

funding guidelines

Shine Bright Community Investment Program Sunova Credit Union | Brio Insurance

At Sunova Credit Union and Brio Insurance, giving back to the community is important to us. We often do this through sponsorships. To us, a sponsorship is a partnership, where we provide funds to support an initiative and in return, we receive marketing value. While often our sponsorships are charity-based, they are not considered a donation or a grant.

We receive hundreds of sponsorship applications each year, many of which don't always align with our goals. So, we've created these guidelines to make our requirements clear to potential sponsorship seekers (that's you!) and to encourage applications that are more likely to receive our support. Please make sure you read through this document in full before starting your application. Any applications that do not meet these guidelines will be declined.

General

- We prefer to sponsor initiatives that support wellness and give special consideration for proposals in one of our key focus areas:
 - Mental and emotional wellness
 - Financial wellness
 - Physical wellness
- We will consider proposals in all categories **except**
 - Religious or sectarian organizations
 - Organizations that discriminate against race, gender, age, religion, or lifestyle
 - Political organizations or candidates
 - Individuals (benefiting one athlete, artist, or student)
 - Third-party or travel fundraising
 - Wedding socials
 - Debt reduction campaigns
 - Capital campaigns
 - Building improvements
- We require sponsorship exclusivity in the category of financial services and insurance.
- We give preference to organizations that are members of Sunova or clients of Brio Insurance.
- We generally need advance notice and lead time to effectively plan and implement our activities.
- Logo and / or name exposure is considered a bonus but is not the primary goal of a sponsorship.

Sunova Credit Union + Brio Insurance brand positioning

Our goal is to partner with organizations and events that are a strong, natural match to at least some aspects of our brand. For example,

- Where relationships matter most / no worries under our wing (tag lines)
- Friendly, neighbourly, relationship driven
- Dog and animal lovers
- Community-minded

- Family-friendly

We are not product pushers. We want the community and members to see us as friendly advisors, people who are eager and willing to help them meet their goals.

Target market

- People who live in and around our branch communities
- Have young families
- Dog lovers
- Supports the local community and events

Recognition requirements

First things first, please avoid sending us a generic application that you are sending to every company if possible. While that may be easier for you, every company you are asking for a sponsorship from has different needs, branding, and target markets, so what you are offering would need to be different to match each company's needs.

Secondly, as mentioned above, logo and / or name exposure is considered a bonus, but it is not the primary goal of our sponsorships. Just like in our day-to-day operations, through our sponsorships we are looking to build relationships with our customers, community, and each other.

Sponsorships must provide at least six of the following:

- A natural connection with our brand positioning above.
- Create a positive impact in a community where we do business.
- Have an opportunity for Sunova or Brio Insurance staff to volunteer / participate in a meaningful way.
- Openness to working with Sunova or Brio Insurance on an ongoing basis.
- Can show appropriate financial and organizational stewardship.
- Opportunity for a visit / meet and greet with our Director of Greetings (D.O.G) — It's a real live St. Bernard!
- Co-run giveaway leading up to the event and tied to some sort of event experience.
- Opportunity to host a pre-event, or exclusive experience for fans.
- Event-related benefits that we can pass along to a large proportion of our customer base. Feel free to use your imagination.
- Access to event content (photos, videos) so we can promote the event and our support.
- A VIP experience to share with every day fans.

Lastly, all applications must present a well-thought-out plan for the program, event, or initiative that includes measurable goals, valuable recognition and marketing opportunities, a realistic allocation of resources, and a clear evaluation plan. You must be committed to fulfilling sponsorship promises and following up with us to report on results.

Funding amount

How much can you ask us for? We get asked this question a lot, and unfortunately, we don't have an exact number to give you.

We support sponsorships at various levels and base our decisions on the overall value of what an applicant is offering.

If you are worried about us declining a sponsorship offer because you're asking for 'too much', you can always offer a few opportunities.

In the end, we don't believe you should base your ask on what you think we'd accept, but rather the value on what you're offering. We can always negotiate if needed.

How to apply

To apply for a sponsorship with Sunova Credit Union or Brio Insurance, please fill out the sponsorship application on the respective company's website.

We review sponsorships on an ongoing basis, but we do request advance notice for sponsorships when possible (more time is appreciated). We will respond to all applicants to advise our decision and the next steps within 10 business days.

Note: All funding and in-kind requests must be made using our online forms. We will not accept or consider emailed or paper applications.