



Sarina **Community Bank**[®]
Branch



Community Engagement Program **2019-2020**

Community Engagement Program 2019 - 2020

Community Engagement Program	Page 1
Sponsorship	Page 3
Marquee Program	Page 9
Scholarship Program	Page 10
Community Grants	Page 11
Donations	Page 13

The Community Engagement Program

Sarina Community Bank[®] Branch is operated by Sarina and District Community Financial Services Limited (SDCFSL), a locally owned company with local shareholders, under a franchise agreement with banking partner Bendigo and Adelaide Bank. The Branch opened in 2005 and since then over \$2.2 million has been invested directly into community initiatives and projects through the Community Engagement Program.

This only is possible thanks to the customers of Sarina **Community Bank**[®] Branch. Growing the customer base allows this unique banking model to thrive and prosper thereby allowing us to continue to invest profits into the local community and leave a legacy for future generations.

Thanks to our customers!

Objectives

The objectives of the Community Engagement Program are to

- Enhance visibility of the benefits of Sarina's own **Community Bank**[®] branch
- Develop an ongoing mutually beneficial relationship between community and Sarina **Community Bank**[®] Branch
- Build community capacity and enhance our community as a great place to live.

A successful banking business that is commercially viable, yet community spirited, underpins this community investment.

Sponsorship

Sponsorship is a business relationship whereby the parties receive a mutual benefit. When Sarina **Community Bank**[®] Branch provides sponsorship investment to an organisation these activities provide a benefit to the community. **This should provide exposure and opportunities for Sarina Community Bank[®] Branch to expand its customer base, which underpins our sustainability and allows us to continue to invest a percentage of profits back into the community. This is how we are different from other banks.**

Objectives

The objectives of the Sponsorship Program are to

- Provide a highly visible community profile for Sarina **Community Bank**[®] Branch
- Activate strong support from Committee, membership and associates for Sarina **Community Bank**[®] Branch
- Develop and maintain relationships with the community
- Provide a return on investment to the Sarina **Community Bank**[®] Branch by increasing the customer base
- Underpin the sustainability of Sarina **Community Bank**[®] Branch

When Sarina **Community Bank**[®] Branch invests through a sponsorship; it is about creating mutual value. There are a number of minimum obligations and opportunities for the bank's community partners. Organisations that are successful will be required to enter a Sponsorship Relationship Agreement that establishes this formal relationship. Brand exposure (logo use) is considered a bonus but is not the primary goal of sponsorship.

The focus is about how we can work together to generate value for your organisation and achieve your aims, as well as advocate for your local Sarina **Community Bank**[®] Branch and encourage others to support the local Branch that supports you and assist with expanding our customer base.

We do require exclusivity as the only bank, credit union or financial services institution as your sponsor.

Sponsorship Categories

These are the broad sponsorship categories.

Partnering

- Continuing Relationship - specified period
- High visibility
- Strong Value Proposition
- Exclusivity

Major

- Major sponsor - Organisation/Event/Program
- Naming Rights
- Exclusivity
- High Visibility in Community & Organisation

Associate

- Smaller Event / Program
- Category Sponsor / Exclusivity
- High Visibility within Organisation

Supporter

- Prizes & Awards
- High Visibility within the Organisation

**All sponsorship is about generating mutual value
for our organisations.**

Guide to the sponsorship relationship

The sponsorship relationship requirements for your organisation based on investment levels are set out below. These requirements will be included as part of the Sponsorship Relationship Agreement tailored as appropriate to your specific organisation.

