

OPPORTUNITIES FOR SUPPORT



CROSSstate

Credit Union Foundation

4309 North Front Street, Harrisburg, PA 17110-1618

<https://www.crossstate.org/about/foundations/>

Phone: 717-839-2244

Introduction

Thank you for your interest in supporting the CrossState Credit Union Foundation. The Foundation offers many opportunities for support of the credit union movement. This Opportunities Catalog is intended to provide you with an overview of these opportunities.

Please contact us when you are ready to identify the best opportunity for you or if you have an idea on how to improve and advance the work of the Foundation.

How to Contact the Foundation

CrossState Credit Union Foundation
4309 North Front Street Harrisburg,
PA 17110-1618

Phone: 717-839-2213

Email: mwishnow@crossstate.org

Website: <https://www.crossstate.org/about/foundations/>

Facebook: [facebook.com/CrossStateFoundation](https://www.facebook.com/CrossStateFoundation)

Twitter: [#FinancialRealityFair](https://twitter.com/FinancialRealityFair)



What is the CrossState Credit Union Foundation?

In the spirit of cooperation and unity, the CrossState Credit Union Foundation was formed through the combining of the Pennsylvania and New Jersey Credit Union Foundations. From the start, credit unions have rallied around the *People Helping People* philosophy and the Foundation provides the vehicle to assist Pennsylvania's and New Jersey's credit unions with serving others throughout the states, the country, and the world.

The CrossState Credit Union Foundation is a 501(c)3 charitable organization, and as such, is a non-profit, tax-exempt organization with a main purpose of providing credit unions and those within their communities with the resources needed to succeed.

Some of the ways in which the CrossState Credit Union Foundation works to help credit unions and other organizations include:

- Supporting financial education for consumers of all ages
- Supporting growth and development by helping small credit unions to survive and thrive
- Supporting strategic planning and marketing activities by small credit unions
- Offering educational scholarships and training for credit union staff and volunteers
- Helping community development, low-income designated, credit unions serving the underserved to expand
- Supporting assistance with preparing a CDFI application
- Providing disaster relief grants
- Partnering with other state foundations and the National Credit Union Foundation

What Does the Foundation Do?

The CrossState Credit Union Foundation has five primary areas of funding: Financial Literacy Initiatives; Small Credit Union Assistance; Professional Development; CDFI Preparation Assistance; and Disaster Relief. Working with credit unions, chapters, and community organizations, the Foundation works to achieve its mission of changing people's lives by promoting education, disaster relief, and credit union relevance.



How Does the Foundation Help?

Some examples of the ways in which the Foundation has provided grant assistance include:

- Financial Literacy: Funding to open a student branch in a local high school; to purchase classroom materials; to provide adult financial literacy training for the unbanked and underbanked; and to help teens understand the importance of making sound financial decisions.
- Small Credit Union Assistance: Funding to conduct a marketing campaign to attract new members; to purchase upgraded computer hardware and software; and to assist with a changeover to EMV cards.
- Professional Development grants have been given to credit union staff to attend the CrossState Leadership School; CUNA management training; CUDE training; and to participate in webinars.
- Disaster Relief grants are issued to victims related to credit unions on the local, state, national, and international levels.

Who Is the Foundation?



The work of the Foundation would not be possible without the generous support from credit unions, chapters, vendors, individuals, corporations, and the CrossState Credit Union Association. Requests for funding are reviewed and approved by the Foundation's 18-member board of directors, based on guidelines developed to ensure that each dollar will be used for its greatest impact.

Why Should You Support the CrossState Credit Union Foundation?

Simply put, because we're better together. Individually, we can all have an impact, but when we combine our resources, that impact dramatically expands. Together, we can help others on a scale that wouldn't be possible alone. Please join us in making Pennsylvania's and New Jersey's residents financially fit, and our states a strong, stable economic force in our country.

Your support makes it possible for the Foundation to proudly promote the credit union philosophy of *People Helping People*, and to help consumers to obtain financial independence by supporting financial literacy initiatives, small credit union assistance, professional development of credit union staff and volunteers, and disaster relief support for credit union communities.

How Can You Support the Foundation?

The Foundation raises funds through several annual events and campaigns so we may collectively provide help to our fellow credit unions and others in need. There are many ways in which you can support the work of the Foundation throughout the year. Learn more and find the best fit for you. Thank you for partnering with us so we may continue to help others.

Credit Union Campaign

The Credit Union Campaign is one of the most successful revenue-generating campaigns of the Foundation's year. Mail, e-mail, phone, and in-person requests are made to credit unions, the Association, and its affiliates by board members. The campaign begins in mid-March.

