

# MERBEIN DISTRICT FINANCIAL SERVICES LTD



## Sponsorship Application Guidelines

Merbein District Community Financial Services Limited is dedicated to providing quality banking and financial services in our region. Community Bank Merbein & District is a locally owned and operated franchise of Bendigo Bank. We are one of two Community Bank companies in our region. We are run by a board of volunteer directors who give up their time to ensure the company is run in a professional, efficient and fair manner.

### **Where does the sponsorship money come from**

Sponsorship money is held in our Marketing and Development Fund.

By banking with Community Bank Merbein & District, you are increasing our ability to re-invest in and support our local community through our Marketing and Development Fund.

We distribute these funds to address local issues, effect positive change in the community and help make our community a thriving place to live, work and visit. And you don't need to live in our community to bank with us. Once you have your personal or business accounts, loans, or insurance with us, you can do your day-to-day banking at any of the 500 Bendigo Bank or Community Bank branches around Australia, or via the internet, banking app or telephone banking.

Since start-up in 2004, through the support of our customers, the Community Bank Merbein & District has provided in excess of \$700,000 in sponsorships to local organisations. This is because we operate under the community bank model. Find out more here –

[Community Banks  
Be the Change](#)

 **Bendigo Bank**

**Community Bank  
Merbein & District**

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## Purpose

### To Build a Better Community

Our Community Sponsorship Program is an annual funding process for local, not-for-profit, organisations or community groups that provide services to the local community. The Community Grants and Sponsorship Program supports a broad range of initiatives.

### Principles Supporting our Community Sponsorship Program

Merbein District Community Financial Services Limited was founded on a belief that communities that come together for a common purpose can really make a difference. Opportunities to strengthen and improve participation for enduring and longer-term outcomes are essential for community health and well-being. Our company values collaboration, team work and communication and strives to work with an ethical framework and social responsibilities, and responsibility to our shareholders.

## Definitions

Sponsorship is the purchase of tangible potential rights and benefits associated with an event, entrant, or organisation, which results in increasing brand awareness, communication of key messages and increased customer base for the sponsoring organisation.

Sponsorship is not advertising, hospitality or return of favour and does not include the following:

- Donations (free money given with no benefits).
- Grants (a sum of money provided or received by an organisation for a specific purpose).

Sponsorships are granted to increase awareness of the Bendigo Bank brand and/or products and provide a financial return on investment to the Community Bank branch by increasing the customer/business base.

Sponsorship is used to enhance our key message as a community-based organisation to strengthen recognition of the brand to the broader community and to maintain or develop further relationships with communities and groups.

## Sponsorship Application Information

Applications will be considered by a board committee who will make a recommendation to the full board.

## Timeline

**The Community Sponsorship Program is a process which invites applications for sponsorship once a year. Applications open on 1 September 2024 with a deadline of 5.00pm on 30th September, 2024. Out of fairness to those that apply, no applications will be accepted after the deadline has passed.**

Applicants must submit an application form and be available for interview, if required.

1. Community groups and organisations must be incorporated under the Associations Incorporation Act or auspice by an Incorporated Association and deemed to be non-profit.

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## Timeline continued

2. The application form must be completed in full and include as much relevant information as possible, including (but not limited to):
  - time, location and audience of event
  - total funding required
  - copies of quotes
  - itemised costings
  - details of how the funds will be spent
  - details of other sponsors and monies raised
  - community and stakeholder benefits
3. All successful recipients will be required to complete and submit an acquittal form. If this is not done recipients will be ineligible for future funding.
4. Applications for sponsorships will be assessed by the Marketing and Development Board Committee of Merbein District Community Financial Services Limited. Members of this committee may request further information.

A Community Company Board or staff member that has a conflict of interest in an application must declare their interest and they will not be involved in decisions about the application.
5. Recommendations for funding will be forwarded to a full board meeting.
6. Applicants will be notified in writing of the outcome of their application within 6 weeks from the closing date.
7. Merbein District Community Financial Services Limited may choose to provide only part of funding requested in an application. A break up of the funding allocation would assist in determining the value allocated.
8. Successful applicants will be required to attend a special presentation function.
9. All applicants will be expected to provide marketing and promotional opportunities for Community Bank Merbein & District.

## Conditions of funding

1. We do not support projects that rely solely on recurrent or ongoing grant funding.
2. We only support projects that can demonstrate community support and benefit.
3. The applicant must have an established and maintained account specifically with Community Bank Merbein & District. In return for sponsorship, we seek a mutually beneficial relationship with the sponsored organisation. As well as expecting the organisation to bank with us, we expect to be promoted to its members and to encourage its members to bank with us. In this way we can continue support the community in the future.
4. An applicant organisation must have a minimum of three members/associates that bank with Community Bank Merbein & District.