Sponsorship Requirements for all levels of investment	
<ul style="list-style-type: none"> • Open and maintain an active banking relationship for all your organisation’s banking needs with Sarina Community Bank[®] Branch • Acknowledgment of the Sarina Community Bank[®] Branch sponsorship in all marketing collateral (approval required) • Promotion – logo, web links and sponsorship attribution to be included on your website, print and e-newsletters, posters, flyers, banners and relevant signage • Facebook posts at regular intervals acknowledging the sponsorship of Sarina Community Bank[®] Branch; like and share Sarina Community Bank[®] Branch posts • Membership/Colleagues/Networks – actively promote the Sarina Community Bank[®] Branch as a banking option with your members and your members’ extended networks; this may include forwarding various banking information and offers to your members from Sarina Community Bank[®] Branch • Host a Branch representative at your member meetings; if the sponsorship is for an event, allocate a speaking opportunity for a Branch Representative at the event. • Media opportunities: inclusion in any external media opportunities acknowledging the Sarina Community Bank[®] Branch sponsorship • Access (pending availability) of the Wireless Community EFTPOS terminal • Signage (permanent) acknowledging the sponsorship to be visually prominent at your venue (Sarina Community Bank[®] Branch will assist with this) • Attend the formal Community Engagement presentation hosted by Sarina Community Bank[®] Branch 	
Referrals from your organisation based on level of sponsorship investment	
Up to \$1000	Typically includes one (1) referral for a home or business loan within a 12 month period to the Sarina Community Bank [®] Branch
\$1001 - \$3000	Typically includes two (2) referrals for a home or business loan within a 12 month period to the Sarina Community Bank [®] Branch.
\$3001 - \$5000	Typically includes three (3) referrals for a home or business loan within a 12 month period to the Sarina Community Bank [®] Branch
\$5001 - \$10000	Typically includes four (4) - six (6) referrals for a home or business loan within a 12 month period to Sarina Community Bank [®] Branch
Any use of the Sarina Community Bank[®] Branch Logo must be approved by us.	

Please liaise with the Executive Assistant with regard to the Sponsorship requirements.

Reporting and Acquittal

To assist with our audit requirements, organisations are required to provide evidence of how the sponsorship investment has been expended and how other aspects of the Relationship Agreement have been met. By providing this information your organisation will ensure that it remains eligible to apply for future community engagement opportunities. A number of progress check-in points are identified to update on the sponsorship relationship.

We will provide you with an Acquittal document tailored as appropriate to your Sponsorship Relationship Agreement.

Sponsorship Applications

Sponsorship applications must be submitted via the electronic form. The Executive Assistant (contact details on last page) will provide the link to the form at each round opening. Ensure your organisation's contact details are up to date. Please ensure you submit a comprehensive and complete application and provide all required information in support of your proposal.

Applications will be considered on the following basis

- Must be a properly constituted not-for-profit organisation or auspiced by an incorporated organisation
- Hold a current public liability certificate
- Organisation has an existing relationship with Sarina **Community Bank**[®] Branch; payments will be made to your Sarina **Community Bank**[®] Branch account.
- Acquitted satisfactorily any previous Sarina **Community Bank**[®] Branch sponsorship.
- Provided complete information about your proposed activity and demonstrate how it provides community benefit. **TELL YOUR STORY.**
- Clearly demonstrated how such a sponsorship investment can be mutually beneficial and generate value for both parties.
- Provided most current financial statements of your organisation (preferably audited statements)
- Provided a detailed budget including formal quotes from legitimate enterprises
 - 1 quote for items up to \$1000 (a quote for each component part)
 - 2 quotes for items over \$1000 (a quote for each component part)
- Budget shows Income and Expenses for your project; and the amount requested for sponsorship must be clearly identified in the Income, along with income from any other sources. (For example, if you are seeking sponsorship for an event and there are fees to attend, you must estimate entry fees/registration fees as Income. If you intend making a profit then please show that.) If you have applied for other grants, please show those in your budget.
- Your budget must balance.
- Demonstrated that local suppliers have been considered in the first instance (and then the broader Mackay Region) for the purchase of items or engagement of services

Sponsorship Timeline

Sponsorship applications are accepted by the Sarina **Community Bank**[®] Branch based on the timeline set out in the Appendix. Please note the closing date.