Financial Fitness Day



Americans spend months getting their physical health into shape as part of their New Year's resolutions. Financial Fitness Day is dedicated to helping members get their financial health in shape. Participate in Financial Fitness Day and raise funds for the Foundation in support of financial education initiatives and raise awareness of credit unions' financial education activities and the importance of financial education. To participate, simply hold a Jeans or Casual Day fundraiser for staff at your credit union on Financial Fitness Day (1st Wednesday in April).

Grant Sponsorship

The most direct way to provide support through the Foundation is through grant sponsorship. The Foundation's primary purpose in raising funds is to assist small credit unions, advance financial capability, promote professional development, and provide disaster relief. Your sponsorship of one of the five grant categories will ensure that your donation is used for the type of grant closest to your heart. The five categories are Small Credit Union Assistance, Financial Literacy, CDFI Preparation Assistance, Professional Development, and Disaster Relief.

Spring Exhibition and Raffle

Held during the CrossState Credit Union Association's annual convention in May, this event provides the opportunity for credit unions to donate pieces representing their unique part of their state for display during the conference, as well as online on the Foundation's Facebook page in the weeks leading up to the exhibit. The items are then raffled off on the final day of the conference.



Leaders in Financial Literacy Awards



The Leaders in Financial Literacy Awards recognize and honor credit unions and organizations for excellence in the advancement of financial literacy.

Award winners are honored during the CrossState Credit Union Association’s annual convention. All nominees, sponsors, educators, credit unions, businesses, and interested organizations are invited to attend. Each of the four award winners receive a grant award of \$2,500 in support of their financial literacy efforts. The awards are available to all credit unions and other nonprofit organizations in Pennsylvania and New Jersey for projects initiated, conducted, or ongoing during the previous calendar year.



SPONSORSHIP OPPORTUNITIES

Presenting Sponsor	\$5,000 Contribution
Platinum Sponsor	\$2,500 Contribution
Gold Sponsor	\$1,000 Contribution
Silver Sponsor	\$500 Contribution
Bronze Sponsor	\$250 Contribution
Patron Contributions	up to \$250

Viva Las Vegas Sponsorship & Special Event



The Foundation’s Viva Las Vegas event is held during the CrossState Credit Union Association’s Fall Leadership Conference at Seven Springs in early September. This Monte Carlo-style event is a fun way for the conference attendees to network while raising funds for the Foundation. A gaming rules guidebook, supported by sponsorships from credit union and vendors, is prepared for the event. Following the conference, this booklet is mailed to each credit unions and many vendors in Pennsylvania and New Jersey, increasing exposure for our sponsors. The event raises approximately \$40,000.

Sponsorship packages include admission to the event, vouchers, and recognition in the Guide. All proceeds from sponsorships benefit the CrossState Credit Union Foundation.

SPONSORSHIP OPPORTUNITIES

Gold Sponsor, (Full page, 4 Play Money Packs).....	\$1,100
Silver Sponsor, (Half page (vertical or horizontal), 2 Play Money Packs)	\$650
Bronze Sponsor, (Quarter page (vertical only), 1 Play Money Pack).....	\$350

WalletPalooza: Gift or ReGift

Who hasn't dreamed of finding a wallet stuffed with goodies and secretly wanted to keep it? Well now you can have a chance to do just that and support the Foundation at the same time!

Beginning in October and continuing through November 30th, the Foundation sells tickets for a chance to win one of two wallets stuffed with cash, gift cards, gift certificates, lottery tickets, and more to splurge on yourself or your loved ones, just in time for the holidays. The 2020 wallets' contents each had a value of over \$1,100! You can also help by donating an item for us to include in our two stuffed wallets. Your credit union, chapter or business's name and logo will be prominently displayed with your item's listing, which will be viewed over a period of two months by people across Pennsylvania and New Jersey. WalletPalooza will be linked through the Foundation's website and regularly promoted through social media, targeted email marketing, and CrossState Daily, which has a circulation of over 3,000 readers.

December Cash Calendar

The December Cash Calendar fundraiser was new to the Foundation in 2020. Here's how it works.

1. Buy calendars for a donation of \$15 each
2. Calendars are only available through November 30 or until all 1,000 calendars are sold, whichever comes first
3. For each weekday in December, you'll have a chance to win a cash prize based on your calendar's number matching the PA Evening Pick 4 number, in any order
4. A total of \$3,600 in cash prizes are available and the best part is that if you win, your number is still eligible to win again!

