



Desert Financial Community Partnership Guidelines & FAQs

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Consideration Requirements for Nonprofit Partners

As a part of our commitment to sharing success, Desert Financial is proud to support nonprofits to strengthen Arizona communities and empower financial education. We focus on building long-term relationships with our nonprofit partners to make a significant impact in Arizona on our priority social issues of focus.

As such, consideration is given to nonprofits that meet the following criteria:

- Be tax-exempt under section 501(c)(3) of the Internal Revenue Code, not classified as a private foundation, and not operating through a fiscal agent or sponsor.
- Have been in operation for at least three years.
- Have a volunteer board overseeing the nonprofit's operations.
- Serve 100+ individuals and address large-scale social issues in Arizona.
- Able to provide regular opportunities for Desert Financial team members to volunteer in support of the nonprofit.
- Currently participating or interested in providing financial education or programming with Desert Financial for staff and/or clients.

Priority Social Issues of Focus:

Desert Financial invests in programs and initiatives that align with our mission of improving lives and strengthening Arizona communities. Our support focuses on nonprofits working on the following social issue priorities:

Financial Education: We support efforts that increase financial well-being by providing individuals with the knowledge, tools, and resources they need to financially thrive. Areas of focus may include:

- Workforce development and job readiness programs
- Budgeting, savings, and financial planning education
- Credit and debt awareness initiatives
- One-on-one financial coaching and skills-building workshops

Access to Housing & Homeownership: We are committed to addressing housing challenges and increasing opportunities for homeownership. Examples of support may include:

- Expanding affordable housing supply in Arizona.
- Partnering with nonprofits that provide diversion and homelessness prevention services.
- Down payment assistance programs, financial education, or other programs to support first-time homebuyers or those preparing for home ownership.

Education: We recognize the importance of education in building strong communities and support initiatives that foster academic growth and empower educators and students. Our areas of focus include:

- Programs that promote increased academic success for students, such as mentorship, after-school support, and wrap-around services focused on reducing barriers and increasing access to education.
- Support for post-secondary education pathways and workforce development/readiness.

Funding Exclusions - we are unable to support the following types of requests:

- Political candidates, parties, campaigns or causes.
- Program support related to the overall operation and management of a nonprofit entity
- Clubs, groups, and smaller organizations within a school (e.g. booster clubs, athletic departments/club teams, or academic groups.)
- Individuals, including for example, those raising money for a nonprofit organization through pledges for activities such as racing, running, or biking, as well as fundraising for charitable organizations or fundraisers that support a single individual.
- Social, labor union, or trade associations, fraternal or political organizations, or organizations serving a limited constituency.
- Faith-based organizations or religious programs whose principal purpose is to promulgate a particular religious faith, creed, or doctrine.
- Pageants and the individual contestants for any part of the event or process.
- Bachelor/Bachelorette Auction events.
- Individuals seeking assistance for personal travel to conferences, training or learning programs, reunions, anniversaries, mission trips, races, contests, competitions.
- Team travel to competitions, tournaments, playoffs, etc.
- Federal or Corporate United Way campaigns.
- Online auctions.

- Organizations that discriminate based on race, color, religion, age, sex, sexual orientation, gender identity, marital status, national origin, disability, veteran status, or other legally protected status.
- Pass-through funding (funding of foundations, fundraisers on behalf of other organizations, etc.)

Please note that funding for one year does not automatically guarantee funding for the following year.

Types of Support Provided for Nonprofit Partners

Desert Financial provides support to our nonprofit partners in the following ways:

- **Nonprofit Sponsorships** — Funds to support charitable events.
- **Volunteering** — Hands-on support from our employees through one-time or ongoing volunteer activities.
- **Financial Education** — We offer a range of tools and resources designed to help increase financial education for your staff, clients, and community.
- **Program Support** — Funding provided to help implement impactful programs. The primary way we offer this support is through our Grants Program, which is invitation-only.
 - Grant funding is provided to programs that align with the primary social issue of focus for that cycle. Nonprofits that participate in financial education and/or volunteer programming with Desert Financial are invited to apply.

Consideration Requirements for Other Partners

Desert Financial is proud to support Arizona educators and for-profit businesses by providing financial education workshops and resources as our capacity allows. Although we are unable to consider other types of requests at this time, we invite you to complete the Community Partner Interest Form to explore financial education opportunities. In addition, we encourage you to review our free, monthly financial webinars and other resources on our website at www.desertfinancial.com/well-being. We look forward to partnering together to support Arizona communities.

Desert Financial Community Partner Interest Form

If you are interested in partnering with Desert Financial in one or more of the ways listed above (nonprofit charitable event sponsorships, volunteering, financial education, and/or programmatic support), you must fill out a [Community Partner Interest Form](#).

Please note that this form must be submitted with all required information and does not save responses to be completed later.

Submissions are reviewed **every two months**. Due to the high volume of requests received, Desert Financial prioritizes opportunities that align most closely with addressing our priority social issues, taking into account funding availability and bandwidth to fulfill deliverables.

