



Community Outreach Opportunities

Best Practices

Our goal is to equip all Andigoans with the guidelines, tools and supplies needed to make each outreach opportunity consistent, meaningful and effective. We are here to help make each event successful by applying techniques that have proven effective over time and utilizing the processes in place to execute them.

Standards

If you're looking to coordinate an event or want to inquire about sponsorship, please note that there are a few details that you'll need to take into consideration.

Lead time

Events & sponsorships can take time to coordinate. When considering coordinating either of these, please make sure to follow the lead time outlined in the event descriptions listed below. If you're within the listed time frame and still want to submit a request, please first contact the Community Relationship Manager & discuss the opportunity.

Submit a request

If event or sponsorship is within the suggested lead time or approved by the Community Relationship Manager, please submit a request form. You can find this form in KB under the "Most Popular" section titled "Marketing Requests and Ideas".

Evaluate visibility & exposure

All events and sponsorships should align with our Purpose, Mission and Strategic Plan. You can find the Strategic Plan on the HUB under the "Administration Public" page.

Attendance

In order to be considered, certain event types have an attendance requirement and are listed in the event types below.

Evaluate budget

There are specific budget guidelines that Business Development follows when deciding on an event or sponsorship to maintain consistency & maximize impact. Budget requirements are outlined in each event type listed.

Please note that materials should also be included when budgeting. See below for information regarding materials.

Materials

Being prepared with the right materials and quantities is essential. Each event listed has recommended materials types. Quantities will depend on attendance.

Charitable Sponsorships



When you step back a bit and look at the big picture, you'll see that credit unions are driven by the philosophy, "people helping people." Credit unions are places where members pool their savings, lend to one another and own the organization — people helping people. This is how Andigo Credit Union operates. And, we take it even further to support our communities. We look for positive exposure while helping organizations that are in our target markets.

Decisions made by Marketing are based on budget, timing, availability and opportunity.



1. Fill out a "Donation & Sponsorship" request form
2. Submit completed form to marketingrequest@andigo.org

Other Requirements:

Submitted forms must be received a minimum of 30 days prior to event for full consideration.

Event or organization must:

- Be a 501(c)3
- Provide civic or charitable support to a community in an Andigo Credit Union service center market (3-5 miles around a branch).

Andigo is dedicated to our members and our community. Because of limited funding, we do not fund the following:

- ✗ School field trips, tours, club sporting events, booster clubs, ads or sporting activity fundraising
- ✗ Administrative expenses such as conference or travel
- ✗ Projects whose primary purpose is religious, legislative or political
- ✗ Individual fundraising efforts
- ✗ Boy or Girl Scout Troops

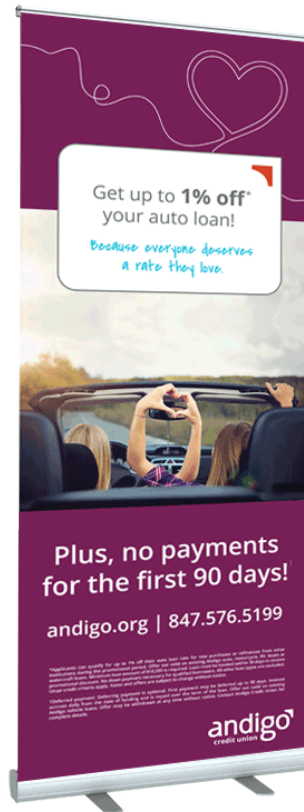
At Community Events

It's important that we use basic consistencies at all of our events. Please reach out to the Community Relationship Manager or Marketing if you're in need of any of these items.

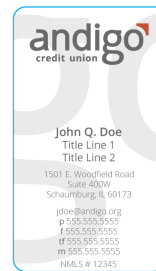


Retractable Banner

Banner may vary depending on which promotions are going on



Business Card



Hello card with chocolate square



Bag with promotional flyers



Table Cloth



Event Types

Sponsored Events

Marketing Request Form required.

An event that requires a financial contribution to be a part of and requires coordination of staffing & supplies.

- **Lead time:** 3-6 months
- **Attendance requirement:** 500+ people
- **Budget:** \$1 per person but varies based on exposure
- **Materials:** Giveaways, literature, scratch-offs, prize wheel & raffle prize are staples for each event

Table Event

Marketing Request Form required.

Opportunities to showcase what Andigo offers in a fun & professional manner. Examples include: chamber events or table events at a business.

- **Coordinate with Community Relationship Manager:** for scheduling and/or support materials
- **Lead time:** 1 month
- **Free:** 250 or fewer
- **Paid:** 300+, \$1 per person or less

Event Types (continued)

Business Visits

Drop information off to make a business introduction in order to increase brand awareness and drive traffic to branches.

- 1-2 weeks lead time
- **Attendance requirement:**
20 or fewer people
- **Budget:** \$5/or less per person
- **Materials:** Bring something as a “leave behind” such as business cards, flyers and a few promotional items

Lunch & Learns

Marketing Request Form required.

Lunch hour presentations to employees of a company provide valuable information on a topic. They are also a great opportunity to showcase Andigo’s suite of products & services. Andigo usually pays for lunch and provides a speaker, handouts, giveaways, a raffle prize & table materials. These events are usually coordinated through a business and they invite/manage attendees.

- **Lead time:** 1-3 months
- **Attendance requirement:**
50 or fewer people
- **Budget:** \$3-5 or less per attendee
- **Materials:** 2 promotional items, folder of literature, raffle
- *Power Point presentation suggested*
- **Coordinate with Community Relationship Manager:** for subject, materials and to coordinate staff for topics and presentations

Event Types (continued)

General Networking

Chamber events to build relationships and increase the brand awareness of Andigo products & services.

