

## Sponsorship and Donation Policy

### **Money at the service of people**

Desjardins and its network of caisses and subsidiaries support a multitude of local, regional and community initiatives promoting cooperative values, economic development, education, health care, the environment, arts and culture, and sports and leisure.

Putting our human and financial strengths to the service of people and their communities is another way for us to combine values with assets – and contribute to the well-being of individuals and communities.

### **Focus areas**

Desjardins grants its sponsorships and donations primarily to organizations that operate in the following areas:

- Economic development
- Cooperation
- Education and youth
- Environment
- Health
- Arts and culture
- Sports and leisure

Above and beyond the money invested, the Desjardins cooperative difference stems from its deep-rooted network of caisses and the daily commitment of its employees and elected officers to society.

### **Statement of commitment**

Sponsorship and donation management is a way for Desjardins to carry out its mission. As such, sponsorships and donations should be used for information and education purposes for the business development and well-being of the communities they serve.

With their support mechanism, sponsorships and donations also promote the regions' economic development by supporting the community's partners and organizations, in addition to the investment and financing granted by Desjardins Group affiliates (hereinafter called the Group).

Sponsorship and donation management activities are carried out in keeping with the values, principles and rules inherent to the Desjardins Group Code of Ethics and Professional Conduct.

### **Levels of intervention**

#### Local level

The sponsorship or donation reaches, or is likely to reach, caisse members, or a limited number of caisses members, and the population in the area of the caisse or of this limited number of caisses. Moreover, the benefits and visibility plan of the sponsorship or donation are usually local.

#### Regional level

The sponsorship or donation reaches, or is likely to reach, caisses members and the regional area population. Moreover, the benefits and visibility plan of the sponsorship or donation are usually regional.

#### Provincial/national level

The sponsorship or donation reaches, or is likely to reach, caisses members and the regional population. Moreover, the benefits and visibility plan of the sponsorship or donation are usually provincial, national or international. A fund was created for major philanthropic files and large nation-wide fundraising or capital-raising campaigns to specifically meet the needs of the three following sectors: cooperation, education and health. When an application is submitted, applicants agree to receive no other financial support from any Group component for the entire duration of the agreement.

#### **Duration of commitments**

The duration of commitments for sponsorships and donations should usually be limited to a five-year period and the period and conditions are determined in a signed agreement.

#### **General eligibility criteria**

Applicants must meet the following criteria:

- Their purpose is based on the well-being of the community or a specific category of individuals, and their activity is the area of cooperation, education, economic development, the environment, , humanitarian assistance, social services or sports;
- The submitted project should correspond to the Group's mission and priorities for action. It must be aimed at one of the caisses' target groups, support operational strategic planning, business priorities and marketing efforts, except for humanitarian causes targeting underprivileged people;
- The source and number of people participating to the activity, event or project and media spin-off justify the involvement of Desjardins Group a region or a caisse;
- The Group's commitment should ensure that Desjardins' position and image are strengthened;
- The Group's security requirements must be respected before a link is established on a Web site.
- They must show their effective financial governance and present a board of directors that is diversified, representative and predominantly made up of independent members.

Note: Donation or sponsorship applications concerning a single individual are not eligible for Desjardins' financial support.

#### **Criteria specific to sponsorships**

Sponsorship applicants must meet the following criteria:

- Offer the Group significant visibility or business reciprocity opportunities;
- Propose a project in keeping with the Group's business development objectives;
- Communicate the message the Group wants to convey to a selected group;
- Provide several opportunities to exploit the proposed sponsorship;
- Allow the cooperative network to carry out direct actions with caisses members and the public;
- Propose an exclusive environment in the financial institutions sector.

#### **Criteria specific to donations**

- Donation applicants must meet the following criteria:
- Be recognized as a charity or non-profit organization and have a charter to that effect;
- Maintain their organization's administrative fees at a reasonable rate which represents less than 20% of their overall expenses;
- Submit a copy of their latest audited annual report with the application;
- Ensure that the majority of their activities are based on volunteer work;
- Show self-financing efforts made and a medium-term existence capacity;

### **Exclusions**

The following donation and sponsorship requests are not eligible for financial support from Desjardins at the provincial/national level:

- Projects involving a single individual.
- Video, DVD and film production.
- Travel and tours.
- Organizations financed by Centraide.
- Events outside Canada.
- Projects linked to a political party or candidate of a political party or interest group.

Please note that these applications will be ignored.

### **Processing of sponsorship and donation application**

All completed applications must be forwarded according to the following responsibilities:

- Applications of local or regional scope should be forwarded to a regional office, group caisses office or the appropriate caisse according to the applicant's head office ([www.desjardins.com/en/votre\\_caisse](http://www.desjardins.com/en/votre_caisse));
- Applications of provincial/national scope must be forwarded to the person in charge at the Fédération des caisses Desjardins du Québec (Public Relations, Sponsorships and Donations Department);
- Applications submitted as circular letters or reply coupons will be disregarded systematically.

Usually, applicants can expect an answer within four weeks. Please allow this amount of time to pass before following up by phone or e-mail.