

Policy: Sponsorship/Community Partnerships, grants and donations

Daylesford District Community Developments Limited (DDCDL) will provide financial assistance to worthwhile initiatives that support the Daylesford District Community and promotes the Community Bank Daylesford District (CBDD).

Terminology

Daylesford District means the communities of the Hepburn Shire with due respect to the geographical areas within which the other Community Banks operate within the Shire.

Sponsorship/Community Partnership is recognised as the purchase of tangible potential rights and benefits associated with an event, entrant or organisation, which results in increased brand awareness, communication of key messages and an increased customer base.

Sponsorship/Community Partnership is:

- Purchased to increase awareness of CBDD's brand and/or products and services, and to provide a financial return to CBDD by increasing the customer/business base.
- Used to enhance DDCDL's key message as a community-based organisation, to improve DDCDL's image within the broader community and to maintain or develop further relationships with communities, groups and individuals.

Grant is a sum of money provided to an organisation or individual for a specific purpose.

Contra (value or goods in kind) is where CBDD's products or services are provided in lieu of, or as well as, cash for the payment of a sponsorship/partnership.

Donation is money given with no specific benefits to DDCDL or CBDD required.

Marketing/Advertising is a communications-based process which aims to positively influence individual and community perceptions about Bendigo Bank brands.

Market Development Fund (MDF) is the non-contractual contribution to the Company by Bendigo Bank through monthly Profit Share Statements. Its purpose is to build market presence and awareness.

Procedures:

Daylesford District Community Developments Limited will organise a Community Consultation Forum every two years. The Forum will provide significant guidance to the DDCDL Board in setting the funding priorities for community investment funds for the following two financial years.

Sponsorship/Community Partnership, Grant & Donation

Eligibility to apply:

Incorporated Not-for-Profit organisations, community groups and individuals within the Daylesford District will be eligible to make application.

- Applicants for Sponsorship/Community Partnership are required to authorise CBDD to provide details of the banking connection and are to use CBDD for its/their banking needs.
- Long-term sponsorship/partnership arrangements may be entered into but will be reassessed annually and may be terminated if the terms of the sponsorship/partnership are not being adhered to.

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- Applicants for Grants are to be encouraged to use CBDD for its/their banking needs.
- All Applicants will be expected to enter into the spirit of partnership with CBDD.
- Sponsorships/Partnerships, Grants and Donations must accord with Bendigo Bank's corporate image and identity as a community-based organisation, group or individual.
- CBDD Staff and their families are eligible to apply for sponsorships/partnerships, grants and donations on behalf of community organisations of which they are members. Where a staff member or a Director is a participant on a board or committee of an organisation seeking sponsorship/partnership, grants or donations this person is to absent themselves from any decision-making discussion regarding approval of the funding proposal.
- Sponsorships/Partnerships, Grants and Donations will only be provided to support legal activities that are considered acceptable by normal community standards.

Sponsorship/Partnership, Grants or Donations will not be provided for:

- Political purposes or to political organisations;
- Events or programs that denigrate, exclude or offend minority groups;
- Events associated with gambling;
- Events that create environmental hazards;
- Programs that may present a hazard to the community;
- Programs that do not reflect community standards;
- Programs sponsored by competitors. However, co-sponsorship/partnership with a competitor will be considered where the amount requested is \$500 or less;
- Initiatives with the potential to involve CBDD or Bendigo Bank in controversial issues that might expose CBDD or Bendigo Bank to adverse criticism will not be supported; or
- Events that re-distribute funds to other organisations.

Bendigo Bank reserves the final right of veto on all sponsorship proposals that will carry the Bendigo Bank name and/or logo.

Application Process

The Community Investment Committee meets regularly, and applications for Sponsorships/Partnerships can be submitted at any time. Applicants are encouraged to submit applications at least 6 weeks before funding is needed to allow time for Board approval.

Applications for Grants will be considered as they come to the attention of the Community Investment Committee.

Applications for Donations will be considered as required.

Applications must be submitted in writing to DDCDL's Community Investment Committee using the application form attached to this policy and should as a minimum include:

- The purpose for which the funds are required;
- A summary of the activity, event, project or program;
- The expected outcomes of the sponsorship/partnership or grant;
- The amount of funding sought and how this funding will be used;
- A timeline for the expenditure of the funding sought;

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- The financial contribution being made by the applicant itself and/or by other parties;
- The entitlement to any Government grants plus the details of any additional funding which may be available;
- Details of any reciprocal support the applicant is offering to CBDD; and
- Details of the ownership and management structure of the applicant and how the sponsorship/partnership or grant will be managed and by whom.

Process of managing successful sponsorships or grants

Sponsorships/Partnerships, Grants and Donations are to be funded and managed by DDCDL.

The DDCDL Community Investment Committee will receive and assess all Sponsorship/Partnership, Grant and Donation applications and make recommendations to the DDCDL Board of Directors for Board approval. In exceptional circumstances, where it is not practical to seek timely Board approval the Committee may seek approval from DDCDL's Chair for Sponsorships/Partnerships, Grants or Donations of up to \$1,000.

Any recommendation to the Board must be within the total annual amount budgeted for Sponsorships/Partnerships, Grants and Donations.

All Sponsorship/Partnership, Grant and Donation activity is to be reported on a monthly basis to the DDCDL Board and to the Community Bank State Support Centre for entry on the database.

Sponsorships/Partnerships, Grants and Donations with an investment value of \$5,000 or more must be discussed between the DDCDL Board and the Bendigo Bank State Support Centre to:

Highlight ways to generate greater sponsorship value;

Identify if the sponsorship has been successful to date and is worthwhile continuing; and

Analyse the actual business generated, the quality of the sponsor relationship, the contribution to brand exposure and opportunities for further networking opportunities. This analysis will utilise the Community Strengthening Index.

Where entertainment is a part of a sponsorship/partnership package with the value of \$2,000 and over, a register must be maintained by the Applicant, and supplied to DDCDL, of all persons attending the function for fringe benefit taxation purposes.

Annual Review

The successful applicants will be required to provide CBDD with an evaluation report on completion of the funded sponsorship/partnership or grant. The evaluation report will indicate how the funding was used and how successful each outcome was achieved or reasons why outcomes were not achieved.

The Community Investment Committee will evaluate all Sponsorships/Partnerships, Grants and Donations in April each year and report to the May Board meeting of DDCDL on their effectiveness and value to CBDD and to DDCDL.