



Byford & Districts **Community Bank®** Branch

Sponsorship Policy (p1)

Please read these guidelines before you complete the application form.

General Information

Byford & Districts **Community Bank®** Branch is a community owned company and is committed to benefiting the local communities of the Serpentine/Jarrahdale Shire. It is with great pleasure that we are able to assist local groups with sponsorship/grant funds. Byford & Districts **Community Bank®** Branch opened in 2005 and have contributed more than \$1.2 million back into the community since inception.

To enable us to help our communities, we need the support of individuals and businesses within our business catchment – they do their banking with us and we contribute back to *their* community. Your organisation and members are able to help us in “growing our business” to ensure our continued support of local groups and organisations.

Objectives

1. To grow a business that supports our community and to encourage a vibrant and sustainable community that supports our business
2. To distribute part of the bank's profits in the form of Donations, Sponsorships and Minor Grants
3. To provide financial assistance to:
 - Carry out projects that benefit our local community
 - Encourage community participation in activities that build a sense of community
 - Improve the standards of living in recreation, education and entertainment for residents within the Shire of Serpentine/Jarrahdale
 - Assist members of the community in need
4. Create a positive Bendigo Bank brand association with new and existing members/customers within our community

Eligibility

1. That you and/or your group, organisation and members currently, or will in the future actively support and promote the Banking services provided by Byford & Districts **Community Bank®** Branch.
2. That at least 50% of your group or organisations members reside in the Serpentine/Jarrahdale Shire

Types of Projects that ***WILL NOT be*** considered for funding

Funds are not available for:

1. Events which have already commenced or have been completed
2. Organisations that have not fulfilled the Board's requirements for previous funding
3. Support for political organisations
4. Events that promote alcohol, drugs, gambling or animal cruelty
5. The Board has the discretion to exclude certain events and/or requests if deemed contravening to the Bendigo and Adelaide Bank Sponsorship Policy



Sponsorship Policy Cont. (p2)

Funding

The Byford & Districts **Community Bank**[®] have allocated money for three funding rounds a year plus one foundation round per year. Information about when each round will commence and conclude is available from the Byford & Districts **Community Bank**[®] Branch.

Assessment Process

Each application needs to be into the Byford & Districts **Community Bank**[®] Branch before the close of each round. All applications will then be assessed by the Boards Marketing and Sponsorship Team against a certain criterion. A recommendation will then be put forward by the Boards Marketing and Sponsorship Team to the Board of Directors where a final decision on the application will be made.

Those applications demonstrating strong customer support will receive favourable consideration by the Board. Our Shareholders will not condone our Bank Board providing Sponsorship to organisations, groups or person/s that do not support our **Community Bank**[®].

Exclusivity Clause

Applicants seeking funds from Byford & Districts **Community Bank**[®] Branch will not approach other financial institutions, mortgage brokers or similar competitor businesses for sponsorship and will not advertise these competitors through their organisation. Byford & Districts **Community Bank**[®] Branch does however reserve the right to consider each individual case on its merits and can make exceptions to this clause if the applicant can provide grounds why this clause should not apply.

Final Acquittal Requirements

Funding will be available over a set period of time which will be determined at the acceptance of the proposal. The Branch's Board will require exposure of our brand through advertising or promotion of Bendigo Bank approved products. To progress our policy, we would expect each successful applicant to support and promote customers to our Bank. At the completion of the project, an acquittal report must be supplied to the Byford & Districts **Community Bank**[®] Branch within 3 months of receipt of sponsorship funds to meet our audit requirements.

