



# 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](http://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](mailto: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](mailto:sponsorship@newcastlepermanent.com.au)

**Mail:** PO Box 5001, HMRC NSW 2310