



Community Investment Program Guidelines 2024

Churchbridge Credit Union is committed to investing in a better community that our current members and generations to come will benefit from. Since developing our **Community Investment Program** in 2011, we have created a legacy of community-based projects.

Policy for Substantial Donations

The Churchbridge Credit Union believes companies such as ours have the ability and the responsibility to step forward to support the social, cultural and economic enrichment of our communities. To maintain our commitment to our communities, Churchbridge Credit Union sets aside an annual pledge of up to 1.5% of pre-tax profit to non-profit organizations for substantial donations.

Each year the Churchbridge Credit Union will accept applications from our area organizations for a specific project or program. These applications will then be evaluated using our eligibility guidelines by our selection committee, which consists of board members, management, and staff of the Churchbridge Credit Union.

Organizations will only be considered once per year for a substantial donation and must complete a Substantial Donation application form.

Policy for Other Donations

Churchbridge Credit Union donates to non-profit organizations to encourage the development of a broad base of support for all charitable organizations. Requests for this type of funding are considered throughout the year. Contributions may include monetary donations, time donations, or other donations which may include promotional or fundraising items.

These proposals will be evaluated using our eligibility requirements by the appropriate staff member within the Churchbridge Credit Union.

Eligibility

The Churchbridge Credit Union uses the following guidelines as a basis for our Community Investment Policies:

- ✎ Application must be submitted by **April 30, 2024**.
- ✎ Donation will benefit a non-profit organization.
- ✎ Organization or group **must be** a member of the Churchbridge Credit Union.
- ✎ Organization is within the Churchbridge Credit Union trading area.
- ✎ Event and/or organization will create positive public relations recognition of the Churchbridge Credit Union.
- ✎ Organization/event supports development, benefits, or fulfills a recognized need within the community.
- ✎ Organization/event supports the health, wellness and education of youth, adults, and seniors such as clinics, camps, workshops, and entertainment that do not fall under standard operating costs.
- ✎ Request is within Churchbridge Credit Union's budget.
- ✎ Organization/event is significant to membership and the community.
- ✎ There is an opportunity for exposure/advertising for the Churchbridge Credit Union. This may include the use of the Churchbridge Credit Union's logo on printed material, verbal or written acknowledgement, display of banners or brochures, plaques, or naming rights.
- ✎ Corporate priorities include health, wellness, youth, education, arts, culture, and recreation.
- ✎ Upon approval, the project must be started, and funds must be used by December 31 of the year the money is granted.
- ✎ Recipients will be notified in May and recipients must be able to send a representative to the Community Appreciation BBQs for the presentations: May 29 in Churchbridge and May 30 in Langenburg.

Funding will not be provided for:

- ✎ Political or religious organizations
- ✎ Advocacy organizations whose causes are publicly controversial.
- ✎ Individuals
- ✎ Conferences
- ✎ Events or organizations that take place outside of our trading area.
- ✎ Operating costs
- ✎ Projects previously funded

✖ Organizations/events that represent a conflict of interest to the Churchbridge Credit Union.

✖ Individual teams or small sports organizations that do not benefit a significant portion of our community.

Preference will be based on the following Criteria:

✖ Community and economic development.

✖ Benefits many people in the community and the local trading area.

✖ Organizations can be funded more than once, but a project cannot.

✖ Provides the most exposure for Churchbridge Credit Union.

Churchbridge Credit Union requires the following prior to disbursing the Community Investment funding:

✖ Proof of project payment receipt.

✖ Funding is requested by the end of the year the money was granted.

✖ Recognition requirements have been discussed and will be implemented as soon as possible.