



Sponsorship Guidelines & Application Form



We recognise the important role that our local communities play in helping Fonterra realise its potential as a business both now and in the future. Fonterra is committed to sustainable dairying and supporting the communities where our staff, shareholders, suppliers and their families live and work because we are proud of our New Zealand roots.

Helping to maintain healthy, vibrant communities is an important aspect of building a truly sustainable business. We are committed to programmes which uphold our beliefs around quality, safety and innovation and that give back to our diverse communities.

We say thank you and show our support for community activities which share our vision, values and co-operative spirit through our four New Zealand sponsorship initiatives; the Fonterra Science Roadshow, KickStart Breakfast: our school breakfast programme, Fonterra Milk for Schools: recently announced pilot in Northland and Catchment Care: which focuses on enhancing water-catchment areas.

In addition we offer local community based support through the Fonterra Grass Roots Fund. As a Farmer Co-operative we are dedicated to supporting the social needs of current and future generations as well as initiatives that aim to take care of community wellbeing in rural areas.

This fund is distributed through a network of seven regional Sponsorship Committees across the country. These Sponsorship Committees manage, approve and support local sponsorship initiatives from \$500 to a maximum of \$5,000 per application. To be considered for support your initiative/ activity must fall into one of the following areas:

1. Encouraging Innovation and/or Science

We are dedicated to encouraging innovation and science education as it is vital to not only Fonterra's long term sustainability but also to the success of our economy.

Examples of previous sponsorships include:

- Encouraging young people to pursue careers in dairy, science and technology such as university open/ career days
- Supporting regional science fairs

What we will not support:

- National conferences

2. Caring for our Environment

We are committed to sustainable business practices from our farms to our end products.

Examples of previous sponsorships include:

- Sponsoring environmental projects such as landscaping/developing/cleaning a local park
- Recycling programmes
- Supporting school environmental initiatives, for example worm farms
- Riparian planting

What we will not support:

- Activities on private land
- Large scale projects

3. Bringing Communities Together

We understand the importance of bringing people together to encourage community spirit. We support activities which have a strong connection to the dairy industry and those that help people become stronger, healthier and more active in their everyday lives.

Examples of previous sponsorships include:

- Assisting rural events such as calf club days
- Activities that add value to the dairy industry at a grass roots level
- Local business award programmes where there is a strong dairy angle, benefit or association
- Branded merchandise to support local junior sports teams going to national tournaments

What we will not support:

- Non-specific fundraising projects or appeals
- General building construction or maintenance
- Programme establishment, operating or ongoing salary costs
- Sports teams except for merchandise to junior sports teams attending national tournaments
- Clubs with exclusive memberships that are not open to the public
- Foodbanks
- Product donations which are then sold to raise funds
- Trips with requests for travel, accommodation and food costs
- Naming rights for conferences and exhibitions with no dairy angle
- Activities which take place outside of the region
- Requests to cover promotion and advertising costs of initiatives
- Community notice boards

4. Making our Communities Safer

We are passionate about ensuring our people within our communities are safe throughout their daily lives

Examples of previous sponsorships include:

- Initiatives which look after our children's health and safety
- Supporting emergency response services

What we will not support:

- Safety initiatives that look at broader community safety such as mental health, restorative justice or family violence awareness initiatives
- Community watch programmes

Please note that even if your sponsorship request falls within one of these categories there is no guarantee your initiative will be sponsored. All areas that 'we will not support' apply across all categories. If your sponsorship request does not fall into one of the four areas above it will not be eligible for sponsorship.

In addition the programme will also not sponsor the following:

- Individuals
- Activities which take place outside of New Zealand
- Projects promoting political, religious or military organisations
- Requests in excess of \$5,000
- Organisations associated with tobacco, drug or alcohol consumption
- Organisations with values inconsistent with Fonterra's values
- Activities that are sponsored by a competitor
- Activities that may be construed as discriminatory
- Activities that could be detrimental to public health or safety
- Donations to a candidate or political party in connection with political elections

Sponsorship Guidelines (*cont'd*)

How to apply for sponsorship:

If you feel your sponsorship request fits within the criteria set out above please fill in this application form and either email or post to the Sponsorship Committee that covers your region. A list of regions and addresses can be found on page 11 of this application form.

All completed applications are subject to an approval process and will be marked against the application criteria on page 12.

There are three funding call periods throughout the year as outlined below. If you want to apply for sponsorship during this time please ensure you submit your application form prior to the application assessment date. We will respond to you during the timeframes listed below.

