



Newcastle Permanent Community Sponsorship Guidelines

May 2018

Our brand values

Newcastle Permanent is committed to supporting the local communities we serve through community sponsorships.

Our brand tagline, **Here for good** encapsulates the attributes and values of mutuality that Newcastle Permanent represents: member focus and meaningful support for the communities we serve, with integrity, honesty and fairness.

Any event, initiative or cause we support must reinforce these brand values.

Sponsorship criteria

Newcastle Permanent will generally only sponsor community events, activities or programs that:

- support and strengthen the communities we are part of through:
 - junior sport;
 - children's education; and
 - major community events which have broad appeal to the local community, particularly families;
- are based in the geographic areas we operate in:
 - Hunter (including Newcastle, Lake Macquarie, Port Stephens, Maitland and the Upper Hunter);
 - Central Coast (from Woy Woy to Wyoming);
 - Mid North Coast (Taree, Forster, Port Macquarie and Coffs Harbour);
 - New England (Armidale and Tamworth);
 - Northern Rivers (Grafton, Lismore and Ballina); and
 - Central West (Bathurst, Dubbo, Mudgee and Orange).
- have the ability to be implemented across multiple locations within Newcastle Permanent's operating footprint;
- provide financial services category exclusivity (i.e. there are no banks, credit unions or other building societies involved);
- provide prominent brand exposure in media advertising and promotional collateral and/or broad community visibility through the target audience;
- provide strong and broad-based community benefits for a reasonable investment; and
- provide a minimum of three months lead time to allow for evaluation and preparation.

Additional considerations

Further consideration will also be provided to sponsorship proposals that:

- offer unique or exclusive experiences for our members and staff;
- have significant and/or multiple media partners; and
- conduct audience research during and/or after the event, including sponsor related questions.

Criteria which may result in exclusion

Newcastle Permanent generally will not support projects, initiatives, organisations or events that:

- seek to raise funds for individuals;
- are associated with dangerous, contentious, divisive or anti-social activities including (but not limited to) gambling, alcohol, drugs, firearms, beauty pageants, motor racing and boxing;
- have any political or religious agenda or associations;
- do not offer any significant local community benefits, such as events held overseas or events that attract large numbers of visitors from outside Newcastle Permanent's operating footprint;
- only benefit Newcastle Permanent staff or relatives/friends, as individuals or teams; or
- only benefit professional sporting teams or individuals.

Not-for-Profit organisations

Not-For-Profit organisations with Deductible Gift Recipient status seeking funding for local community projects are encouraged to visit the Newcastle Permanent Charitable Foundation website: newcastlepermanent.com.au/foundation

Requirements for sponsorship proposals

All submissions for sponsorship should be made in writing and include:

- key details of the event, program, project or opportunity (such as venue, dates, whether it is a one-off or annual event or initiative, contact name, email and mailing address of the key contact);
- anticipated number of attendees/participants and demographics of attendees/participants (such as age, place of residence);
- marketing plan overview, including planned and confirmed marketing activities, advertising schedules and proposed budget for advertising;
- information on other sponsors that have committed to the event or project;
- a comprehensive list of sponsorship benefits, including how they relate to Newcastle Permanent and its products and services;
- a timeline of the event preparation and execution, including important deadlines;
- credentials of the company or organisation including background on key individuals involved in the event or project;
- a statement of whether the organisation has an existing relationship with Newcastle Permanent or if there is an opportunity for Newcastle Permanent to assist the organisation with its financial needs;
- hospitality, entertainment or other relevant activities that Newcastle Permanent members and staff can become involved in;
- an indication of the amount of funding the organisation is seeking from Newcastle Permanent; and
- details of any appropriate insurances and permits.

Please note: All sponsorship partners must hold and maintain both Workers Compensation insurance and public and products liability for a minimum amount of \$20 million in respect to any single claim with Newcastle Permanent Building Society Limited noted as an interested party.

Evaluation process

- All sponsorship requests will initially be assessed against the criteria set out in these guidelines.
- If the proposal does not meet our criteria then a letter of decline will be issued via email or post.
- If the proposal meets our criteria, a Formal Evaluation will be conducted to fully assess the proposed opportunity. Appropriate approvals will then be sought based on the Formal Evaluation and the current Sponsorship Strategy.
- If the proposal is approved, the applicant/s will be notified of the decision and if necessary, a Sponsorship Agreement will be prepared.
- While we review each request individually on its merits, given the large volume of proposals we receive, we are unable to support every sponsorship request.
- We endeavour to respond to each request within four weeks of receipt. Once this decision is made, no further correspondence will be entered into.
- Proposals may be submitted to sponsorship@newcastlepermanent.com.au or mailed to:

Sponsorship Manager
Newcastle Permanent Building Society
PO Box 5001
Hunter Region Mail Centre NSW 2310

**For further information about our
community sponsorship, please
contact the Sponsorship Manager**

Email: sponsorship@newcastlepermanent.com.au

Mail: PO Box 5001, HMRC NSW 2310