Vendor Campaign



The Vendor Campaign is a request for support from credit union vendors and is made by the Foundation's board members through a mailing directly from the board member's credit union. This campaign also provides information to the vendor on activities they can undertake with the credit union and with the Foundation, such as the Foundation's Financial Reality Fairs and financial education activities.

CU GiveBack - Employee Contribution Program

CU GiveBack allows credit union employees and volunteers to donate a set amount each week, month, quarter, or year to advance credit unions and support financial education. Donations are sent by your credit union to the Foundation. The Foundation's staff will maintain all records on behalf of your credit union. Please consider offering this giving opportunity to your credit union's employees.

Community Investment Fund (CIF) & Charitable Donation Account (CDA)

Through credit unions' impact investing, the Community Investment Fund (CIF) has generated millions of dollars to fund and support local and national financial literacy, development and scholarship initiatives. Started in 1999, the CIF was designed to leverage the interdependence of the credit union system for the greater good. It provides credit unions the opportunity to donate a portion of the dividends earned on certain investments to the Foundation and state credit union foundations, including the CrossState Credit Union Foundation. When you invest in CIF, your credit union, the Foundation, and the National Credit Union Foundation each receive a portion of CIF earnings.

A Charitable Donation Account (CDA) provides expanded investment powers to help fund the charitable giving of credit unions. A minimum of 51% of the total return of a CDA must be distributed within five years to qualified charities, which may include the Foundation. The CDA's total value cannot exceed 5% of the credit union's net worth.

DIY Events

Do-It-Yourself events are a great way for credit unions to encourage staff and members to support the Foundation. Hold a raffle, auction, bake sale, flip flop, or jeans day. Challenge another credit union to a competition to double the fun.

Chapter & Emerging Leader Fundraisers



Chapters and the Emerging Leaders have a fundraising advantage over individual credit unions ... remember, we're better together! In addition to the DIY ideas above, chapters can host sporting tournaments such as golf, cornhole, or bowling, sell raffle tickets at chapter meetings, and so much more. Get creative and have fun while supporting the Foundation.

AmazonSmile

AmazonSmile is a simple and automatic way for you to support the Foundation every time you shop, at no cost to you. When you shop at smile.amazon.com, you'll find the exact same low prices, vast selection, and convenient shopping experience as Amazon.com, with the added bonus that Amazon will donate a portion of the purchase price to your favorite charitable organization. On your first visit to AmazonSmile, please select the CrossState Credit Union Foundation to receive donations from eligible purchases before you begin shopping. Amazon will remember your selection, and then every eligible purchase you make at smile.amazon.com will result in a donation.



Tribute Gifts

The CrossState Credit Union Foundation has established Honor and Memorial Donation Programs to help recognize credit union leaders and others, while supporting the work of the Foundation. Donations are used to help credit unions in need, to provide personal finance education, and to help the credit union movement grow.



Honor Donations may be made to the Foundation in the name of the recipient in recognition of a retirement, birthday, holiday, or simply in appreciation of a job well done. The Foundation will send an attractive greeting card to the person being honored. Sample card styles are available by request and the amount of the donation will not be



disclosed to the recipient.



Memorial donations are another unique and thoughtful way to remember family and friends, while supporting the work of the Foundation.

To recognize your gift, an acknowledgement card identifying you as the donor will be sent to whomever you designate. Samples of the card styles are available and can be personalized upon request. The amount of your gift will not be disclosed to the recipient. For either tribute, if you would like to present the card yourself, simply contact the Foundation.



Please return this form to:
CrossState Credit Union Foundation
4309 North Front Street
Harrisburg, PA 17110-1618
Email: mwishnow@crossstate.org

OPPORTUNITY REQUEST FORM

(Please complete and return as soon as possible to maximize your sponsorship benefits.)

Contact Name: _____

CU/Vendor Name: _____

Street: _____

City: _____ State: _____ Zip: _____

Telephone: _____

Email: _____

_____ **YES!** I am interested in supporting the CrossState Credit Union Foundation through the following:

- | | |
|-------------------------------------|--------------------------------|
| _____ Credit Union Campaign | _____ December Cash Calendar |
| _____ Financial Fitness | _____ CU GiveBack |
| _____ Grant Sponsorship | _____ CIF / CDA |
| _____ Spring Raffle | _____ DIY Event |
| _____ Leaders in Financial Literacy | _____ Chapter/Emerging Leaders |
| _____ Viva Las Vegas | _____ AmazonSmile |
| _____ WalletPalooza | _____ Tribute Gifts |
| _____ Vendor Campaign | _____ Custom Sponsorship |

Detailed information on your selections will be sent for your review.

Questions? 717-839-2213

Thank you!!