

## Community Involvement Policy

SouthWest Community Credit Union strongly believes in giving back to the communities that support us as their local credit union. Our community involvement goal is to reach further into our field of membership and have the most positive impact possible on the communities and members we serve. We will provide support financially and through our volunteer network of employees. It is our Community Service Committee and employee representatives from every branch that spear-head these community efforts. These dedicated employees plan and organize our community service activities and rally their co-workers to participate.

Below are some basic guidelines that SouthWest Community follows for making donations, though exceptions may be made in the case of a special need or opportunity.

### Guidelines

1. SouthWest Community may make contributions of employee time, premiums, property, or monetary donations.
2. Our primary focus on monetary charitable contributions will be to those organizations, events, projects, and programs that adhere to the credit union's philosophy of building valued relationships.
3. Our focus for community events will be to organizations/events that will provide us with high visibility and generate positive goodwill/publicity for the credit union within that community.
4. For contributions/involvement to be considered:
  - a. Requests for monetary donations must be in writing and submitted to SouthWest Community. It must be a local civic, charitable or academic non-profit organization/event. A local organization will have its membership and operations within SouthWest Community's field of membership. This may include local chapters of national organizations.
  - b. Organizations, projects or events must provide a significant benefit to a considerable portion of SouthWest Community's membership and/or communities within which they live.
  - c. Organizations, projects or events must be of interest to our staff, members and/or volunteers.
  - d. Preferably, it will provide a benefit to SouthWest Community through positive publicity and community good will.
5. Examples of acceptable organizations that we will support include:
  - a. American Cancer Society
  - b. Dixie Care & Share
  - c. United Way Dixie
  - d. March of Dimes
  - e. The Foundation of DRMC
  - f. Habitat for Humanity
  - g. Foundation of Valley View Medical Center
6. These contribution requests will not be considered:
  - a. Organizations or causes that do not impact the credit union service area.
  - b. For-profit organizations.
  - c. Donations for individuals, except in rare instances such as personal or family disaster. Examples that will not be considered: trips, beauty pageants, livestock raising, etc.
  - d. Charity-only requests.

- e. Religious or church organizations, except for specific humanitarian missions. Because our members have diverse spiritual backgrounds, it is very difficult to contribute equitably.
  - f. Political/partisan endorsements.
7. Certain organizations may be “grand-fathered’ that no longer fit within our criteria if it is determined to be of continued value for our support.
  8. Monetary contribution requests must be approved by the Marketing Coordinator or the Executive Management Team.

### Community Involvement Request Procedure

When approached with a request for support within the branch, staff should refer individuals to the Marketing Coordinator or a member of the Executive Management Team. In the event the organization does not have written information describing their mission and/or sponsorship opportunities, a “Request for Credit Union Contributions” must be completed by the organization and forwarded to the Marketing Coordinator at the Administration Office. Staff should not agree to Credit Union support prior to marketing or management approval.

## Request for Credit Union Contributions

We are committed to supporting and strengthening our community, making it a better place to visit, work, and live. We have established a set of criteria to be used in determining our community support dollars. SouthWest Community Credit Union focuses its community support on health, education and youth within our field of membership.

Please fill out the following information and return with any supporting documents.

Organization \_\_\_\_\_ Contact Person \_\_\_\_\_

Telephone Number \_\_\_\_\_ Email Address \_\_\_\_\_

Address of Organization \_\_\_\_\_

*\*Please write on a separate sheet of paper if needed. Please ensure that all questions are completed.*

1. What is your organization's purpose?
2. What amount of funding is being requested?
3. What will the funding be used for?
4. What are the demographics of your target market? (age, income, where do people live, etc)
5. What are the plans for publicity for this project, and how will SouthWest Community Credit Union be included? What other supporters are participating in this event?
6. In what ways other than media will SouthWest Community be recognized?
7. Is your organization willing to allow SouthWest Community Credit Union to send a direct mail piece to your membership and employees/volunteers announcing our contribution? If yes, how many members and employees/volunteers do you have?
8. What are your deadlines?

Please fax or email this form back to the Marketing Coordinator, SouthWest Community Credit Union at (435) 688-9099 or [marketing@southwestfederal.com](mailto:marketing@southwestfederal.com).