You need to plan well ahead (min 6 months). In particular where you are looking for sponsorship of an event that is to be held January to June, then you need to apply in the Sponsorship Round that opens in August the year prior.

Additional Information

- Sponsorship is available to organisations not individuals.
- All applicant organisations must be an appropriately incorporated body or auspiced by an incorporated body.
- All incorporated bodies must hold an ABN and be able to forward a tax invoice in order to receive the sponsorship investment.

What is not eligible for sponsorship?

Proposals that fall under the following categories will not be considered in accordance with Bendigo and Adelaide Bank Sponsorship guidelines based on brand vision and values.

- Support political or religious organisations
- Denigrate, exclude or offend minority groups
- Encourage violence
- Create environmental hazards
- Present a danger to public health or safety
- Take place outside of Australia

Note: The following are not considered sponsorship

- Charitable donations (refer Donations)
- Direct advertising

Marquee Sponsorship Program

This is a dedicated sponsorship initiative of Sarina **Community Bank**[®] Branch to support organisations in their activities by investing in

- a marquee (3m x 3m) with the respective logos

This sponsorship suite also includes

- 2 x feather banners or a single pull up banner; and
- a logo printed tablecloth.

Applications for a marquee must be submitted via an electronic form (separate to the sponsorship application). Organisations may apply for a marquee as well as a Sponsorship.

The Executive Assistant (contact details on last page) will provide the link at the opening of each round. Ensure your organisation's contact details are up to date.

We appreciate the importance of being Sun Smart so that we can enjoy the great outdoors and this will enable organisations to have a highly visible presence at events and afford some protection.

Awards and Prizes

We are pleased to support organisations with their activities and events. If you are seeking a prize or award for your event, then please ensure you request this at **least 60 days in advance of the event (and preferably 120 days or longer)**.

This will ensure time for us to talk with you about your requirements and determine a suitable investment.

These requests must be in writing on your letterhead and forwarded to the Executive Assistant (contact details are provided later in this document.)

Scholarships

Sarina Community Bank[®] Branch CQUniversity Higher Education Scholarship

This Scholarship aims to encourage the local community to study, live and work locally, by providing financial support and encouragement to attend the local Mackay campus of CQUniversity. This Scholarship supports students within the Sarina/Mackay district studying business and business related programs. The student should be enrolled in a Degree Program (or double Degree) under the School of Business and Law. Students of the Bachelor of Professional Communication, Bachelor of Digital Media or Bachelor of Information Technology also are eligible to apply.

The total **Scholarship Value** is **\$6000** paid over three years. Applications usually open in November and close 31 March the following year.

Sarina Community Bank[®] Branch CQUniversity Apprentice Scholarship

The Scholarship aims to encourage the local community to study, live and work locally, by providing financial support and encouragement to take up a vocation and attend the local Mackay campus of CQUniversity. A Scholarship to support students within the Sarina / Mackay district undertaking Apprenticeship training through CQUniversity. The student should be taking up an Apprenticeship (first year) and be enrolled/or intending to enrol in either Electrical, Mechanical, Building, Automotive Engineering and Technology, Manufacturing Engineering and Technology or Hairdressing

The total **scholarship value** is **\$4000** paid over four years. Applications usually open in December and close on 31 January the following year.

Sarina Community Bank[®] Branch Scholarship

Senior Schooling Community Citizenship – Sarina State High School

This Scholarship supports students attending Sarina State High School. The student must be intending to complete Grades 11 and 12 (consecutively) at Sarina State High School and aims to encourage students in the Sarina community to pursue higher studies and understand the importance of community citizenship.

The total **Scholarship Value** is **\$2000** paid over two years. Applications usually will open in September each year. The Scholarship will be announced prior to the close of the school year.

Sarina Community Bank[®] Branch Student Ambassador Program

The Student Ambassador Program supports

- Higher Education Students studying at CQUniversity Mackay and the value is \$1500 each student for three years.
- Senior students (Grade 11 and 12) of Sarina State High and the value is \$500 each student for two years.

