
Sponsorship Guidelines


Heritage Bank has an extensive sponsorship program and supports many diverse areas with primary focus on the arts, refugees, indigenous Australians, women, youth, rural Australia and small business.

We have developed these guidelines to make our requirements clear to potential sponsorship applicants and to encourage the presentation of proposals that meet those requirements. We will not consider any sponsorship opportunities which don't meet these guidelines.



Heritage Bank

People first.

 Talk to us today.

“Helping Hands”

Our sponsorship portfolio is organised under one unifying theme “**Helping Hands**” which embodies the idea of providing a hand-up while helping people help themselves. In doing so, we assist their efforts to grow and prosper.

To that end, we invest only in properties that provide a genuine hand-up to people or organisations. Except in extremely rare cases, all Helping Hands sponsorships are contracted for a maximum period of two years.

Please only provide a proposal which fits this overarching theme.

About Heritage Bank

Below is a short overview to assist you in understanding our brand positioning and target markets.

Brand positioning

Our goal is to partner with rights-holders and properties which have a strong community presence and are a natural match to our brand positioning which is **‘Passionate about helping people’**

- We’ve been rated by our customers as one of the top banks in the country as we strive to be authentic and genuinely helpful.
- We provide individualised attention to our members.
- We’re genuinely committed to our members, community and staff.

Target markets

As a full-service bank, we target a range of potential customers including individuals, SMEs, and enterprise clients.

Our current markets are **all people committed to developing successful financial futures and have an affinity with Heritage Bank’s mutual business model.**

Heritage Bank has branches across Queensland, with concentration in the Darling Downs, Brisbane, Gold Coast, and Sunshine Coast. We also have branches in Western Sydney.

Sponsorship Requirements

Requests of \$5,000 per annum or more must provide Heritage Bank with **at least six (6) of the following requirements.**

Requests seeking less than \$5,000 per annum must provide **at least three (3) of the following requirements.**

All rights-holders must provide **at least two (2) of the items marked ★**

- A natural link with Heritage Bank's brand positioning
- ★ Provision of exclusive and meaningful content for social media and other communications – particularly access to stories we can share, and people we can profile
- ★ License to create exclusive content for social media and other communications
- ★ Opportunities for our staff to become meaningfully involved in the property
- ★ Access to community leaders and/or innovators, particularly for the creation of exclusive content, such as Q&As. Get creative!
- ★ One or more what-money-can't-buy experiences, which will be used to create content
- Direct access to prospective customers
- Distribution to your markets of genuinely helpful content from Heritage Bank – such as Q&As, useful advice, how-to videos, etc. Distribution via EDM, social, or other
- Advertising, advertorial direct linking, or other distribution of Heritage Bank marketing materials to your target markets
- Networking or presentation opportunities for Heritage Bank key staff

- Other property-related benefits that we can pass along to a large proportion of Heritage Bank customers or staff. Use your imagination!

Writing Your Proposal

To be considered, proposals must include:


- ✓ Key details of the opportunity.
- ✓ Outline your target markets and how they align with Heritage Bank's community.
- ✓ Overview of your marketing plan, including what is and is not confirmed.
- ✓ List of sponsors who have committed to date.
- ✓ Comprehensive list of benefits including how they relate to Heritage Bank.
- ✓ A clear outline of the intended sponsorship success measures.
- ✓ Creative ideas as to how we can use this sponsorship and those benefits to connect with Heritage Bank target markets.
- ✓ Timeline, including important deadlines.

Submitting Your Proposal

When you submit your proposal it will be reviewed by the Heritage Bank Sponsorship Team. You will be notified of the decision within 6 weeks.

Regional and national sponsorship opportunities should be submitted to the Community & Sponsorship Manager at sponsorship@heritage.com.au

Local sponsorships can also be submitted to your local branch.



General Guidelines

- We will consider proposals in all categories with the exception of political or religious related activities.
- We require all proposals to fit into our "Helping Hands" theme. (See "Helping Hands")
- We require all properties to be active within the regions we service. (See Target Markets)
- We pursue sponsorship exclusivity in the financial institution's category.
- We generally need a minimum of six months' lead time to effectively plan and implement our leverage activities.
- Logo and/or name exposure is considered a value added asset but is not the primary goal of sponsorship.
- We prefer to invest in sponsorships which carry out audience research during and/or after the event and subsequently provide results to Heritage Bank.
- We expect our sponsorship partners will invest a minimum of 10% of the total value of the sponsorship to proactively adding value to Heritage Bank.

Other Support

We can also provide support in the form of:

Giveaways

Subject to availability, sponsorship assistance may be provided via a range of giveaway prizes and promotional items.

Community Assets

Additional support items such as marquees, signage, or large novelty cheques.

Visit your local branch, call 13 14 22
or visit [heritage.com.au](https://www.heritage.com.au)

Heritage Bank
People first.