



Charitable Contributions Policy **Member Request**

Part of our mission and purpose is to be involved in the communities we serve. This policy has been established to ensure that Clearview Federal Credit Union's charitable and financial resources are used in a way that follows our charter and best serves our membership. Philanthropic endeavors are not to be confused with the business development or marketing activity expenses of Clearview, for which there are separate budgets and accountability.

Charitable contributions will be aligned with the strategic direction of Clearview as determined by the Board of Directors.

1. Donations must be for a local civic, charitable or academic organization. A local organization will have its membership and operation within Clearview's service area. The organization must be able to provide proof of its 501 (c) 3 status.
2. Requests from Clearview members will be given priority over requests by non-members.
3. Clearview does not guarantee contributions year-to-year.
4. Clearview may make donations of money, property or services, including but not limited to employee volunteerism.
 - a. The time and talent of our employees and volunteers should be recognized as our greatest asset to support the community.
 - b. Clearview may allow use of its facilities for fundraising efforts or informational lobby displays when a Clearview employee or volunteer is present.
 - c. Financial Education – Clearview encourages employees to share their knowledge and expertise to increase financial literacy and improve economic conditions in our community. Speakers are available for a wide variety of topics related to personal finance, professional development, business and economics.
 - d. Clearview may provide Clearview logo items and/or other items for fundraising endeavors.
 - e. General Supplies – Clearview may donate general office supplies such as paper, paper clips, rubber bands, pens, etc.
 - f. Clearview may donate furniture and equipment that is no longer used by the Credit Union.
 - g. Professional Services – Clearview may offer assistance which may include, but is not limited to, graphic design, printing and consultation.
5. Because of the spiritual diversity of our membership, it is very difficult to contribute equitably to religious organizations. Clearview will not consider supporting religious organizations through the purchase of

advertising in a bulletin. However, Clearview will consider contributing to educational institutions associated with religious organizations for other functions such as picnics, raffles or auctions, etc.

6. Certain requests will not be considered:

- a. Organizations or causes that do not impact our service area. Exception: We may donate if there is significant local participation or support, or if the organization is holding an event or meeting in one of our communities.
- b. Donations for individuals, except in rare instances such as a personal or family disaster. Requests not considered: trips, scholarships, beauty pageants, modeling shows, sports programs and dinners to benefit an individual.
- c. Adult sports teams and leagues. Exception: We may donate if the team consists of one or more employees.
- d. Organizations or entities that discriminate on the basis of race, color, religion, sex, age or national origin.
- e. Political parties or partisan political campaigns.
- f. Organizations that might in any way conflict with Clearview's goals, mission, core values, philosophy and/or products and services.

7. In the event of duplicate requests for the same organization, the first one received will receive priority consideration.

Please follow the following procedures when submitting a request:

1. Review Clearview's Charitable Contributions Policy set forth to make sure your nonprofit organization is eligible for consideration.
2. Contribution requests must be submitted a minimum of 30 days prior to the donation due date. Clearview does not guarantee contributions year-to-year. The granting of each contribution by Clearview is at the sole and absolute discretion of Clearview.
3. You can find our donation/sponsorship request form by navigating to clearviewfcu.org/cares.
 - o Click the 'Make a Request' button under the donation or sponsorship section, whichever aligns with your request.
 - o Complete and submit the form.
4. Expect a decision from the Community Engagement Department within 30 days of our receipt of your request.

The intent of this policy is not to be exclusionary, but to help Clearview make decisions that will best support the interests of our members, our credit union, and our community. Because Clearview is a not-for-profit organization, our financial resources are limited. We cannot accommodate all eligible requests we receive. Criteria for evaluation and eligibility standards are subject to review and may change at any time as deemed prudent and necessary by the management of Clearview.