

Sponsorship Policy

Effective Date: 23 May 2023

Review Date: 22 May 2026

1 Purpose

The purpose of this policy is to establish the framework and guidelines to create mutually beneficial partnerships between The Mutual Bank and likeminded community-based organisations in the areas in which we operate.

2 Policy Statement

The Mutual Bank is committed to supporting our Members and communities by sponsoring suitable opportunities that are aligned to our Vision, Purpose and Values.

The objectives of this Policy and associated processes are to:

- Establish a consistent evaluation process to ensure Sponsorships are aligned with our purpose and business objectives, and support the bank's values;
- Promote our brand in a strong, positive and sustainable way;
- Maximise the use and activation of negotiated entitlements to fulfill the bank's brand and commercial objectives; and
- Leverage Sponsorships to demonstrate good corporate citizenship.

3 Scope

This Policy applies to all Team Members and all applications for sponsorship.

4 Definitions

For the purposes of this Policy:

Activation refers to the additional investment above the cost of the actual sponsorship to ensure maximum value from the sponsorship. This may include Team Member time, merchandise, signage etc.

Category Exclusivity refers to the bank's right as a sponsor to be the only company within the financial services industry to be associated with the sponsored initiative, property or asset.

Sponsorship is the purchase of tangible potential rights and benefits associated with an organisation and/or event with the intention to increase brand awareness, communicate key brand messages and increase Member acquisition opportunities.

Team Member refers to any employee of The Mutual Bank.

5 Roles and Responsibilities

Role	Responsibilities
Branch Supervisor	Approve applications for and coordinate Small Sponsorships
Chief Executive Officer	Approve applications for Marquee Sponsorships
Chief Member Officer	Approve applications for Large Sponsorships
Marketing and Communications Manager	Approve applications for Medium Sponsorships
Marketing Team	Maintain this Policy and associated processes Ensure all sponsorship requests comply with this Policy Coordinate Medium, Large and Marquee Sponsorships
Team Members	Comply with this policy

6 Policy

6.1 Applying for Sponsorship

All enquiries for Sponsorships should be directed to The Mutual Bank's sponsorships web page located at <https://www.themutual.com.au/about-us/our-story/sponsorship/>, which includes a guide for submitting an application.

All applications must be submitted in writing.

6.2 Eligibility criteria

The Mutual Bank will consider applications for Sponsorship that:

- Provide long-term opportunities to partner with organisations that make a meaningful impact in the communities in which we operate.
- Are aligned with our Values of Integrity, Respect and Care.
- Are aligned with our Vision to be the bank of choice in the Hunter.
- Are aligned with our Purpose of helping people thrive.
- Provide mutually beneficial outcomes for both The Mutual Bank and the recipient.
- Promote The Mutual Bank brand in a positive way.
- Help us achieve our strategic Member and growth goals.

Preference for Sponsorships will be given to organisations that bank with The Mutual Bank.

The Mutual Bank will only approve Medium and Large Sponsorships where **Category Exclusivity** for the financial services industry is assured.

6.3 Sponsorship Levels

The Mutual Bank offers four levels of Sponsorship.

6.3.1 Small Sponsorships

This category is aimed at building links between branches and their local communities.

Applications for support up to \$500 will be assessed and approved by the relevant Branch Supervisor, in consultation with relevant team members.

Each branch has an allocated total annual budget for Small Sponsorships linked to the number of active Members held by each branch.

Branch teams will be responsible for the **activation** and ongoing relationship of these sponsorships.

6.3.2 Medium Sponsorships

Applications for support between \$501 and \$5,000, and within budget, will be assessed and approved by the Marketing and Communications Manager. These sponsorships will be coordinated by the Marketing Team.

Activation will be supported by the branch network and other Team Members as required.

6.3.3 Large Sponsorships

Applications for support between \$5,001 and \$20,000, and within budget, will be assessed and approved by the Chief Member Officer. These sponsorships will be coordinated by the Marketing Team.

Activation will be supported by the branch network and other Team Members as required.

6.3.4 Marquee Sponsorships

Applications for support greater than \$20,001, or outside of budget, will be assessed and approved by the Chief Executive Officer. These sponsorships will be coordinated by the Marketing Team.

Activation will be supported by the branch network and other Team Members as required.

6.4 Sponsorship Agreement and Evaluation Report

Recipients of Medium, Large and Marquee Sponsorships will be required to enter into a written Sponsorship Agreement with The Mutual Bank clearly outlining the obligations of both parties, prior to proceeding with any Sponsorship activity.

An evaluation report must be submitted to The Mutual Bank within 30 days of completion of the sponsorship, or annually if the term is for more than 12 months.

These requirements may be waived for Medium or Large Sponsorships at the CEO's discretion.

6.5 Exclusions

The Mutual Bank will not provide Sponsorship for the following purposes:

- Political parties or politically driven initiatives;
- Programs detrimental to public health or safety;
- Any alignment to abuse of alcohol or substance abuse, smoking, gambling or activities that involve sexually explicit content;
- Unregistered entities or organisations;
- Sponsorships pertaining to individuals or for individual gain;
- Sponsorships involving the cruelty or mistreatment of humans or animals;
- Organisations driven by particularly divisive social issues; or
- Cash donations.

6.6 Assessing sponsorship applications

Each application will be assessed individually, based on the criteria and guidelines outlined in this Policy. The Mutual Bank requires a minimum of six weeks to assess an application.

All decisions are at the absolute discretion of The Mutual Bank.

6.7 Conflicts of Interest

Team Members must disclose and manage conflicts of interest in accordance with the Conflicts of Interests Policy.

Applicants must disclose any conflicts of interest in their application.

7 Amendments

This policy may be amended at any time by The Mutual Bank.

8 Associated documents

Conflicts of Interest Policy

9 Document Control

Document control information:	
Owner:	Chief Member Officer
Responsible Manager:	Marketing and Communications Manager
Confidentiality:	Public document
Effective:	23 May 2023
Review period:	Three years
Approved by:	Board of Directors
Version number	1

10 Review Table

Date	Detail	Reviewed by
23/5/2023	New Policy	Chief Member Officer