



Credit.org Partner Marketing & Information Use Best Practices

Guidance for marketing, communications, co-branding, and information sharing

1. Purpose and scope

This document sets clear expectations for partners on how to:

- Reference Credit.org in external communications (if approved).
- Use (or not use) Credit.org brand assets (name, logos, trademarks, program names).
- Create and distribute co-branded materials and joint communications.
- Share and use information, including client/lead data and other confidential information.

If your activity is public-facing or consumer-facing, assume approval is required **before** publishing or distributing anything that references Credit.org.

2. Definitions

- **Brand Assets:** Credit.org's name, logos, trademarks, taglines, program names, and any visual identity elements.
- **Materials:** Any content or communication used internally or externally (webpages, social posts, ads, email, SMS/texts, scripts, flyers, decks, press releases, event pages, recordings, etc.).
- **Public-facing:** Anything visible to the public or a consumer audience (including paid ads and communications that reach consumers).
- **Co-branded / Joint:** Any Material that references both parties, uses both brands, or could reasonably imply a collaboration.
- **Information:** Any non-public information shared between the parties, including client/lead data, attendee data, performance metrics, operational details, and drafts.

3. Quick rules

- **No written approval = no use of Credit.org Brand Assets.**
- Approval must cover the final version of each asset and each placement/channel.
- Partner-owned communications remain the Partner's responsibility (delivery, consent management, compliance).
- Events hosted by the Partner: the Partner owns registration, consent collection, and attendee communications unless agreed otherwise in writing.
- Use shared Information only for the specific, approved purpose and do not share it beyond authorized staff/vendors.

4. Brand use and representation

Partners may not use Credit.org Brand Assets in any public-facing way unless Credit.org provides written approval of the final Materials.

4.1 What requires written approval

- Websites, landing pages, or partner directories
- Social posts, stories/reels, account tagging, and paid ads
- Email marketing, newsletters, and customer onboarding messages
- SMS/text messaging (including opt-in disclosure language, keywords/short code references, and message copy) that references Credit.org or the partnership/program
- Flyers, brochures, one-pagers, decks, signage, or any printable collateral
- Press releases, media outreach, interviews, podcasts, and quotes
- Event/webinar pages, registration pages, and promotional materials
- Scripts (call center, webinar scripts, FAQs, chat scripts) that reference Credit.org
- Case studies, testimonials, impact statements, or performance claims involving Credit.org

4.2 Not allowed without explicit written approval

- Using the Credit.org logo anywhere (including small footer logos, thumbnails, or “trusted by” sections).
- Implying endorsement, certification, sponsorship, exclusivity, or agency (for example: “Credit.org approved,” “official partner,” “certified by,” or similar).
- Speaking on behalf of Credit.org or representing Partner staff as Credit.org staff.
- Editing, recoloring, stretching, animating, recreating, or combining Credit.org marks into new logo lockups.
- Using Credit.org’s name in paid advertising keyword targeting or ad copy.

4.3 Allowed internal use (non-public)

- Internal training, operational workflows, and staff enablement materials.
- Internal references such as “Credit.org (partner)” in non-marketing documents.

5. Service descriptions and positioning

If Credit.org approves external references, the Partner must use only the approved description provided by Credit.org for how Credit.org is referenced and what role Credit.org plays.

Partners may not create their own descriptions that could confuse consumers about roles, responsibilities, or who is providing services.

6. Co-branded and joint communications

Any Materials that reference both parties are subject to the approval process in Section 8 before distribution.

6.1 Ownership and responsibility

- Communications initiated and distributed by the Partner remain the Partner’s responsibility unless expressly agreed otherwise in writing.

- Approval of co-branded or joint Materials does not transfer ownership, control, or operational responsibility for delivery, consent management, or compliance with applicable laws.

6.2 Events, webinars, workshops, and educational programs

- If the Partner hosts the event: the Partner is responsible for registration, consent collection, and all attendee communications unless otherwise agreed in writing.
- This includes marketing materials, emails, SMS/texts, outbound dialing, websites, social posts, press releases, educational content, client-facing scripts, and event promotions.

7. Information sharing and permitted use

Information shared between the parties must be used only for the specific purpose it was shared for and only by authorized personnel and approved vendors.

7.1 Confidential information

- Treat non-public information (including drafts, pricing, operational details, and performance metrics) as confidential.
- Do not publish, share externally, or quote confidential information without written approval from the information owner.
- Return or securely delete confidential information upon request or when it is no longer needed for the partnership purpose, consistent with agreed retention requirements.

7.2 Content, recordings, photos, and testimonials

- Do not post photos, recordings, screenshots, testimonials, or quotes involving Credit.org without written approval of the final asset and its intended placement.
- If individuals are identifiable, confirm appropriate releases/consents were obtained by the responsible party before use.
- Use only the approved version of any Credit.org-provided content; do not edit or repurpose without approval.