Further Information

For further information, please come into the Byford & Districts **Community Bank**[®] Branch or contact our Community Liaison Officer Margaret Eakin
Email: Margaret.eakin@bendigoadelaide.com.au
Phone: 08 9525 0879



Sponsorship Application Form (p3)

Organisation Information

Applicant Information

1. Organisation Name: _____
2. Registered Business Name (If Different from Above): _____
3. A.B.N: _____
4. Are You Registered For G.S.T? YES NO
5. Is Your Organisation Incorporated? YES NO
6. ATO Endorsements
 - a. Deductible Gift Recipient YES NO
 - b. Tax Concession Charity YES NO
7. Banking Details

Name of Account: _____

BSB: _____ - _____

Account Number: _____

Organisation Address

8. Street Address: _____
 Suburb: _____
 State: _____ Postcode: _____
9. Postal Address (If Different from Above): _____
 Suburb: _____
 State: _____ Postcode: _____

Contact Details

10. Primary Contact Details

Title: _____ First Name: _____ Surname: _____
 Phone (Daytime): (____) _____ Phone (Mobile): _____
 Email: _____@_____ Position: _____

11. Secondary Contact Details

Title: _____ First Name: _____ Surname: _____
 Phone (Daytime): (____) _____ Phone (Mobile): _____
 Email: _____@_____ Position: _____



Sponsorship Application Form (p4)

12. Please provide details of the organisation you represent, including what you do, how many members you have, do the members pay a membership (if so how much) and the aims of the organisation?

13. What is the residential spread of the members in your organisation?
(i.e. 50% live inside the Serpentine/Jarrahdale Shire)

Project Information

The following information is about the project for your sponsorship request

14. **Project Title/Name:** _____

15. **Project Description** (What do you need the money for? Describe your project):

16. **Outline the primary objectives of the project and the needs of the community to be targeted.**

17. **Outline the community groups and/or community members that will benefit from your project.**

18. **Approximately how many people will benefit from your project? (e.g. 5, 20, 50)** _____

19. **Sponsorship Amount Requested (inc. GST): \$** _____

20. **What is the start and end date of the project?**

Start Date: ____ / ____ / ____

End Date: ____ / ____ / ____



Sponsorship Application Form (p5)

21. Project Budget

Please provide budget details, ensuring all applicable fields are completed

Income

BDCB Funding Requested	\$ _____	Description of Income received/requested other than BDCB:
Other Funding Received	\$ _____	_____
Other Funding Requested	\$ _____	_____
Own Contribution	\$ _____	_____
In-Kind Support	\$ _____	_____
Other	\$ _____	_____
Total Income	\$ _____	_____

History with Byford & Districts Community Bank

22. Does your organisation bank with the Byford & Districts **Community Bank**? YES NO
(Consideration will be given to those who bank with us)

23. If 'no', why doesn't your organisation bank with the Byford & Districts **Community Bank**?

24. Did you know that by banking with a **Community Bank** branch, you enable the bank to invest more money into your community? YES NO

25. If 'no', would you like to know more about how your banking can help your community? YES NO

26. What does your organisation currently do for the Byford & Districts **Community Bank**? (Please tick)

- Bank with Us
- Promote the Bank Regularly at Events
- Promote the Bank on Social Media Account(s)
- Other _____

27. What do you love about your **Community Bank**? (Please provide quotes, pictures and/or videos)

28. Has your organisation received funding from Byford & Districts **Community Bank** Branch or any branch of the Bendigo Bank previously? If so please provide details going back a maximum of 5 years:

Date of Previous Funding: _____ / _____ / _____	Amount: _____	Project: _____
Date of Previous Funding: _____ / _____ / _____	Amount: _____	Project: _____
Date of Previous Funding: _____ / _____ / _____	Amount: _____	Project: _____
Date of Previous Funding: _____ / _____ / _____	Amount: _____	Project: _____
Date of Previous Funding: _____ / _____ / _____	Amount: _____	Project: _____
Date of Previous Funding: _____ / _____ / _____	Amount: _____	Project: _____



Sponsorship Application Form (p6)

Board Requirements

The board recognises that we are a business first and that without the continued support from the community we would not be able to support the community groups that we do. Therefore, it is important to us that those we sponsor actively promote the bank to create new business.

