrants.com.au)

You must submit your sponsorship application at least 6 weeks prior to any proposed events or season commencing.

We will confirm receipt of your application submission via an email to your registered email address.

We may contact you during the assessment process to request more information, evidence or to clarify information provided in your grant application.

## Supporting documentation

You may be asked to provide the following supporting documentation in your application:

- A current bank statement for your organisation.
- Information/demographics about the proposed target audience and number of expected attendees/participants, including the results of any research undertaken to date (if applicable).
- Confirmation of all necessary licences, permits and insurances which will enable you to run your project/event (e.g. public liability insurance, local council permits).
- For projects involving children, confirmation that relevant personnel have Working With Children checks.
- Project budget details which clearly show how you will spend the funds.
- Financial details about your organisation eg. recent annual report, audited financials, bank statements.

## Decisions on applications

Applications must be received by third Friday of the month and at least 6 weeks prior to the event or commencement of a season. No applications are considered during December. Applications will be considered by the Board on the last Monday of the month and applicants will be notified of the outcome within 7 days of board meeting. Sponsorship funding will be released shortly after.

## Managing your sponsorship

### Keeping us informed

You must notify us about anything which is likely to impact your organisation or its ability to deliver your project. This may include, but is not limited to, changes to your organisation's name, address, financial situation, senior staffing arrangements, or significant changes to the project initiative.

You must also notify us if:

- any other parties become sponsors of the event
- you are planning any other initiatives in addition to the sponsored event
- if you become aware of any incident that has the potential to damage the reputation or image of the Sponsored Party, the Sponsored Events, the Sponsor, any Related Company of the Sponsor or Sponsored Party (Notifiable Conduct). More information is provided in our funding agreements.

### Sponsorship agreement variations

We understand that circumstances change, and things don't always go to according to plan. If there has been a change that will impact your project, you can request a variation to your sponsorship agreement by contacting us.

We will consider your request, and if we decide to accept your proposed changes, we will issue a deed of variation for your signature.

### Reporting requirements

You will be required to complete a sponsorship acquittal form within eight weeks of your nominated sponsorship end date. The acquittal report must be submitted electronically through the application hub with additional requirements submitted directly to the Executive Officer of Community Bank Leopold.

The report includes information about how the funds were spent, the benefits delivered, participant/recipient information, achievements of the project, and any lessons learned.

You should identify key internal stakeholders who will be responsible for collecting and reporting data from before, during and after your initiative.

### Privacy information

[View our privacy policy.](#)

## Enquiries

### **Application queries**

Bronwyn Shearer (Executive Officer)

Phone: 0418 348 562

Email: [bendigoleopold@gmail.com](mailto:bendigoleopold@gmail.com)

### **For technical support with application hub**

SmartyGrants–Our Community

Phone: 03 9320 6888

Email: [service@smartygrants.com.au](mailto:service@smartygrants.com.au)