7.3 Quick reference: what you can share

The table below summarizes common scenarios for sharing information and when approval is required.

Scenario	Allowed?
Internal staff training materials that reference Credit.org (not consumer-facing)	Allowed (internal only)
Posting “in partnership with Credit.org” on a website or social media	Written approval required
Including Credit.org logo on an event flyer or registration page	Written approval required
Sharing partnership performance metrics externally (press, case studies, marketing claims)	Written approval required

7.4 Use of Credit.org Educational Materials (Booklets & Tip Sheets)

Credit.org provides a variety of educational booklets, tip sheets, and written resources designed to support consumer financial education. Many of these materials are publicly accessible on the Credit.org website for ease of distribution; however, public availability does not mean the materials are in the public domain.

All Credit.org educational materials are protected by copyright and remain the intellectual property of Springboard Nonprofit Consumer Credit Management, Inc. dba Credit.org.

Permitted Educational Use:

Partners may distribute Credit.org booklets and tip sheets to their participants solely for educational purposes, provided that all conditions below are met.

Use Requirements & Restrictions:

- ❖ **No Modifications Allowed:** Credit.org materials may not be changed, edited, shortened, reformatted, adapted, translated, or otherwise altered in any way.
- ❖ **Copyright & Branding Must Remain Intact:** All copyright notices, author credits, logos, branding, disclaimers, and footer information must remain visible and unaltered.
- ❖ **Proper Attribution Required:** Credit.org must be clearly identified as the original source of the material.
- ❖ **No Rebranding or Ownership Claims:** Materials may not be presented as Partner-created content, co-branded materials, or rebranded under the Partner's name or identity.
- ❖ **Intended Use Only:** Materials may only be used for their intended educational purpose and may not be sold, licensed, or monetized.

Permissions for Adaptation or Custom Use:

If a Partner wishes to adapt, edit, translate, co-brand, or incorporate materials into custom curricula or platforms, prior written permission from Credit.org is required before distribution.

8. Required approval process for public-facing Materials

Before any public-facing Material referencing Credit.org is published or distributed, the Partner must obtain written approval from Credit.org and, when applicable, from the Partner's approver as well.

8.1 What to submit

- Final draft of each asset (not a concept): copy, creative, scripts, and screenshots or files.
- Where it will appear: channels, URLs, audience, and placements.
- Run dates/timing (including paid media dates).
- Any claims, metrics, or testimonials (include the source).

8.2 Approval rules

- Written approval is required before launch.
- No changes after approval without re-approval (including "minor" edits).
- Either party may decline approval.

8.3 Where to send approval requests

Send approval requests to:

Credit.org contact name/title: _____

Email: _____

9. Corrections, takedowns, and non-compliance

If a Partner publishes or distributes Materials that reference Credit.org without approval, or uses shared Information outside the permitted purpose, Credit.org may require corrective action.

- Immediate pause or takedown of the Materials.
- Correction of inaccurate statements, roles, or claims.
- Removal of Credit.org Brand Assets from any channel or asset.
- Confirmation of deletion/return of Information if it was misused or improperly shared.

Acknowledgment

Partner Acknowledgment of Partnership Best Practices

Partner Organization Name: _____

Primary Contact Name & Title: _____

Email Address: _____

Effective Date: _____

Acknowledgment

The undersigned acknowledges receipt of Credit.org's Partnership Best Practices: Building Strong, Compliant, and Client-Centered Collaborations document (the "Best Practices").

By signing below, the Partner confirms that it has reviewed and understands the Best Practices and agrees to adhere to the principles and requirements outlined therein when participating in any partnership, collaboration, event, program, or initiative involving Credit.org.

In particular, the Partner acknowledges and agrees that:

- Each organization retains responsibility for its own operations, systems, and communications unless expressly agreed otherwise in writing.
- Communications initiated and distributed by the Partner, including marketing, emails, SMS/text messages, outbound calls, event promotions, or registration outreach, remain the responsibility of the Partner.
- Approval of co-branded or joint communications does not transfer ownership, control, or responsibility for delivery, consent management, or compliance with applicable laws.
- For events, workshops, webinars, or educational programs hosted by the Partner, the Partner is responsible for attendee registration, consent collection, and all related communications unless otherwise agreed in writing.
- All joint or co-branded communications referencing both parties are subject to the required approval process described in Best Practices.

This acknowledgment is intended to confirm understanding and alignment with Best Practices and does not, by itself, create a contractual partnership or modify the terms of any existing written agreement between the parties.

Signature

Partner Organization: _____

Authorized Representative (Name): _____

Title: _____

Signature: _____

Date: _____

Credit.org Acknowledgment

Springboard Nonprofit Consumer Credit Management, Inc. dba Credit.org

Authorized Representative: _____

Title: _____

Signature: _____

Date: _____