- **Lead time:** 1-2 weeks lead time
- **Materials:** postcard with chocolate or flier
- **Attendance requirement:** 30 or fewer people

Health & Benefits Fairs

Marketing Request Form required.

These events are coordinated by and held at sponsor organizations (SOs) to help educate employees about all their benefits. Typically we attend because we're offered as a perk & help contribute to their financial wellbeing.

Requires coordination with Community Relationship Manager for scheduling and support materials.

Special Presentations at Networking Events

As part of many networking groups, you may have the opportunity to speak on behalf of Andigo. This is a chance to spread the Andigo love by highlighting all of the positive ways we can help people save & earn money.

- **Lead time:** 1-2 weeks lead time
- **Attendance requirement:** 30 or fewer people
- **Budget:** \$3-5/or less per attendee
- *Power Point presentation suggested*
- **Materials:** 2 promotional items, a folder of literature & raffle

Lose your bank & let's go®

Giveaways

Raffles

This is one of the primary ways that we acquire leads and it's a valuable tool to leverage at events. Donating raffles (baskets, gift cards & promotional items) are an inexpensive way to increase our presence in community & charity fundraisers.

Depending on the event either a Marketing Request Form or Donation & Sponsor Request Form is required.

- Decisions are made based on timing, availability, opportunity and budget
- **Lead time:** 2-4 weeks
- **Attendance requirement:**
 - less than 100 expected attendees — \$10 gift card and promo items
 - 100-500 people – \$25 gift card & promo items
 - 500+ or special events like After Hours — \$50 gift card & promo items



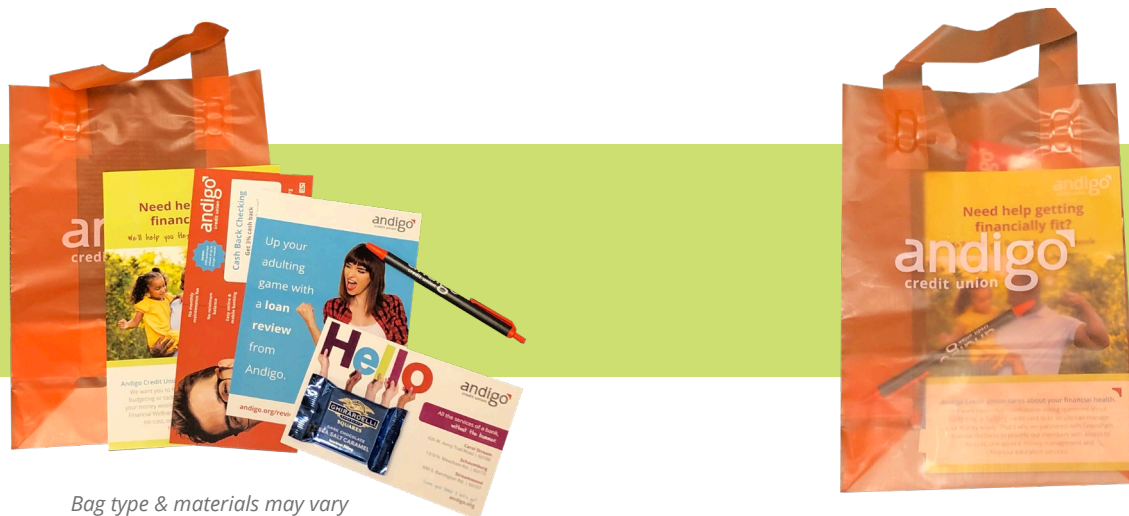
Giveaways (continued)

Event Goodie Bags

Donation & Sponsorship Request Form required

Event goodie bag opportunities allow us to supply a bag, Andigo literature & promo items to all or some of the attendees of an event when they are handed out at registration or the entrance. It's a valuable opportunity to get our flyers and promo items in the hands of the attendees.

- Decisions based on timing, availability, opportunity, and budget
- **Lead time:** 2-4 weeks lead time
- **Budget:** \$1 or more per person but varies based on exposure and opportunity
- **Materials:** provide one to two pieces of literature & 1 -2 items per goody bag depending on special promotions and inventory



Bag type & materials may vary

Leads & Follow-ups

A lead is when we collect information from an attendee at events. The information usually consists of name, phone number & email address with an optional questionnaire on the back.

We collect the information by inviting people to enter to win our raffle using the entry card below.

andigo
credit union

Win a prize.

Name _____

Phone _____

Email _____

I'm an Andigo member!

Lose your bank & let's go®

By filling out this form you are opting into future marketing communication from Andigo Credit Union.

Any raffle cards or leads collected at events should be transposed into a spreadsheet and emailed to MarketingRequest@andigo.org. These leads will be added to all prospect communication about Andigo offers, products and services.

Individual follow-ups:

- If less than 50 leads/raffle cards are collected at an event, the Andigoan(s) who attended the event should reach out directly via phone or email from their personal Andigo email account to each individual (no mass emails). Any product specific leads should be passed along to the appropriate business unit (lending, Wealth Management, etc.) for immediate follow-up.
- If more than 50 leads/raffle cards are collected, a Marketing Request Form can be submitted for Marketing to send a special follow-up email campaign to these individuals.

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It'd be sweet to learn about:

<input type="checkbox"/> Checking	<input type="checkbox"/> Mortgage
<input type="checkbox"/> Money Market	<input type="checkbox"/> Home Equity Loan or Line of Credit
<input type="checkbox"/> Certificates	<input type="checkbox"/> goLoan (personal loan)
<input type="checkbox"/> Auto Loan	<input type="checkbox"/> Wealth Management
<input type="checkbox"/> Credit Cards	<input type="checkbox"/> Other _____
<input type="checkbox"/> Business Services	

andigo.org