



Giving Guidelines

1. Funding request must support a cause related to education, financial literacy and/or meet basic needs of our community.
2. Consideration is given to local charitable organization that benefit to the communities of OCCU's service areas.
3. The requesting organization, event or program must be aligned with OCCU's vision (Enrich Lives) and values. Our goal is to help people thrive — not just our members, but everyone in the communities we serve. For more information about OCCU and our vision and values, click [here](#).
4. All organizations must provide their 501(c) (3) documentation and a statement of the organization's history and purpose. We also require purpose/intended use for the contribution.
5. Requests must be received at least 90 days prior to the event. We cannot fill requests without proper advance notification.
6. Please list any affiliation you have with OCCU.
7. Past support is not a guarantee of future funding.

Preference will be given to requests that:

- Are located within our membership areas.
- Reflect the vision and values of OCCU.
- Are relevant to a majority of our membership.
- Fulfill a recognized need and benefit the community at large and supports education, financial literacy and/or meets a basic need of our community.



We will not consider funding:

- Operating or administrative costs.
- Any group that represents a conflict of interest for OCCU.
- The promotion of religious beliefs.
- Individual or team travel or competition costs.
- Direct contributions to individuals or families.
- Classroom field trips.
- Organizations of a controversial nature.
- Religious organizations, except for non-sectarian programs that benefit the community at large.
- Organizations not providing services in communities served by OCCU.
- Political organizations or candidates or political/partisan endorsements.
- Any group which is not qualified as a nonprofit, tax-exempt organization as specified by the Internal Revenue Service.

PROCEDURES

Please submit your request at least 90 days prior to your event start date.

Requests are reviewed the first Tuesday of every month.

All eligible nonprofit organizations seeking consideration for support are required to complete an electronic sponsorship application.

Telephone, fax, mail, in-person and email requests will not be accepted. Due to the volume of requests we receive, the review process may take up to 60 days. We will make every effort to respond to your request within that time.

When completing the form, please fill out all required areas with as much detail as possible. You may include attachments or supporting documentation to support your request.