First call for applications: Applications assessed: Response to applicants:	22 nd August – 23 rd September 2011 26 th September – 30 th September 2011 By 31 st October 2011
Second call for applications: Applications assessed: Response to applicants:	1 st November – 30 th November 2011 1 st December – 31 st December 2011 By 30 th January 2012
Third call for applications: Applications assessed: Response to applicants:	1 st March – 31 st March 2012 1 st April – 30 th April 2012 By 31 st May 2012

Save and submit your form electronically

Using Adobe Acrobat Reader (7 / Reader X) you should be able to save, fill in the form electronically and email directly using the email buttons above. We recommend saving your completed form for your records before submitting.

Required form fields should appear highlighted red on your screen, you will not be able to submit the form electronically if these fields are not populated. **Remember to attach evidence of bank account details.**

Sponsorship Application Form

*(It is essential that all sections of this document are complete.
Incomplete applications will not be considered)*

Office Use Only

Application Number:

Date received:

Application Details

Contact name of applicant:

Name of organisation:

Trading Name (if different from
above):

Type of organisation:

- ☐ Incorporated Society
- ☐ Charitable Trust
- ☐ School
- ☐ University
- ☐ Hospital/hospice/healthcare
- ☐ Small/start-up business/social enterprise
- ☐ Local community group
- ☐ Emergency services
- ☐ Other

Registration Number:

Registration Number:

Institution Number:

Institution Number:

Details:

Is your organisation GST registered?

☐ Yes ☐ No

If yes, please state your GST number:

Organisational objectives:

Contact phone number(s):

Email address:

Website address:

Postal address (please include
district and postcode):

Physical address (please
include district postcode):

Previous Sponsorship

Have you or your organisation applied for sponsorship at Fonterra before?

☐ Yes

☐ No

If yes, was the previous application successful?

☐ Yes

☐ No

If yes, please fill in the following:

Name of activity / programme:

Name of applicant:

Name of organisation:

Date of application:

Name of Fonterra staff member you dealt with (if known):

Name of Fonterra business unit (if known):

What support was received?

If monetary support, how much did you receive?

How did you hear about the Fonterra Grass Roots Fund?

Newspaper

☐ If so which one?

Radio

☐ If so which one?

Online/ website

☐ If so which one?

Friend/ Colleague

☐

Other

☐ Please explain

Sponsorship Details

Please select the category your sponsorship request / activity falls under:

- | | |
|--|---|
| <input type="checkbox"/> Encouraging Innovation and/or Science | <input type="checkbox"/> Caring for our Environment |
| <input type="checkbox"/> Bringing Communities Together | <input type="checkbox"/> Making Communities Safer |

Name of activity / programme:

What are the objectives of the activity / programme?

Please provide details of your sponsorship request:

Start date of activity / programme:

End date of activity / programme:

Location of activity / programme
(please include district):

What is the specific need in the community and how will this activity / programme address this?

Are there key stakeholders / partners in this activity / programme?

☐ Yes ☐ No

If yes, please describe how they are involved

Sponsorship Details (*cont'd*)

Please provide a short description about the qualitative and quantitative outcomes this sponsorship will bring to the community. Please fill in any of the applicable categories below:

Category	Examples	Indicative Numbers	Description of Outcomes
<input type="checkbox"/> People	<ul style="list-style-type: none"> Making a positive change in people's attitude or behaviour e.g: eating more healthily, positive attitude to subjects (e.g. science) Skills and personal development e.g: increased employability, business skills Making a direct impact on people's quality of life e.g: increased community safety, enabled engagement in the community 	Number of people positively impacted: _____	
<input type="checkbox"/> Groups / Organisations	<ul style="list-style-type: none"> Capacity Building e.g: provide new services / product, make cash savings / improve financial situation, increased / improved public profile, train staff / volunteers, access to other sources of funds / resources 	Number of groups / organisations: _____	
<input type="checkbox"/> Environment	<ul style="list-style-type: none"> Direct environmental impact e.g: Protect and / or replant tree stocks, protect endangered species, improve / conserve waterways, conserve protected land / sites, reduce greenhouse gas emissions, decrease waste to landfill Impact on human activities e.g: reduced water usage, people engaged on environmental issues / activity 	Number of plants, trees, etc.: _____	

Budget Allocation

What is the total budget for the activity? \$

What amount are you requesting from Fonterra? \$

Is a GST component applicable for this activity? ☐ Yes ☐ No

What does the Fonterra budget cover? (Please provide details of amounts where relevant)

Please attach quotes if applicable ☐ Attached

Promotion and Evaluation

Are there opportunities for Fonterra staff and / or farmers to take part in the activity?

☐ Yes

☐ No

If yes, what are the opportunities?

Is there opportunity for Fonterra to become the primary sponsor?

☐ Yes

☐ No

If yes, please explain further

How do you plan to launch and promote the activity?

Are there branding opportunities available for Fonterra?