Applications are called at the same time as the respective Scholarship Programs.

Community Grants

A community grant is about building capacity that addresses local needs and makes a positive contribution to the Sarina and district community.

When Sarina **Community Bank**[®] Branch provides a community grant investment to an organisation, the focus is on the positive benefit to the broader community. Community grant applications are encouraged that develop the capacity of the organisation to meet the needs of local residents, or to develop innovative programs that address local issues.

Applications also are encouraged that assist with building, grounds or asset development of facilities used by the community. This also includes for the purchase of capital items deemed necessary for the development, support or administration of your organisation. (Community Grants are not available for recurring or operational expenses.)

Applications for staging community events also will be considered where such events assist in building community capacity and promote community participation. Applicants seeking funding for annual events need to consider the ongoing viability of the event. Event sustainability must be considered.

Applications are encouraged that demonstrate partnering with other organisations to deliver the program/project/event.

The Community Enterprise Foundation administers funds allocated by Sarina **Community Bank**[®] Branch for the Community Grants Program of our Community Engagement Program.

All applications must be submitted online to the Community Enterprise Foundation www.bendigobank.com.au/foundation. You need a user log on and password. If your organisation has applied for a community grant previously whether successful or not, you need to use the same log on details.

Please ensure you read and follow the instructions for completion of the electronic form. Information to assist is provided in your Resource Pack. Please ensure you access the online form via a compatible Internet browser; Google Chrome recommended, otherwise the online application will not function correctly.

Community Grants Timeline

Community Grant applications are accepted by the Sarina **Community Bank**[®] Branch based on the timeline set out in the Appendix. These are managed through the Community Enterprise Foundation. Please note the closing date.

You can be gathering your information before the applications open. Information such as your ABN, Insurance Certificate and similar are required for all applications so keep these in a safe and readily accessible location.

Assessment Criteria

The Community Enterprise Foundation is responsible for making sure the application meets the eligibility criteria for a community grant. Once deemed eligible, applications are forwarded to the Sarina **Community Bank**[®] Branch for consideration by the Board and its Advisory Panel based on local eligibility and selection criteria. The Advisory Panel assesses each community grant application and provides a recommendation to the local Board of Sarina and District Community Financial Services Limited, which then determines the level of investment.

Once applications are deemed eligible, they will be assessed according to **local eligibility criteria**.

- Organisation has an existing relationship with Sarina **Community Bank**[®] Branch
- Must be a properly constituted not-for-profit organisation or be sponsored by an incorporated organisation.
- Hold a current public liability certificate
- Have acquitted satisfactorily any previous Sarina **Community Bank**[®] Branch Grant
- Submitted most current financial statements of your organisation
- Submitted a detailed budget for the program/project/event including quotes from legitimate enterprises
 - 1 quote for items up to \$1000 (a quote for each component part)
 - 2 quotes for items over \$1000 (a quote for each component part)
- Demonstrated that local suppliers have been considered in the first instance (and then the broader Mackay Region) for the purchase of items or engagement of services
- Provide complete information about your proposed activity; consider if your project could be undertaken in stages.
- Submitted professionally drafted plans if your application is for a building or construction project and have obtained any necessary approvals.
- Sustainability of your project/event – ongoing maintenance/operational issues or viability of an event should be considered.
- Program/project/event outcomes will deliver maximum benefit to the Sarina and District community
- Significant membership resident in the Sarina and District community

The following will **NOT** be considered:

- Ongoing salaries/wages for staff
- Operational costs / recurrent costs of an organisation
- Retrospective funding (funding for projects that already have commenced or completed)
- Items or programs that are core business of Government departments (local, state and federal)

Selection Criteria

Ensure you have addressed the Selection Criteria in your application.

Incomplete applications will not be considered and you will have to apply in a future round.

