



## CREDIT UNION BOARD POLICY

**SECTION: OPERATIONAL ISSUES**

**Policy No: 5:03:04**

**Date: 3/31/08**

**SUBJECT: Request for Access**

**Replaces: 6/15/06**

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### Columbia Credit Union Credit Union Access Policy and Procedures

**Credit Union Access Policy.** The Credit Union Board believes members should have reasonable access to interact with fellow members for the purpose of communicating about non-transaction, Credit Union related issues, including campaigning for Credit Union elected positions or gathering petition signatures, so long as there is no threat to the safety and security of the Credit Union, Credit Union staff, and members. As used in this Policy and Procedures, "Credit Union Management" means the CEO or any Senior Vice President designated by the CEO to carry out this Policy and Procedures.

**Credit Union Access Procedures.** The following Procedures outline the requirements and standards for a Credit Union member to request approval for access to a Credit Union branch common area to interact with fellow members for Credit Union related purposes (e.g., gathering petition signatures, campaigning for Credit Union positions, etc.) and Credit Union management's responsibilities for ensuring the safety and security of the Credit Union, staff, and members.

Each member desiring access to a branch pursuant to this Policy and Procedures must complete and submit a separate Request for Access form (Exhibit A). The Credit Union will make the Request for Access form available online to members and staff. Completed Request for Access forms must be submitted:

1. In person to the branch manager of the branch where access is requested; or
2. In person to the Credit Union's SVP Branch Operations at 703 Broadway, Suite 500, Vancouver, WA; or
3. By mailing them to Columbia Credit Union, Attn: SVP Branch Operations, PO Box 324, Vancouver WA 98666; or
4. By faxing them to (360) 619-3201.

Credit Union management will consider submitted Requests for Access for approval and will notify each member who has submitted a form no later than two (2) business days after receipt of his or her completed form.

In order to protect the safety and security of Credit Union property and Credit Union members and staff, the member's Request for Access and access privilege is subject to the following conditions:



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- a. The member is a member of the Credit Union and agrees to abide by the terms and conditions of this Credit Union Access Policy and Procedures.
  - b. The Request for Access is valid only for the approved member, approved purpose, the branch and times designated during the normal business hours of the branch or during the hours as designated by Credit Union management. A member may seek access to campaign for election to a Credit Union position only for himself or herself. A member may not seek access to conduct such campaigning for another member.
  - c. Access is limited to those portions of the branch common area as designated by Credit Union management. Credit Union management may adjust the designated area at his or her discretion to assure safety and security of the Credit Union, staff, and members.
  - d. Any contact or communication with other Credit Union members or customers shall be limited to matters related to the Credit Union as are specifically identified in the Request for Access.
  - e. Because of size limitations at the branch, the number of members approved for access at any one time shall be limited and, in most cases, will not exceed two (2) people. In the event there are multiple requests for access to any one branch, Credit Union management retains the discretion to schedule access to provide all members reasonable access.
  - f. All activity conducted pursuant to the Request for Access shall follow reasonable standards of public decorum. Inquiries or requests made to members that compromise the privacy of the members and their transactions or comments that could be considered defamatory will not be tolerated. Any materials distributed by a member on Credit Union premises must be reasonably related to the purpose for the requested access and not contain any obscene, defamatory or false information. In addition, the member may not represent himself or herself as an employee of the Credit Union.
  - g. The Request for Access is subject to immediate termination upon the member taking any action which is disruptive or which is likely to be disruptive to the normal operations of the branch or does not comply with this Policy and Procedures. In the event of any disruptive or impermissible conduct by the member, Credit Union management may request the member to modify his or her conduct in compliance with this Policy and Procedures or ask the member to leave the premises.
  - h. Member agrees to pay for any and all damages caused or costs incurred by the Credit Union as a result of member's request for access and conduct, including but not limited to costs of cleanup, damage to property and necessary security costs or attorneys fees to protect the Credit Union. In the event law enforcement is requested to protect the Credit Union or its rights under this



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Policy, to the extent reasonably possible, the member shall be informed of the need for or request for any law enforcement assistance.

- i. Member understands that the Credit Union cannot and does not provide security to member for the requested access beyond the security the Credit Union provides to other members conducting Credit Union transaction business. Therefore, member agrees to indemnify and hold the Credit Union harmless from any claims, losses or damages that member may sustain during the requested access that is not a direct result of actions or inactions of the Credit Union to provide for the general safety and security of all members.
- j. The Credit Union reserves the right to impose additional restrictions on access granted under the Request for Access at any time.



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### EXHIBIT A

#### Columbia Credit Union Request for Access

Member Name: Date/Time Requested:

Member Address: Credit Union Branch:

\_\_\_\_\_ Specific Access Area:

Daytime Phone:

Purpose of Access:

By signing below, I request access to the Credit Union area, as specified above, agree to fully comply with the terms of the Credit Union's Access Policy and Procedures, and agree to cooperate with Credit Union management regarding my access privilege.

Member Signature \_\_\_\_\_ Date