☐ Yes

☐ No

If yes, please explain further

Are there opportunities to involve local media?

☐ Yes

☐ No

If yes, please explain further

What other sponsors have been contacted and / or committed to support you?

How will you evaluate the success of the activity / programme?

Is there any other information you believe is relevant to support your application?

Payment Details

Are you an existing vendor / supplier to Fonterra?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please provide your vendor / supplier number: _____
If your application is successful how would you like to receive payment? (Please tick the appropriate box below)	

☐ **Direct Credit Details:**

Bank:	
Account Name:	
Account Number:	

Please attach evidence of your bank account details i.e. invoice or deposit slip. ☐ Attached

☐ **Cheque Details:**

Name to be written on cheque:	
Postal Address:	

Checklist

<input type="checkbox"/> I have completed all sections of the application
<input type="checkbox"/> I have attached evidence of bank account details (if ticked via direct credit)
<input type="checkbox"/> I have attached copies of quotes where applicable
<input type="checkbox"/> I have read the assessment criteria as listed on page 11
<input type="checkbox"/> I have kept a photocopy of this application form for my own records

Your Obligations

If your application is successful you agree and acknowledge on behalf of yourself and your organisation, group or other entity applying for the sponsorship the following:

- ☐ I agree to invoice Fonterra for the full sponsorship amount (if applicable) **OR**
- ☐ I agree to acknowledge receipt of the sponsorship amount by providing the relevant Sponsorship Committee with a letter stating activity name and amount received (on a company letterhead).
- ☐ I agree to let the relevant Sponsorship Committee know when payment has been received.
- ☐ I agree to ensure that the sponsorship amount and any products or services received as part of the sponsorship will be used solely for the activities specified in this application and for no other purposes.
- ☐ I agree I may not refer to Fonterra as a sponsor of the activity or programme which is the subject of this application unless this application is successful.
- ☐ I agree to provide feedback about the activity to the relevant Sponsorship Committee and provide photos if available within a timeframe of one month following the sponsored activity
- ☐ If this application is on behalf of an organisation, group or other entity I confirm that I have informed them of this application and will provide acknowledgement of sponsorship receipt via the entity supported (i.e. on official letterhead or alternative official means).
- ☐ I acknowledge that any decision made by Fonterra's Sponsorship Committees is final. I accept that no reason for any decision needs to be given, nor will any correspondence be entered into.
- ☐ I confirm that where this application contains personal information relating to any person, those persons have authorised the provision of their personal information by the applicant to Fonterra for the purpose of this application and for the purposes of fulfilling the requirements of any sponsorship granted.
- ☐ I acknowledge and agree that if I fail to comply with any of the above obligations, the Fonterra Sponsorship Committee may take action to terminate the sponsorship including, but not limited to, by requiring refund of any sponsorship amounts and/or by requiring you to cease referring to Fonterra as being associated with your entity or organisation in any way.

I am authorised to make this application and hereby confirm that all the information in this application is true and correct and that I will meet all obligations listed above.

Name of applicant

Signature

Date of application

Application Submission

Thank you for your application. All applications are subject to an approval process. For assessment and approval periods please see page 3. All applications become the property of Fonterra once submitted and Fonterra will not return copies of any submitted application. Completed applications must either be emailed or posted to:

REGION	REGIONS COVERED	CONTACT	POSTAL ADDRESS	EMAIL
Northland	Northland to Auckland City	Northland Sponsorship Committee	Fonterra Grass Roots Fund Private Bag 92032 Auckland 1142	
Central North Island (North)	Auckland South to Waikato (including Hamilton, Te Rapa, Morrinsville, Te Aroha, Waitoa)	Upper Waikato Sponsorship Committee	Fonterra Grass Roots Fund Private Bag 92032 Auckland 1142	
Central North Island (Mid)	Remaining Waikato (including Cambridge, Te Awamutu, Hautapu, Otorohanga, and Te Kuiti)	Lower Waikato Sponsorship Committee	Fonterra Grass Roots Fund Fonterra Hautapu Private Bag 885 3450 Cambridge	
Central North Island (South)	Greater Bay of Plenty region (including Lichfield, Tirau, Tokoroa Edgecumbe, Rotorua, Reporoa, Whakatane, Opotiki, Taupo), Gisborne and Hawkes Bay	Bay of Plenty Sponsorship Committee	Fonterra Grass Roots Fund Fonterra Edgecumbe Private Bag 1 3160 Edgecumbe	
Lower North Island	Taranaki, Manawatu- Wanganui and Wellington	Lower North Island Sponsorship Committee	Fonterra Grass Roots Fund Private Bag 92032 Auckland 1142	
Mid/ Upper South Island	Tasman, Nelson, Marlborough, West Coast, and Canterbury	Upper South Island Sponsorship Committee	Fonterra Grass Roots Fund Private Bag 92032 Auckland 1142	
Lower South Island	Otago and Southland	Southland Sponsorship Committee	Fonterra Grass Roots Fund Private Bag 92032 Auckland 1142	

When posting application please remember to state relevant sponsorship committee on the envelope.

