

Nelson & District Credit Union's (NDCU) Community Investment Program (CIP) was created to assist our communities to thrive with funding assistance specifically towards education, community, economic development, social responsibility, wellness, recreation and arts, culture & heritage.

1. Requests must be in writing on the attached form with supporting documents that can include:
 - budgets
 - financial statement
 - annual report
 - images
 - expected outcomes
 - list of directors or officers
2. Applicant must have a proven record of financial accountability and sustainability.
3. Any and all requests will be reviewed by: our Branch Representative(s) and/or our Community Investment Program Team and/or our Board of Directors. Allow approximately two months for a decision to be made, while large donation requests and complex applications may take longer.
4. Applicants that have their account at, or willing to move their account to NDCU, are given priority.
5. NDCU will endeavour to support local community programs that our (1) members are involved in and (2) our employees and/or Directors are involved in. Even though a member may be involved, often national or international initiatives fall outside of its sponsorship mandate.
6. Sponsorship will not be considered when applicant is seeking funding for:
 - research, surveys and/or studies
 - wages, salaries and/or employee benefits
7. When determining the size of our donation (whether it's cash, cash in-kind or prizes), groups, organizations and teams will take consideration over individuals. Those applicants that benefit the most people will get a greater preference.
8. We are particularly supportive of programs that involve co-ops and credit unions.
9. We will not become involved with any individual or organization that is perceived by Nelson & District Credit Union's Management and/or Directors to be fraudulent, controversial or irresponsible.
10. Due to the number of donation requests this credit union receives on an annual basis we cannot always approve every request. Each request will be given fair consideration based upon the criteria above and the current state of the CIP budget. **Receiving a donation in one year does not mean NDCU can/will make a similar commitment in following years.** On-going commitment will be reviewed with consideration to the future success, viability and sustainability of the request.
11. Successful applicants must complete a post status report for projects funded with financial support greater than \$1000. Recipient must be willing to receive a short community investment presentation at a future board meeting or a personal meeting, for individual applications, if requested by NDCU.
12. By submitting this completed and signed document you hereby authorize **Nelson & District Credit Union** to collect, use, and disclose your personal information as follows for use and publication:

Type of Personal Info: -Photo(s) -Bio info provided by member to NDCU -Other

Purpose, Use, and Type of Disclosure/Publication: -Newsletter(s) -Annual Report
-NDCU Website(s) -Media Release(s) (Newspaper, Radio, Web) -Other

Purpose(s) & Use(s):

-Provide info to Staff, Members, and Community -Promote NDCU
-NDCU elections -Other

If consent is withdrawn, applicant(s) acknowledge that existing publications will not be withdrawn.

APPLICATION

Date of application: _____

Date funds required: _____

Name of individual/organization applying for donation:

Number of members/participants in this organization: _____

Amount / donation requested: \$

Do you or your organization have an account with this credit union?

YES (Acct. No. _____) NO

If No, Why?

Contact person: _____ Position/title: _____

Phone: (H) _____ (B) _____

(C) _____ Email: _____

Address (include postal code):

Purpose of request (i.e., what will you be doing with the donation?)

The scope of this initiative is: Local Provincial National International

This sponsorship will contribute to: Social Responsibility Sports & Recreation

Arts, Culture & Heritage Economic Development Community Life

Health & Wellness Schools other: _____

Explain how our sponsorship will benefit your previous selection(s):

Is this organization a: Registered Canadian Society (society reg # _____)

Company Club Team School Affiliated Association

other: _____

Has the individual/organization received support from Nelson & District Credit Union in the past? YES NO

If YES, When?

Is the individual/organization receiving financial support from others? YES NO

If YES, Who?

Is the individual or organization requesting/receiving financial support from another financial institution? YES NO

If YES, Who?

Please describe how Nelson & District Credit Union will receive positive exposure in the community from this donation:

Please describe how our communities will benefit from this donation:

Please list names and phone numbers of other people, companies or societies who may be consulted for information regarding this organization:

Would a representative of your organization be willing to be included in a photo, press release, marketing materials and/or willing to make a presentation to the Board of Directors either before, during or after the project for which you making a request?

YES (contact: _____) NO

Would you, your group or organization be willing to be publicly acknowledged?

YES NO

Anything else you would like us to know?

Signature(s) required in order to process this application: *This consent applies to all future uses and disclosures for the purposes set out on first page.*

Name:

Signature:

Name:

Signature:

Please complete the post status report, including any press materials, documentation and high resolution photos (> 1MB) upon project completion in jpeg/tiff format.

This information will be retained and reviewed along with any future applications made to the Nelson & District Credit Union - Community Investment Program.