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## Conditions of funding continued

Successful applicants must:

5. Provide mutually agreed opportunities to promote the Community Bank Merbein & District to stakeholders through speaking opportunities
6. Include the Community Bank Merbein & District logo in promotional material, newsletters, website and Facebook with links (if applicable)
7. Not have funding from any other financial institution
8. Identify a clear and well-planned use for the funds and demonstrate that the funding will provide broad community benefit and involvement
9. Be able to demonstrate that they are viable and have a sound committee structure
10. Operate in the Mildura Rural City Council local government area
11. Spend the funds within 12 months of receipt and only use the funds as outlined in the relevant application form
12. Provide our acquittal form detailing the use of the funds within 12 months of receipt of funds.

If your application is successful you may need to sign a contract.

## Managing Expectations

- We sponsor organisations rather than individuals.
- We do not fund ongoing operational costs (e.g., rent, salaries, maintenance and administration).
- We do not fund projects where there is a more appropriate funding source.
- We do not reimburse money already spent.
- Direct advertising is not considered sponsorship.
- Applications are considered on merit each year. If you are successful one year you may be not the next year.
- All decisions are at the discretion of the board.
- Seasonal sporting codes should only apply in the season prior to the funding round.

## To consider when preparing and completing your application

- We love media opportunities that demonstrate how the bank is supporting your organisation.
- We want opportunities to include messages and advertisements in your newsletters and other member correspondence.
- We want opportunities to distribute offers to your members, including an online referral form through your electronic communications.
- We encourage your members who do bank with us to contact the branch and ask our team to hashtag their accounts with the community groups they are involved in. This will allow our Branch Manager to advise the Marketing and Development Committee of your business support for Merbein District Community Financial Services Limited.

To place a hashtag (#) on your accounts please call the branch on (03) 5025 1377.



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## Who and what is not eligible?

- Events, projects 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 other financial sector or banking competitors

Projects that benefit an individual rather than a community

- Projects that support private businesses and commercial activities
- Ongoing operational costs such as insurance, utilities, or rent
- Activities which are religious or political in nature, or support a religious or political cause
- Applicants who have outstanding (have not returned) final acquittal reports for previously funded projects
- Any project retrospectively, including expenses that occur prior to or after the project dates

## Specific Information about funds

Sponsorship funds will be paid by direct credit into the successful applicant's Community Bank Merbein & District account. Successful applicants must provide receipted tax invoices which demonstrate that the sponsorship money has been expended in accordance with their application.

Successful applicants are expected to comply with any relevant legislation, particularly with regard to employment practices and managing risk.

## ABN (Australian Business Number) & GST (Goods and Services Tax)

- Successful organisations who do not supply us with an ABN will have withholding tax of 48.5% deducted from their sponsorship.
- Successful organisations with an ABN and not registered for GST will receive their sponsorship in full.
- Successful organisations with an ABN and registered for GST will need to supply a tax invoice to receive their sponsorship, plus 10% GST.

## Insurance

Groups applying for sponsorship will be required to supply a copy of all relevant insurance documentation, particularly public liability insurance which covers incidents that may occur within a building or during a function or activity conducted by a group.

Please note that Community Bank Merbein & District can assist with any insurance needs. Contact our team on (03) 5025 1377. This includes:

- Public Liability
- Events
- Committees
- Volunteers

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## Acquittal Form

All groups that receive sponsorship funding are required to complete a sponsorship acquittal form at the completion of the sponsorship. Once an Applicant's funding is received, they will be sent an acquittal form which is to be completed and returned as soon as the funds have been expended. This is used to assist in measuring the success of the sponsorship. A sponsorship acquittal form must be completed if the organisation wishes to be considered for future sponsorship funding.

## How to apply

1. Complete the application form and ensure you include all information requested.
2. Applications should be typed or clearly handwritten. If you need to attach additional information, use A4 paper, number the pages and submit it with the application form.
3. Applications for sponsorship must be submitted by the closing date.

## Download forms

Hardcopies of the Application Forms are available from the Community Bank Merbein & District. You can also request a copy via email at [sponsorship@merbeincb.com.au](mailto:sponsorship@merbeincb.com.au) or alternatively you can print one out from our Community Bank Merbein & District website: [bendigobank.com.au/merbein](http://bendigobank.com.au/merbein)

## Submission

Applications can be submitted the following ways:

- Emailed to [sponsorship@merbeincb.com.au](mailto:sponsorship@merbeincb.com.au) (preferred method)
- In person at the Community Bank Merbein & District

66 Commercial Street, Merbein

9.30am - 5.00pm Monday to Friday

- Posted to Sponsorship Applications

Merbein District Community Financial Services Limited  
PO Box 890  
Merbein VIC 3505

Submit one copy of the application form and retain one for your organisation's records. We will acknowledge receipt of your application.

Privacy: Merbein District Community Financial Services Limited ABN 68 108 297 945 who own and operate Community Bank Merbein & District 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](http://www.bendigobank.com.au). Bendigo and Adelaide Bank Limited. ABN 11 068 049 178 AFSL 237879. (1389140- 1389138)



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