Privacy Act: Any organisation or personal information you provide will be held by Fonterra and the Fonterra Rebuilding Communities Committee in accordance with the Privacy Act 1993 and will be used for the purposes of:

- Administration and assessment of your donation request;
- Provision of any donation;
- To third parties where we have retained those third parties to assist us to provide the donation;
- To different entities within Fonterra, to enable the development and marketing of other products and services and to improve our customer service in general;
- Where otherwise legally permitted.

You may request access to or correction of your personal information by contacting Fonterra or the Fonterra Rebuilding Communities Sponsorship Committee.

Product and food safety: where we provide you with product as part of the sponsorship you agree to follow all our instructions with respect to storage, handling and use of product and agree not to resell any product (unless Fonterra has specifically agreed to such resale as part of the sponsorship).

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Office Use ONLY*(To be completed by Fonterra)***Office Use Only:**

Submission Acknowledgement by Email / Letter:

Date sent:

Application Assessment**Essential criteria:**

Activity fits within set criteria on page 1

☐ Yes☐ No

Activity has clear objectives

☐ 1
Unclear☐ 2
Clear☐ 3
Very clear☐ 4
Excellent

Tangible community outcomes

☐ 1
Little or no contribution☐ 2
Some contribution☐ 3
Good contribution☐ 4
Significant contribution

Sponsorship aligns with Fonterra's vision, values and sponsorships

☐ 1
Little or no alignment☐ 2
Some alignment☐ 3
Good alignment☐ 4
Significant alignment

Vision:

The natural source of dairy nutrition for everybody, everywhere, every day

Values:

Co-operative spirit
Do what's right
Challenge boundaries
Make it happen**Important criteria:**

Positive media Opportunities

☐ 1
None☐ 2
Some opportunities☐ 3
Good opportunities☐ 4
Significant opportunities

Branding Opportunities

☐ 1
None☐ 2
Some opportunities☐ 3
Good opportunities☐ 4
Significant opportunities

Opportunity for employee or shareholder involvement

☐ 1
Low☐ 2
Some☐ 3
Good☐ 4
Excellent

The sponsorship is a good Return on Investment (ROI)

☐ 1
No ROI☐ 2
Low ROI☐ 3
Good ROI☐ 4
Excellent ROI**Comments**

Office Use ONLY

(To be completed by Fonterra)

Motivation for contribution (links to LBG reporting*)

<input type="checkbox"/> Charitable Donation		
<input type="checkbox"/> Community Investment		
<input type="checkbox"/> Commercial Initiative:	Total cost \$ _____	Community Investment \$ _____

Definitions (as defined by LBG*):

Charitable donation:

Intermittent support in response to needs and appeals of charitable community organisations. Donations may be cash, product, facilities, or employee time.

Community investment:

Long term strategic involvement in community partnerships to address a specific range of social issues. Community investment costs may include: cash contributed through community programmes to achieve specific goals, donations of computers / equipment central to the success of the project / activity.

Commercial initiatives:

Activities in the community to support success of company (such as increased profitability, stronger company image, reduced costs, or improved customer loyalty) in partnership with charities and community based organisations. Commercial initiatives may include payments to non-profit organisations as a result of cause-related marketing, or other brand promotion, or sponsorship of charitable events where they are related to the company's marketing strategy. In these situations only the cost directly attributable to the community, not the whole cost of the marketing initiative should be counted.

*LBG stands for London Benchmarking Group. The LBG model provides a systematic and consistent way of collecting, collating and reporting corporate community investment.

Benefits to the business

Please provide a short description of the benefits the activity brings to Fonterra

Staff Volunteering

Staff numbers involved in company time (if applicable):

Activity hours:

Total hours volunteered in company time:

Value of contribution

Value of cash contribution (if applicable): \$

Value of in-kind* contribution (if applicable): \$

Total value of sponsorship: \$

***In-kind contributions:** that is non-cash resources which are valued at what it has cost the company to make, not at what the beneficiary organisation would otherwise have had to pay in the open market. Examples include donations of product, use of company premises, contributions of used office equipment.

Approvals

Ratified by Sponsorship Committee?

☐ Yes ☐ No

☐ Provisional on additional information

If provisional what additional information is required:

If no, record reasons:

Applicant informed of decision: _____

Date contacted: _____ By whom: _____