



## **Community Investment Policy**

### ***Donation Guidelines and Request Application***

## **Community Investment**

### *Policy for Substantial Donations*

At Lakeland Credit Union, we recognize we can shape positive futures for the Lakeland area through day-to-day activities as a financial services provider, as an employer, and as an actively involved business member of the communities in which we live and do business.

We believe companies like ours have the ability and the responsibility to step forward to support the social, cultural and economic enrichment of our communities. Our corporate priorities include education, youth, health, arts, culture, sports, and recreation.

For many years, Lakeland Credit Union has worked hard to create standards for our corporate citizenship, charitable giving, ability to promote volunteerism, and community support. To maintain our commitment to community, Lakeland Credit Union sets aside an annual pledge of one percent of pre-tax profit to non-profit organizations.

### **Giving Guidelines**

LCU donates to non-profit organizations that are designated as registered charities by Canada Customs & Revenue Agency and educational institutions. Funding is targeted to specific projects or programs that add value to the scope of services offered by an organization. Finally, we encourage the development of a broad base of support for all charitable organizations.

Requests for funding are considered throughout the year. Organizations can normally expect to receive a response within 90 days as to whether their proposals are within LCU's giving criteria.

### **Financial Guidelines**

Regardless of the type of request or the origin, factors to be considered are:

- What percentage of the membership will benefit?
- What level of support has been provided for similar events or organizations?
- If no history exists, are we likely to have similar requests from like organizations in the future?
- What is the potential exposure for LCU?

## Donation Eligibility

LCU's support focuses on social responsibility in the communities it serves. As an active participant in Lakeland communities, we believe in the possibilities of personal growth and achievement through continuous learning and access to education.

Donations through LCU are intended to:

- **Assist educational, health and social services, civic and arts organizations that enhance quality of life particularly for youth;**
- **Support endeavors that benefit the community, and LCU members, employees and shareholders, improving the quality of community services;**
- **Encourage and support community-minded efforts and involvement of LCU.**

### *Exclusions*

Support will not be provided for:

- Religious organizations (except secular activities such as the operation of a home for the elderly open to those of all faiths).
- Organizations that discriminate on the basis of race, gender or religion.
- Individuals.
- Local, regional or provincial campaigns or agencies of, or affiliated with, a national organization that is already receiving a corporate donation.
- Political parties and organizations or lobby/advocacy groups that promote a particular social, political or economic ideology.
- Third-party organizations.
- Courtesy/goodwill advertising.
- Low-interest or no-interest loans.
- Direct mail solicitations.
- Retro-active funding will not be considered.

### *Terms*

In agreeing to fund a proposal, LCU may stipulate the terms of a donation and the proposed payment schedule for a multi-year commitment. LCU will consider only one donation per specific project on behalf of the same charitable organization each year. Additional requests will not be considered before the previous donation is paid in full.

Financial reports may be requested by LCU at the completion of the project or at the conclusion of the charitable organization's calendar year.

Charitable and non-profit organizations should be aware that applications for funding must be submitted on an annual basis for consideration.

LCU reserves the right, on an ongoing basis, to evaluate or audit the activities of organizations receiving support, and to terminate payment if the terms of a donation are not being satisfactorily met.

***Emergency Relief***

LCU maintains discretion on responding to requests for emergency disaster relief in the Lakeland area. Donations for these purposes will be channeled through a recognized organization such as the Red Cross, which is officially designated to collect and acknowledge receipt of funds.

**Sponsorship Eligibility**

LCU considers sponsorships that align with our brand and business strategies, and that also offers a variety of marketing benefits such as consumer promotions, business-to-business opportunities, on-site brand product exposure, paid and unpaid media coverage, and staff volunteer opportunities.

We support:

- Amateur sport
- Arts and culture
- Community programs

## How to Apply for a Donation

In order to facilitate a request for a donation or program-related investment, a detailed proposal with the following information is needed to determine whether LCU's current focus and funds permit consideration of the request. The proposal should include a completed *Donation Application Cover Sheet* and the following:

- A detailed description of the proposed work and how it will be conducted.
- General information including a brief history, purpose and achievements of the organization.
- A detailed budget and the amount of grant requested for the proposed program.
- Needs of the community being addressed by the proposed project
- Overall campaign amount target (including both public and private sector support)
- Time frame of project implementation
- Charitable registration number as assigned by Canada Customs and Revenue Agency or other basis for provision of tax receipts.
- A list of the Officers and Board of Directors of the organization.
- Present means of support and status of applications to other funding sources (i.e., donations from other donors, government grants, etc.)

Funds for capital projects may be committed but not advanced until ground breaking takes place or confirmation is received that significant funds have been raised for capital acquisition.

Applications are considered throughout the year. Normally, applicants may expect to receive, within six weeks, an indication of whether their proposals are within LCU's program interests and budget limitations.

As funds are limited in relation to the great number of worthwhile proposals received, LCU directs its community investment focus to activities that are within its current interests and that are likely to have wide effect.

Completed proposals are to be forwarded to LCU's Bonnyville Office. Given the large number of requests received throughout the year, only proposals that contain all the required material and supporting documents as listed above will be reviewed. Incomplete requests will be sent back to the organization for re-submission once all information and materials have been gathered.



## Donation Application Cover Sheet

*Please complete the information below and attach it to the application package.*

<b>Charitable Organization Name:</b>	
<b>Contact Name and Title:</b>	
<b>Mailing Address:</b>	
<b>City &amp; Province:</b>	<b>Postal Code:</b>
<b>Charitable Donation Number:</b>	
<b>Phone Number:</b>	<b>E-mail Address:</b>
<b>Total amount of funding your organization has received from LCU to date:</b>	
<b>Amount you are requesting from LCU:</b>	

Please confirm the following items are included in your proposal:

- Written outline of project including your organizations mission, a brief history, purpose and achievements of the organization and list of Board of Directors.
- The needs of community being addressed by the proposed project.
- A detailed budget and the amount of grant requested for the proposed program.
- Overall campaign amount target (both public and private sector).
- Societies Act or charitable registration number as assigned by the CCRA.
- Time frame of project implementation.
- Present means of support and status of applications to other funding sources (ie. donations from other donors, government grants, etc.).

**Please forward your completed proposal to:**  
**Lakeland Credit Union**  
 % Amber Hughes  
**Manager, Marketing and Communications**  
**Box 8057, 5016 50 Ave**  
**Bonnyville AB T9N 2J3**

Once we have received your completed grant proposal, the review period is typically 90 days; we will then notify you of our decision. If you have any questions, please email Amber Hughes at [ahughes@alberta-cu.com](mailto:ahughes@alberta-cu.com).