

Proactive Strategic Credit Union Messaging Proposal- 2023/2024

Total Request - \$800,000

Examples of potential state-specific and regional investments below.

ARIZONA

The Arizona Capitol Times – Pro-credit union advertising

Overview: The Arizona Capitol Times is the first place that political leaders in Arizona turn for information. The Arizona Capitol Times's audience is made up of elected officials, heads of state agencies, lobbyists, executives, thought leaders in various across the political landscape. 75% of their readers identify as decision-makers in their organization. Advertising possibilities include Digital Display Ads, Print Advertising, Social Media Advertising, Email Campaigns, Sponsored Content, Paid Search, Webinars & Event Sponsorships

Sponsorship of key conferences, summits, and/or initiatives

Overview: Arizona credit unions will look to support key business summits and events, as well as potential education initiatives, dependent on opportunities with legislative leadership.

Contribution to Arizona Financial Literacy Fund

Overview: The Arizona state treasurer's financial literacy fund consists of monies appropriated by the legislature and any other monies available from any lawful public or private source to promote financial literacy in this state. Over the last year, the state treasurer has looked for ways to raise money for the fund and partner with local credit unions.

COLORADO

Credit union-branded leave behind items for state lawmakers

Overview: Colorado lawmakers are accustomed to receiving branded swag from organizations that engage with and meet with their elected representatives. GoWest would identify unique and key items to brand and provide to lawmakers.

Participation in the Colorado Competitive Council

Overview: Colorado industry leaders a uniquely structured organization for investors to guide and advise on broader policy efforts under the banner of C3, which has an active and effective lobbying presence as well as engagement opportunities with lawmakers in their home districts. Participants are fairly limited and provide an effective opportunity for Colorado credit unions to influence policies of broader impact to the credit union with other affected entities. Historically Colorado bankers have also successfully utilized other

organizations to generate opposition to credit union policy proposals and engagement in C3 will head off those attempts in an influential group.

Digital ad campaign for credit union awareness

Overview: Educational campaign targeted at legislators and their constituents regarding bills that are being run at the legislature. Particularly if bank assets/public funds are being proposed, creating an educational ad that could be targeted around a geo-fenced area of the Capitol, and targeted in key legislative seats. Would encourage constituents to contact legislators and connect people to an informational website. The intended goal would be both to raise awareness and education amongst legislators and their staff and to sway votes on bills.

IDAHO

Sponsorship of Governor's Cup

Overview: Every year, the Idaho Governor hosts a fundraiser to raise scholarship money for Idaho high school seniors to attend Idaho universities. This continues to be a great opportunity to host key lawmakers in leadership and credit union champions for the two-day event and an opportune time to continue to share the important work Idaho credit unions are doing around Idaho. In 2022 GoWest sponsored the vice-chairman of the House Business committee (Germaine Committee in the House of Reps.) and in 2023 GoWest is sponsoring the Senate Pro Tempore. With the Idaho Credit Union Act modernization legislation, we are bringing forward in the 2024 legislative session, this is the perfect opportunity to get one-on-one time with Senate leadership to discuss our initiatives.

Eye on Boise sponsorship

Overview: Continue pro-credit union awareness and messaging on "Eye on Boise" publication that is the main source of political information and news consumed by elected officials, lobbyists, staff, agency officials, and the public. Including timely impact data into messaging underscores the significant role and impact of Idaho Credit Unions. In 2024, we will continue to look for other well visited publications where we can share Idaho credit union impact data, too.

Leave behind items for Idaho lawmakers

Overview: Dropping a welcome package off in January at the start of each legislative session is a great way to welcome the legislators back and provides an opportunity to be seen and to discuss important upcoming legislation with them.

OREGON

Thank you ad campaign

Overview: During the 2023 Oregon legislative session several key lawmakers stepped up to support key credit union legislation. Thanking them strategically and publicly will allow us to show additional and valued appreciation to those lawmakers, increase awareness of the initiatives, especially the financial literacy advancement relevant to the public at-large, and highlight for other lawmakers that Oregon credit unions will help shine a spotlight on those who

step up in the future. Spending would include ad design work, as well as social media and local media purchases.

