

COMMUNITY BANK - MOUNT BARKER



Application for Community Investment

from _____
(your organisations name)

**to be received
23rd March 2020 to 1 May 2020**

Incomplete and late applications will not be accepted

*Please read the 'Sponsorship Guidelines' to assist
in completing your application*

*Submit your application by
Post – PO Box 117 Mount Barker WA 6324
Email – pcfs@westnet.com.au
By hand – 4 Short Street Mount Barker*

Proudly supporting our Community

Mount Barker Community Bank branch is proud to support our community through our sponsorship program. Like you, we have a strong emotional attachment to our community.

We love the idea that local people own the Mount Barker Community Bank branch and that by banking with us, profits earned are re-invested back into our Community. Decisions about where these profits are spent are made at this grass roots level. The amount of investment funds available to the community relates directly to the amount of business our locally owned Community Bank branch does.

Since opening in 2001 we have distributed more than \$1million back to the community. As the number of banking customers grows, so too does the capacity to invest in more organisations in the future.

Our funding pool is limited and requests for investments always exceed our available funds, so application are considered on their value to our community.

Please note for certain applications it is possible that a second application form will need to be completed to meet the requirements of our Community Enterprise Foundation.

What is Community Investment?

In general terms, a community investment is a partnership where funding is provided for a club or group that benefits both the local community and provides exposure and opportunities for the Mount Barker Community Bank branch to spread the word on how Community Banks differ from mainstream banks and directly benefit the local community.

Objectives

We look for community investments that are mutually beneficial. The funds we are able to distribute back to the local community relate directly to the success of our banking business. In other words, the more banking business we have, the more funds we can invest into our local community.

Mount Barker Community Bank branch offer a full suite of financial products like other banks BUT our big difference is that the majority of our profits stay right here in the Shire of Plantagenet.

Community Sponsorship Application 2020/2021

SECTION A

Applicant Information

Name of Organisation: _____

Postal Address: _____

Street Address (office or premises): _____

Contact Person

Name: _____

Position: _____

Telephone: _____ Mobile: _____

Email: _____

I, being the contact person listed above, acknowledge that the above organisation accepts the terms and conditions of the sponsorship, as outlined on page 5.

Is your organisation an incorporate body? Yes No

Are you registered for GST purposes? Yes No

If yes, please provide your ABN: _____

Does your organisation bank with the Bendigo Bank? Yes No

SECTION A – Continued

General Information about your Organisation

Describe the main purpose of your organisation and the services it provides:

Please provide membership numbers for the last 3 years:

2019 / 2020 - _____ 2018 / 2019 - _____ 2017 / 2018: _____

Do you have any other relevant information about your organisation?

Has the Mount Barker Community Bank branch previously provided a Community Sponsorship to your organisation? Yes No

If yes, please advise:

The date of last sponsorship: _____

The amount of last sponsorship: _____

Purpose of the last sponsorship:

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Details of how the Mount Barker Community Bank branch was acknowledged:

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SECTION B – Sponsorship Request

Please provide the following details

Reason for the Sponsorship

Benefits of project / who will benefit?

Management and Monitoring of Project

Name of Event / Project	
Date of Event / Project	
Location of Event / Project	
Total cost of Event / Project	
Amount of sponsorship requested \$ _____ inc / exc GST	

Please attach the following to this application:

- Any additional information that you believe will assist this application;
- A copy of the audited financial statements for your organisation for the last financial year is preferred. The minimum requirement is the organisations most recent profit and loss statement and balance sheet;
- Quotes etc that support dollar amounts of the project; and
- Plans or diagrams that easily illustrate your request, if applicable.

SECTION B - Continued

Estimated Project Costs & Funding Sources

Please specify and name source of funding and attach full details of expenditure, with supporting quotes if applicable.

Expenses

Equipment	\$	
Materials	\$	
Promotions	\$	
Consumables	\$	
Labour	\$	
Other	\$	
Total Expenses	\$	

Income

Amount requested from Community Bank	\$	
Own monetary contribution	\$	
Non-monetary contribution	\$	
Other Grants applied for / received	\$	
	\$	
Other	\$	
Total Income	\$	

*(Please list key components of your project, e.g. materials, promotions, value of in-kind contributions, fees, etc)

Please note that Total Income must equal Total Expenses

Details of other Financial Assistance Applied for

Have you applied or do you intend applying to any other funding body or community group for assistance with this project? Yes No

If yes please provide details: _____

SECTION C – Promotional Opportunities

Please indicate which of the following promotional opportunities are available to the Mount Barker Community Bank branch if your application is successful.

