



Contribution Involvement and Contribution Policy

Community First's Vision is to be the most trusted, respected and service-oriented financial institution serving our market. An integral part of realizing this Vision is to strive to be known as the most community minded financial institution, engaging the talents of our staff at every level of the credit union to improve the quality of life where we live, work and play. To this end, we place a special emphasis on activities that, improve financial literacy, enhance the quality of our educational system, upgrade the health and welfare of our community and provide the underprivileged financial tools and assistance to improve their standard of living. Community First receives many solicitations for donations, volunteer support and community sponsorships. The following policy provides guidelines for how requests are handled. These guidelines help assure that Community First's financial resources are used in a way that best serves the majority of our membership and strengthens our brand within the community. These guidelines will not cover every possible request, special need or opportunity; therefore, Community First may make exceptions to this policy based on extenuating circumstances.

Contributions/Donations

Community First makes contributions to non-profit organizations that serve the communities in which the majority of our members and potential members work or live. In general, support is given to organizations that improve financial literacy; enhance the quality of the educational system; improve the health and well being of our community and help underserved citizens improve their standard of living by adopting sound financial practices.

Community Sponsorships

Community First considers for sponsorship only those civic, recreational or charity events or programs located within our geographic service area. As a guideline, by sponsoring an event or organization, Community First, in turn, expects to be recognized for the sponsorship in the form of receiving positive publicity, receiving advertising in relevant publications related to the event or organization, or receiving some form of public recognition from the organization or group requesting sponsorship.

Guidelines for approving contributions:

- Requests for sponsorship must be made in writing to the Contribution Committee.
- Requests for donations must include a completed "Donation Request Form" and W-9 form (available at www.irs.gov).
- Contributions must be made to non-profit organizations. The organization will be asked to provide a government-issued non-tax identification number. In general, support is given to organizations that meet the guidelines described in the above paragraph.
- Requests from Community First members and Select Employer Groups (SEGs) will be given priority over requests by nonmembers.
- The requesting organization, event or program must be aligned with Community First's Vision and Core Values.
- Community contributions may be in the form financial contributions, in-kind donations, staff hours volunteered or some combination thereof.



The following requests will generally not be considered:

- Community First will generally not contribute to a religious organization, because of the spiritual diversity of our membership unless it involves an existing or prospective SEG and the funds are used in a manner consistent with the guidelines contained in this policy.
- Community First will generally not make contributions to specific political candidates, but we will support the Credit Union Political Action Fund (CUPAC) and may support the non-partisan organizations that encourage citizens to vote.
- Community First will not contribute to organizations or causes outside our service area unless there are direct benefits derived that can be linked to our service area.
- Community First will generally not make donations to individuals or groups benefiting a small group of people, such as classroom field trips, beauty pageants, sports programs and persons sustaining losses because of illness or other adverse circumstances. Other avenues will address these special circumstances, including providing employees and members the opportunity to contribute with Community First's role limited to being the intermediary for gathering and forwarding amounts raised.
- Community First will not contribute to any organization that discriminates according to race, color, religion, sex, age, marital status, national origin, citizenship status, disability or veteran status.
- Community First will not permit an organization to solicit contributions on Community First property.

Organizations previously funded

Organizations previously funded may not meet the guidelines; however, if the committee determines there is a compelling reason to continue support, a contribution may be made if the Donation Request Form is completed. If the committee determines that an organization previously supported no longer meets the guidelines, provisions will be made for phasing out support.

Follow up and tracking

- Community First will track the dollars, in kind contributions and employee hours throughout the year and develop periodic reports that reveal where resources are expended. Additionally, and to the extent practicable, we will measure the efficiency of our community involvement by activity and adjust our involvement to best fulfill Community First's Vision.



Community First Credit Union Donation/Sponsorship Request Form

Please complete and submit the following donation/sponsorship request form and the W-9 form (available at www.irs.gov) to the Contribution Committee to ensure a prompt reply to your request. **If you have questions, please call**

Michelle Hunter, Mortgage Department

Phone: 904.549.8765 • Fax: 904.549-8725 • e-mail: michellh@c1cufl.org

Request Date: _____ Date for response from Community First: _____

(Please Allow 30 Business Days)

Name of Requestor: _____ **Phone:** () _____

Requestor's affiliation with Community First: Member Spouse/Child of Member SEG (Select Employer Group)

Other (Please specify) _____

Organization's Name: _____ **Organization's Phone:** () _____

Address: _____
Street Address City State Zip

1. What amount of funding is being requested? \$ _____
2. Has Community First contributed to this charitable organization in the past? Yes No
3. Is your organization non-profit? Yes No
4. What type of local service does this organization provide?
 Financial Literacy Educational Health & Well-being of the Community Serving the Underserved
 Other (Please specify) _____
5. Will organization or project directly provide a benefit to a significant portion of Community First's members and potential members and/or the communities in which they live? Yes No
If yes, in what way? _____
6. Will Community First receive public recognition from this organization or project? Yes No
If yes, in what way? _____
7. Item(s) requested:
 Advertising (describe) _____
 Cash (amount) \$ _____
 Auction, raffle, prize merchandise (describe) _____
 Donated staff hours _____
 Other (describe) _____
8. For what purpose(s) would the donation be used? _____
9. Is your organization willing to allow Community First to market to your membership and employees/volunteers? Yes No
If yes, please describe how you would promote the credit union. _____
10. Please provide any other information related to this request you believe would be helpful in allowing our committee to decide.