29. What can/will your organisation do for us from now on? (Please tick)

- Bank with Us
- Promote the Bank regularly at events (Including displaying signs and banners)
- Naming rights at event(s)
- Promote the Bank on social media account(s)
- Allow Bank representatives to speak to your members about banking opportunities
- Actively promote banking with Bendigo Bank to all members and their families
- Provide videos and photographs of your organisation supporting the Bank
- Other _____

30. Do you have any addition comments/information/questions you would like to share with us?

Supporting Documentation

Please ensure you have attached or completed:

- Financial Statements (audited if available)
- Copy of ABN registration
- Quotations, plans and other relevant document
- Any other relevant information (e.g. reports, promotional materials, letters)

If your organisation does not have an ABN, an intermediary organisation, which is prepared to administer your sponsorship is necessary.

Please provide a signed letter of support and a copy of the organisation's endorsements.



Sponsorship Application Form (p7)

Declaration

In signing this application form I:

1. Acknowledge and understand that all applications become the property of Byford & Districts **Community Bank**[®] Branch
2. Agree that Byford & Districts **Community Bank**[®] Branch may provide this application to other potential funding sources
3. Agree to inform Byford & Districts **Community Bank**[®] Branch if the organisation has a significant change to its financial situation
4. Agree for Byford & Districts **Community Bank**[®] Branch to publish the results of grants funded
5. Have provided a copy of my organisations latest financial statements with this application
6. Have provided a copy of the organisation's certificate of incorporation or ABN
7. Permit a representative of Byford & Districts **Community Bank**[®] Branch to monitor the progress of the project
8. Permit Byford & Districts **Community Bank**[®] Branch access to your membership list for marketing purposes
9. My organisation will issue a tax invoice for the sponsorship provided if the organisation is registered for GST
10. Will, where possible, provide an invoice from the supplier to the Byford & Districts **Community Bank**[®] Branch for payment, up to the amount of sponsorship provided if the organisation is not registered for GST
11. Will, wherever possible, acknowledge Byford & Districts **Community Bank**[®] Branch sponsorship of the project
12. Will, wherever possible, acknowledge Byford & Districts **Community Bank**[®] Branch sponsorship of the project in member communication (newsletter etc) and during meetings of members
13. Will provide a written report to Byford & Districts **Community Bank**[®] Branch on the progress of and at the conclusion of your project
14. Am authorised to sign this application on behalf of the organisation

Signature: _____

Date: ____ / ____ / ____



Privacy Statement (p8)

Bendigo and Adelaide Bank Limited is part of the Bendigo and Adelaide Bank Group (the Group / we). We collect your personal information to help process your application. Unless you advise us otherwise we will also provide you with offers and information related to our products and services. We may share your personal information with third parties, related companies in the Group, and our joint venture partners and franchisees so that you can be told about financial products and services offered or distributed by them. We may also need to disclose your personal information to organisations that carry out functions on the Group's behalf ("service providers") such as mailing houses, plastic card bureaux, rewards program managers, IT service providers, lawyers, collection agents and advisors acting for the Group, insurers, other credit providers and credit reporting agencies. If you do not wish to receive any marketing material from us please call us on 1300 361 911.

If any part of your information is not provided Bendigo Bank may not be able to process your application. We may use your personal information to confirm your details (for example contacting your employer to confirm your employment and income details). We treat this as confidential and only disclose it to others where necessary.

Some of the organisations we disclose your personal information to may be located overseas. Where an organisation is located overseas we will either take reasonable steps to ensure that it complies with Australian privacy laws or we will seek your consent to the disclosure. If you need to gain access to and seek correction of your personal information and credit-related personal information please contact us on 1300 361 911.

You should read our Privacy Policy which contains information about: a. how you can access and seek correction of your personal information; b. how you can complain about a breach of the privacy laws by us and how we will deal with a complaint; c. if we will disclose personal information to overseas entities, and where practicable, which countries those recipients are located in. Our Privacy Policy is available on our website www.bendigobank.com.au or by telephoning 1300 361 911.