

# Community Impact Program

Nelson & District Credit Union's (NDCU) Community Impact Program (CIP) was created to ensure our communities are positively impacted and can thrive. Funding assistance is available in these areas of impact:

- Education
- Economic Development
- Social Responsibility
- Sports & Recreation
- Arts, Culture & Heritage
- Health & Wellness
- Community Life

## EVALUATION CRITERIA

### What we support

- Alignment with:
  - Areas of impact
  - NDCU's mission of enriching lives locally
  - NDCU's aspirational strategic pillars
  - Co-operative principles
  - A meaningful impact towards community priorities
- Financial accountability, and project feasibility and sustainability
- Safety and inclusivity
- Affiliation with Credit Union and co-operative spirit
- Member, director or employee involvement
- Measurable scale of impact
- Avoidance of restricted funding areas **(e.g. salaries, research, controversial causes, personal gain, political parties or religious bias)**
- Strategic collaboration amongst community partners

## IMPORTANT INFORMATION

- A complete and thorough application, accompanied by the appropriate supporting documents, enables our review committee to make timely and well-informed decisions about your application.
- Due to the number of donation requests NDCU receives on an annual basis, we cannot always approve every request to its full amount. Each request will be given fair consideration based upon the evaluation criteria provided and the state of funds available in the CIP.
- 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 impact, success, viability and sustainability of the request.
- All requests will be reviewed by our Community Impact 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.

**1. APPLICANT INFORMATION**

**You are a:**

- |              |                      |       |      |            |
|--------------|----------------------|-------|------|------------|
| Individual   | School               | Team  | Club | Foundation |
| Co-operative | Society/Organization | Other |      |            |

**Name of Applicant/Organization:**

Project Title:

Date of Submission:

Date Funds Required:

Applicant or Contact Person:

Applicant's role with organization:

Other key contact(s) and roles:

Mailing Address:

Phone Number:

Website:

Email Address:

Please list all of your social media channels and links to your social pages:

Have you received past support from NDCU?	Yes	No
Are you a member of NDCU?	Yes	No
If No, are you interested in moving your banking relationship to NDCU?	Yes	No
Can a member of our team reach out to you to discuss?	Yes	No

**2. FUNDING REQUEST**

Will your initiative be sustainable with partial or no funding from NDCU?      Yes      No

Type of Support Requested:      Cash      Prizes      Community Tent(s)

Total Amount Requested:

What percentage of the full project does this cover?

How will the funds be used?

Are other sponsors involved?      Yes      No

If Yes, list them, the financial or in-kind request you have made of them, and the status of the request:

Sponsor Name	Financial Request	Status
		Approved      Pending
		Approved      Pending
		Approved      Pending

Is your organization a CRA-Registered Charity?      Yes      No

**3. PROJECT OR EVENT DETAILS**

Is this a new event/initiative?      Yes      No

Scope:      Local      Provincial      National      International

Location:

Estimated number of people impacted?

What are the specific groups and demographics within our community that will benefit?

Brief Description of your Event or Initiative.

How does your event or initiative align with our mission and areas of impact (education, economic development, social responsibility, health & wellness, sports & recreation, arts, culture & heritage)?

How does this initiative ensure a safe, accessible and inclusive environment?

What does success look like?

How will NDCU be recognized for its support?

**4. SUPPORTING DOCUMENTS (REQUIRED)**

Please include with completed application:

- Project Budget (mandatory)
- Most Recent Financial Statement (if applicable)
- Annual Report (if applicable)
- List of names and phone numbers of other people, companies or societies who may be consulted for information regarding this application. (mandatory)
- List of Directors or Officers (mandatory)
- Letters of Support (optional)
- Images or Promotional Materials (optional)

**5. ACKNOWLEDGMENT & CONSENT**

By signing below, you agree to:

Allow Nelson & District Credit Union to use name(s), photos, and project details of event in corporate/promotional/media materials, and online and on social media..

Successful applicants must complete a post status report for projects funded with financial support greater than \$5,000.

Participate in a follow-up meeting or presentation if requested.

**6. SIGNATURE(S)**

Required in order to process this application: This consent applies to all future uses and disclosures for the purposes set out within the application.

Name \_\_\_\_\_ Signature \_\_\_\_\_ Date DD/MM/YY

Name \_\_\_\_\_ Signature \_\_\_\_\_ Date DD/MM/YY

**Thank you for completing the CIP application and submitting the required documents.**

Our preference is to receive by email to [cip@nelsoncu.com](mailto:cip@nelsoncu.com). If email is not an option, please drop printed copies to your local NDCU branch.