Credit union-branded leave behind items for state lawmakers

Overview: Oregon lawmakers are accustomed to receiving branded swag from organizations that engage with and meet with their elected representatives. GoWest would identify unique and key items to brand and provide to lawmakers at the beginning of the short session in 2024.

WASHINGTON

TVW Sponsorship

Overview: Credit unions have had exclusive sponsorship via our negotiations and evolution of the most valuable placement on TVW's (Washington's version of C-SPAN) web site throughout the pandemic. With next year being a statewide election year, we also have the opportunity to solely sponsor TVW's voter guide as we were the first to do so. This is incredibly valuable as all lawmakers, lobbyists, state agencies, and the public must go through the TVW schedule page where our sponsorship resides in order to access all committee meetings, floor debate, and other legislative content.

Sponsorship of Washington Budget and Policy Center Conference

Overview: The organization is highly regarded by current legislative leadership in both chambers for their convening and fiscal research. Supporting the event would be not only noticed by key and influential lawmakers but appreciated.

Sponsorship and speaker placement at housing event

Overview: Identify one or more housing-related events/conferences in Washington state in 2024 and contribute and specifically leverage to get one or more credit union representatives engaged as speakers or panelists as part of the overall content.

Online awareness ads geo-targeted at state capitol

Overview: Develop session-specific online advertising geo-fenced at the Washington state Capitol during session aimed at legislators for awareness on overall impact. WA has strict grassroots lobbying versus awareness campaign requirements for advertising so significant oversight would be done in advance to ensure compliance and effectiveness.

Accounting/legal analysis in support of Digital Automated Services tax issue

Overview: Negotiations with the state Department of Revenue are ongoing related to the issue of the application of sales tax on certain digital automated services purchased by credit unions and other financial institutions. Following the completion of those formal negotiations it may be necessary to conduct additional analysis of existing issues via an outside accounting and/or law firms with specific experience on this particular topic in order to support a legislative ask.

WYOMING

Key Event Support

Overview: Each year during the legislative session, the Governor hosts a Prayer Breakfast. Legislators, lobbyists, and Wyoming's business community attend the annual event with approximately 300+ attendees. [Wyoming Governor's Prayer Breakfast](#), opportunity exists to support additional major key events to provide more engagement and recognition of Wyoming's credit unions, i.e. Wyoming Congressional Award golf tournament, First Lady Gordon's Hunger initiative, etc.

Wyoming local government/association convention sponsorship

Overview: Identify and capitalize on sponsorship opportunities with local government, agricultural and trade associations annual meetings and conferences. Targeted towards those who are prime collaborators on public funds initiatives, i.e. Wyoming Association of Special Districts, Wyoming Weed & Pest Districts, Wyoming Stock Growers, Wyoming Tax Payers Association, Wyoming Business Alliance, etc.

Digital communications

Overview: Opportunities exist to reach elected officials, local governments, etc., through enhanced and targeted digital communications highlighting credit union economic and social contributions to Wyoming. Opportunities include targeted digital advertising on social media platforms, online news publication, Cowboy State Daily, banners, etc.

Legislator Welcome Box

Overview: Information kit with credit union specific items and background materials and packet to help onboard new legislators, and remind returning legislators, as they prepare for the 2024 legislative session.

MULTI-STATE

Awareness campaign and consumer interest

Overview: In light of recent bank failures and threat of consumer/business flight to the biggest banks, we will execute an education campaign targeted to consumers in Arizona, Colorado, Idaho, Oregon, Washington, and Wyoming on the credit union difference and inspire them to choose credit unions as their trusted financial partner. We will create a meaningful and disruptive campaign to call attention to 1) Why credit unions are safe and sound, combating common misconceptions; 2) The value of credit unions, showcasing that there is a credit union for everyone; and 3) The CU member-driven approach, bringing to life positive community impacts.

Credit union welcome kit for lawmakers

Overview: Develop state-specific welcome kits for each state to distribute at the beginning of the 2024 legislative session. Each State Legislature includes a

majority of new members over the last few sessions. It remains important to have a variety of strategies to get in front of legislators prior to and during a legislative session. One additional way to provide credit union impact and awareness messaging via a kit, which could be a branded box or tote bag filled with impact reports, information about credit unions, a branded item like a coffee mug or candy, as well as the state lobbyists business card. Each state has individual gift rules and limitations that would be reviewed and complied with.