- Display or utilisation of advertising material at the event (at no cost*) including:
 - Marquee
 - Banners – Pull up or Tie up
 - Other

** Must be collected and returned to the Mount Barker branch unless otherwise advised*
 - Permanent signage at your premises.
 - Use of your organisation's name in conjunction with our advertising.
 - Use of photographs of your event / project for marketing purposes.
 - Attendance at your organisation's event / presentation by a Mount Barker Community Bank branch representative.
 - Provide a write up and photos (in digital format) on how your community sponsorship has been used and how it has benefited the community.
 - Other promotional opportunities (please detail below).
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SECTION D – Special Conditions for Applying for Sponsorship

- a. At least 60 days' notice of the event is required for all requests.
- b. All applications must be accompanied by a copy of your organisations minutes referring to this application or a letter of authority confirming the event/project.
- c. All outcomes of the requests will be notified in writing.
- d. A sponsorship report must be completed at the conclusion of your event and be received by Plantagenet Community Financial Services Ltd within 60 days of completion of the event / project.

SECTION E - Terms and Conditions upon Acceptant of Sponsorship

- 1. The sponsorship recipient may be required to complete and submit an acquittal to the Mount Barker Community Bank branch of the sponsorship provided. (i.e. A financial statement identifying all revenue and expenditure incurred on the project certified by the chairperson / president of the application or any other form, information or supporting original documentation as required by the Board).
- 2. Acknowledgement of the Mount Barker Community Bank branch's contribution must be made in an appropriate manner in a form acceptable to the branch. (i.e. The Mount Barker Community Bank branch expects to be noted as sponsor in any advertising or promotional material in relation to the funded project, if the project is a building or other similar physical structure a plaque to be mounted in recognition of the branch's contribution, signs erected in relation to the project to note the Mount Barker Community Bank branch as sponsor, etc.
- 3. The sponsorship recipient must use the sponsorship funds within the relevant sponsorship application financial year.
- 4. The sponsorship recipient will provide to the Mount Barker Community Bank branch the required tax invoice, if the sponsorship organisation is registered for GST purposes.

APPLICATION CHECKLIST

We are nearly there!

All applications must be completed in full in order to be considered. Please use the checklist below to ensure that you have met all the conditions of this application.

GENERAL ITEMS

HAVE I

Completed Sections A, B & C?	Y	N
Read Sections D & E?	Y	N
Completed a separate application for each project / request?	Y	N
Completed the Sponsorship Agreement Declaration?	Y	N

APPLICATION REQUIREMENTS

IS MY ORGANISATION

Actively operating and meeting on a regular basis?	Y	N
Actively seeking assistance from other funding bodies?	Y	N
Will your organisation be prepared to make a short presentation at a community sponsorship function?	Y	N
Aware that they must attend a community event to receive their Community Sponsorship?	Y	N

HAVE I

Clearly identified the groups who will benefit from this sponsorship?	Y	N
Provided a current Profit and Loss Statement?	Y	N
Provided minutes referring to this application or a letter of authority?	Y	N
Submitted all the supporting documentation required?	Y	N
Met the application deadline?	Y	N
Clearly stated the reason for funding and the amount required?	Y	N
Made plans and project details available to the Board if requested?	Y	N

If you don't bank with us don't panic

- Tick this box and we can arrange for our manager to meet with your group and review your banking needs and see what solutions we can offer to benefit your group.

- Tick this box to opt out of receiving marketing material.

COMMUNITY SPONSORSHIP AGREEMENT DECLARATION

If the Community Sponsorship is provided, the organisation agrees to the following conditions:

1. The Community Sponsorship will be used for the purpose for which it was given and will be expended in accordance with the Sponsorship Approval Schedule, unless otherwise agreed in writing by the board of Plantagenet Community Financial Services Ltd.
2. If the organisation winds up, or if the assets purchased are no longer required for the purpose sponsored, the assets will be transferred to an organisation of a similar nature approved by the Board.
3. If the sponsorship or pledge is conditional, the funds will be used within the defined timeframe, i.e. Sponsorships not accessed within twelve (12) months from the nominated start date will be written off.
4. If there is to be any delay in the expenditure of the sponsorship, a written request is to be made seeking approval for an extension of time.
5. The publicity requirement of the bank will be met and the sponsorship will be acknowledged specifically in the Annual report.
6. Any special conditions that are attached to the sponsorship will be met.

MUST BE SIGNED BY TWO (2) OFFICE BEARERS

DECLARATION:

We hereby certify that we have been authorised by _____
(name of your organisation)

To submit this application and that the information contained herein and attached is to the best of our knowledge true and correct.

We agree to the conditions of Sponsorship Agreement Declaration.

We understand that any decision by the Board will be final and not subject to any appeal process.

Name of Authorising Officer	
Position in Organisation <u>must be Chair or President</u>	Chairperson / President
Signature	
Date	

Name of Authorising Officer	
Position in Organisation	
Signature	
Date	

Plantagenet Community Financial Services Limited ABN 89 096 387 816 who own and operate Mount Barker (WA) Community Bank branch will collect, hold and use your personal information to assess your application and respond to your request. Your information may be shared with Bendigo Bank and organisations that carry out functions on behalf of Bendigo Bank. For information on how we handle your personal information or how you can access it please read our Privacy Policy www.bendigobank.com.au. Bendigo and Adelaide Bank Limited, ABN 11 068 049 178 AFSL / Australian Credit Licence 237879.