

# Community Giving

Greater Arizona



# Guidelines in GAZ

- At Wells Fargo, we believe that grant-making decisions are more effective when made locally
- Wells Fargo giving levels and guidelines
- Grant/Sponsorship procedures
- Decline areas and talking points
- Appendix – TPP & Hands On Banking



# Giving Levels

- Wells Fargo contributed a total of \$103 million to 15,000 nonprofit organizations in 2006, an increase of \$8 million from 2005
- In Arizona, Wells Fargo contributed \$5.5 million in 2006
- In Greater Arizona, Wells Fargo contributed \$800,000 in 2006
- In Greater Arizona, our average donation is \$2,500



# Giving Guidelines

- For information regarding charitable contributions or the Teacher's Partner Program, and for information on marketing sponsorships, please visit:
  - External Website
    - [www.wellsfargo.com/about.crs](http://www.wellsfargo.com/about.crs) (corporate social responsibility)
  - Internal Website
    - Charitable Contributions found on Teamworks A-Z



# Giving Guidelines

- In Greater Arizona – (Mohave, Coconino, Yavapai, Navajo, Apache, La Paz, Gila, Graham, Greenlee, Pima and Cochise Counties), our first priority is to support programs and organizations whose chief purpose is to benefit **low – and moderate – income (LMI) individuals**. The primary areas in which we make our contributions are:
  - **Education**
  - **Community Development Programs**



# Education

- Wells Fargo encourages requests for financial support of educational institutions, as well as for non-profits whose primary focus is to help these institutions. The primary focus of the grants should be to promote academic achievement for low – and moderate – income students.
  - **Teacher's Partner Program**
    - Mini grant program for teachers
  - **Hands on Banking**
    - Financial literacy software



# Community Development

- Wells Fargo is committed to supporting and improving our local communities. We give priority to programs that:
  - Help provide affordable housing for LMI individuals
  - Promote economic development
  - Provide job training programs for LMI individuals
  - Help to revitalize or stabilize LMI communities



# In Addition...

- Wells Fargo also considers support of social and human service organizations whose work primarily benefits LMI individuals, as well as from organizations that help enhance a community's quality of life through arts and culture or civic projects
- The majority of the requests received in GAZ are for support of organizations in this category



# Grant/Sponsorship Procedures

- One request per year
- Average donation is \$2,500
- Request may include either the sponsorship of a fundraising event OR a grant proposal
- Due to changes in our guidelines from the Wells Fargo Foundation, we are limited in the number of charity events we are able to sponsor. Instead, we try to make an impact in our community by providing support for programs that meet our funding guidelines.
- Wells Fargo accepts grant and sponsorship proposals throughout the year, and we review them every other month.



# Typical Declines - GAZ

- Multi-year commitments
- Foundations – often results in double funding
- Individuals
- Endowment Campaigns
- Travel – including student trips
- Small start-up businesses
- Labor activities
- Vehicle
- Capital Campaigns
- Purchase of advertising
- Start-up funding for new organizations
- Political campaigns or activities
- Organizations designed primarily for lobbying
- Video or film production
- Promotional items
- For-profit entities



# Community Giving - Appendix

## GAZ Supporting Documents



# Teacher's Partner Program

- Wells Fargo invites **ARIZONA** teachers in public, private, and charter schools, kindergarten through 12<sup>th</sup> grade, to participate in the Wells Fargo Teacher's Partner program. This program was created to act as a catalyst for educational opportunities that will lead to academic enrichment and to encourage positive change in the education environment.
- Application Forms can be found in the Corporate Social Responsibility section of the Well's Fargo's internal website or at [www.wellsfargo.com/about/about.jhtml](http://www.wellsfargo.com/about/about.jhtml)



# Hands on Banking

- In an effort to provide critically needed financial education to students and adults nationwide, Wells Fargo & Company has launched its newly expanded on-line financial literacy program, *Hands on Banking*. Available free-of-charge on the Internet ([www.handsonbanking.org](http://www.handsonbanking.org) and [www.elfuturoentusmanos.org](http://www.elfuturoentusmanos.org)), CD-ROM, and in printed curriculum,
- *Hands on Banking* and its Spanish language version, *el futuro en tus manos*, teach the basics of money management geared to four age groups, from grade schoolers to adults.



# QUESTIONS?



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