The first question of the form will ask you to identify yourself with one of the following statements:

- An educator seeking classroom support.
- A for-profit business seeking support for clients or employees.
- A nonprofit organization seeking support & partnership.

If you are an educator seeking classroom support or a for-profit business, please note that the only request you are able to submit using this form is a request for financial education resources.

If you are a nonprofit seeking support & partnership, you must provide:

- An acknowledgement of meeting the requirements listed in the section above.
- Nonprofit details: Legal name, mailing address, and Executive Director information.
- Proof of 501(c)(3) status: A current W-9 including EIN.
- Mission of the organization.
- Community needs that will be addressed.
- Demonstration of existing partnership, by selecting a nonprofit from the dropdown list.

If a current nonprofit partnership with Desert Financial does not exist, you will be invited to complete the [Community Partner Interest Form](#) to explore financial education opportunities only. After submitting the form, our Support Interest Review Committee will review the information provided and may reach out to schedule a call to better understand alignment for potential partnership opportunities.

If a current nonprofit partnership with Desert Financial already exists, the [Community Partner Interest Form](#) will allow the nonprofit to proceed with a specific request for event sponsorship, programmatic support, volunteer support, or financial education support.

Event Sponsorship Request

Sponsorship requests must be submitted at least **90 days prior** to your event.

In the form, the nonprofit must provide:

- Sponsorship level information.
- Specific amount requested (first-time requests may not exceed \$10,000).
- Important deliverable deadlines and details (e.g., marketing ads specs, RSVPs, logo, etc.).

Available funding to fulfill requests is budgeted on a quarterly basis. Once all funds for that quarter are allocated, no further requests will be considered. While we require requests to be submitted at least 90 days prior to your event, we recommend submitting them as early as possible.

Reporting: Upon receiving event sponsorship and/or program funding from Desert Financial, it is required that the nonprofit completes the **Recap Report** within 30 days post-event.

Volunteering Request

Volunteer requests must be submitted at least **90 days prior** to your event.

In the form, nonprofit must provide:

- Point of contact for volunteering.
- Description of volunteering opportunity or support requested.
- Date of volunteer event.
- Number of volunteers requested.

If you have questions regarding the types of volunteerism that Desert Financial provides, please email volunteering@desertfinancial.com.

Financial Education Support Request

This form is to request a live presentation on financial education content or education resources. Financial education requests must be submitted at least **90 days prior** to your program.

In the form, you must provide:

- Point-of-contact for financial education.
- Demographics of who will be in attendance (e.g., age, race, gender).
- Financial education topics of interest.
- Proposed date, location, and method of education (e.g., virtual or in-person).
- A commitment to ensure that at least 10–20 people will be in attendance for live presentations.

Please visit the [Desert Financial](https://www.desertfinancial.com) website for information on our free, monthly webinars open to the community and other financial education resources. If you have specific questions, please email financialeducation@desertfinancial.com.

Programmatic Support Request

Programmatic requests must be submitted at least **90 days prior** to your program start date.

In the form, the nonprofit must provide:

- Specific amount requested (first-time requests may not exceed \$10,000).
- Program start date.
- Program impact details.

Available funding to fulfill requests is budgeted on a quarterly basis. Once all funds for that quarter are allocated, no further requests will be considered. While we require requests to be submitted at least 90 days prior to your event, we recommend submitting them 180 days in advance.

Reporting: Upon receiving event sponsorship and/or program funding from Desert Financial, it is required that the nonprofit completes the Recap Report within 30 days post-event.

Frequently Asked Questions

How do I partner with or request support from Desert Financial?

If you are interested in partnering with Desert Financial and fit the criteria outlined above, please fill out the [Community Partner Interest Form](#). We will review your request to ensure a fit within our existing nonprofit partnership model. We typically start all our nonprofit partnerships by offering volunteer opportunities for our team members and/or financial education.

How can I request volunteer support for an event?

If you are interested in hosting Desert Financial volunteers and fit the criteria mentioned above, please fill out the [Community Partner Interest Form](#). We will review your organization and request to ensure a fit within our existing nonprofit partnership model. If you have questions regarding the types of volunteerism that Desert Financial provides, please email volunteering@desertfinancial.com.

How can I get information about financial education?

Please visit the [Desert Financial](#) website for information on our free, monthly webinars open to the community and other financial education resources. If you are interested in an in-person presentation for a specific audience or receiving financial education resources for students or the community, please fill out the [Community Partner Interest Form](#), and we will review your request and determine staff availability. If you have specific questions, please email financialeducation@desertfinancial.com.

How can I get in-kind or silent/live auction donations for events?

We do not provide in-kind donations for events or organizations at this time.

How can I apply for programmatic support through your Grants program?

Grant applications are by invitation only and are only available to nonprofit organizations that participate in financial education and/or volunteer programming with Desert Financial.