Once local eligibility is established, each application is assessed for funding against the following

- Project provides a direct or indirect benefit including social and economic for residents of the Sarina and District Community; evidence should be provided (e.g. letters of support)
- Application provides required and substantial information on project aims, description, budget, quotes timeframes
- **Demonstrated evidence of financial commitment by applicant organisation—minimum cash and / or in kind = 20% (If it's important to your organisation there has to be some commitment from your organisation.)**
- Provides evidence of financial commitment from other sources (e.g. local businesses, local/state/federal funding programs; other funding programs)
- Demonstrates enduring benefit for the community and/or stimulates further development opportunities
- Demonstrates that local suppliers have been considered in the first instance (and then the broader Mackay Region) for the purchase of items or engagement of services

Successful Community Grant recipients will be required to:

- Acknowledge the financial contribution of Sarina **Community Bank**[®] Branch in any publication or publicity material /events associated with the funded activities.
- Work with the Sarina **Community Bank**[®] Branch to identify any media opportunities that promote your program/project/event and invite a Sarina **Community Bank**[®] Branch representative to participate.
- Attend the Sarina **Community Bank**[®] Branch formal presentation of the grant.
- Actively promote the Community Grants program in the community and the benefits of banking with your Sarina **Community Bank**[®] Branch including on social media such as Facebook. (Tell our stories)
- Note: Sarina **Community Bank**[®] Branch reserves the right to erect signage to acknowledge the provision of the Community Grant. This signage remains the property of Sarina **Community Bank**[®] Branch and cannot be removed or altered without the permission of the Board.

Please ensure that all the required documentation is submitted with your application. Note the format requirements for any attachments.

Donations

Donations are distinct from Sponsorship and Community Grants. A donation is focussed on charitable purposes and only made to organisations that hold the status of Deduction Gift Recipient (DGR) approved by the Australian Taxation Office.

Requests for donations are not confined to the timelines, however any organisation should make their request in a timely manner and allow 60 days for consideration.

APPENDIX

We encourage a diverse range of organisations to apply to the Community Engagement Program. Please ensure you following the guidelines in relation to the respective application.

Community Engagement Program Timeline

This timeline applies to **Grants and Sponsorships** and all applications should be submitted by the closing date to be considered.

Note: For Sponsorship applications, you should apply now for any requirements up until 30 June 2020. Applications in relation to events or activities to December 2020 will be considered as part of our 2019-2020 Round 2.

2019-2020 Financial Year

ROUND 1

Applications open 2 September 2019

Applications close 20 September 2019

Formal presentation 29 October 2019

ROUND 2

Applications open 2 March 2020

Applications close 27 March 2020

Formal presentation 21 May 2020

INFORMATION

For further information or assistance regarding any component of the Community Engagement Program, please contact:

Patrice Willoughby

Executive Assistant to the Board

Sarina and District Community Financial Services Limited

Mobile: 0435 537 012

Email: executive@sarinacommunity.com.au

Important Requirements for GST:

Please ensure you are aware of your organisation's GST status and clearly indicate this in your application whether it is for Sponsorship or a Community Grant.

The Australian Taxation Office advises that if your not-for-profit organisation is registered for GST, you must include 10% GST on most, or all, of its sales.

For sponsorship applications, this is directly relevant to the preparation of your tax invoice that you need to submit to Sarina **Community Bank**[®] Branch for payment.

Application Checklist for Community Grant or Sponsorship

- All relevant sections of the application form have been completed.
- Letters of support – essential to demonstrate community support/benefit
- Current contact details of your representatives
- Recommended: use an organisation email (ie. club@gmail.com.au)**
- Detailed project description including any plans and agency approvals
- Detailed project budget including quotes – note quote requirements for components of the project as well as the overall project;
- Photos (and any other supporting documentation) to highlight your project
- Latest financial statements of the applicant organisation (preferably audited)
- Copy of current Public Liability Insurance Certificate
- Copy of current Incorporation Certificate
- Authorised office bearers have approved the application