



Corporate giving guidelines

As a local, member-owned, not-for-profit financial cooperative, OCCU is invested in making a difference in the communities where our members live, work and play.

We believe investing in youth and education; financial literacy and basic needs helps to ensure a strong future for the community.

OCCU places great importance on being actively involved in our community.

If you would like to request funds, please fill out the sponsorship request form on our website. Please submit your request at least 90-days prior to your event start or need-by date.

We use the following guiding principles for our community giving. To be eligible for funding, your organization must be focused on at least one of our strategic priorities:

- **We support youth** – we give highest priority to funding requests that create opportunities for youth. Specifically, we want to advance educational access and success.
- **We believe in giving back to those in need** - whether that's through improving graduation rates or contributing to programs that alleviate food insecurities, we are committed to supporting underserved communities and helping those who need it most.
- **We care deeply about financial wellness** – as a financial cooperative, we know how vital it is to improve financial literacy and promote financial inclusion for all. We want to invest in organizations that provide financial education to youth, adults and vulnerable populations.
- **We give where our members live** - we seek to serve and actively contribute to the communities where our members and employees live and work.

Giving guidelines and eligibility

Requests must be from local 501(c)3 nonprofit organizations or schools in the communities we serve and must have a proven record of effective work.

While we strive to support as many causes in our communities as possible, we're unable to fulfill every request.

You are required to upload your organization's W-9 to be considered for funding.

All requests should be made at least 90 days prior to the event or given deadline. Responses can be expected within 60 business days from the time the request was submitted.

Thank you for taking the time to present our team with this giving opportunity!

We are thankful for all the nonprofits in our region and wish you the best of luck with your cause.

Nondiscrimination policy

OCCU does not discriminate on the basis of race, ethnicity, color, religion, gender, gender identity or expression, sexual orientation, disabilities, age, status as a veteran, national origin or any other protected class.

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.