2018 Community Investment & Giving Annual Report
OUR COMMUNITY MISSION
Heritage Bank is committed to improving our communities by driving impact in the areas of:

• Business & Economic Development
• Education & Youth Development
• Environmental Stewardship & Social Equity
• Health & Human Services

We will pursue all of our community work and support with a holistic focus on equity and inclusion. Our thriving company culture engages our employees and inspires them to serve our communities in the pursuit of positive change.
We give to the community because we’re a part of the community.

From the beginning of our company over 90 years ago, giving back has been an integral part of our values. As one of the four pillars of our mission, community investment is about more than just giving time and money. It’s about creating hope and opportunity so our local communities can continue to thrive year after year.

I believe this philosophy is what makes our culture so unique. We don’t just encourage our employees to give back, we empower them—to offer suggestions, bring new ideas to the table and advocate for those in need. As CEO, I’m fortunate to see how generous they are, how well-known they are in their communities and the positive impact of their work. Their support comes in a variety of forms, from volunteer work to philanthropic giving, and it’s their passion that makes Heritage Bank what it is today.

Realizing the significance of our contributions, we better defined our charitable goals to ensure we’re reaching those who need us most and driving impact in four specific areas: economic development, education and youth development, environmental stewardship and social equity and health and human services. Our collective effort is on ensuring the communities where we live and work remain resilient, sustainable and viable.

We can make an impact at a scale and level of effectiveness that none of us could achieve on our own. By uniting the passion and commitment of our employees, community members and local organizations, we can create sustainable solutions that will continue to change lives for years to come.

In this report, you will see the lasting impact our company has throughout the Pacific Northwest.

Sincerely,

Jeffrey Deuel
President and CEO
HELPING OUR NEIGHBORS ISN’T JUST SOMETHING—it’s who we are.

Heritage Bank believes in the possibilities for each and every person—and the power of community to improve the lives of those around us.
SPOTLIGHT
United Way Day of Caring

MONTH OF SEPTEMBER

United Way Day of Caring is held every September and is one of the largest volunteer events in Washington. Heritage Bank had the biggest turnout to date—with over 50 employees volunteering in four different counties. Employees planted gardens, cleaned up yards, painted houses and organized clothes and school supplies for students in need.

DAY OF CARING
BY THE NUMBERS
- 273 hours volunteered
- 51 employees
- 4 counties

Last year, 230 Heritage employees donated 4,427 hours to 258 organizations to complete 1,228 activities in the communities we serve.

Top Volunteers
These employees each volunteered over 100 hours of their time.

Brett Willis
Kathleen Swift
Jace Dwinell
Kristen Connor
Arnie Gunderson

Mark Caviness
Melissa McCumber
Daryl Fourtner
Steve Vincent
**CORPORATE MATCH PROGRAM**

Heritage Bank will match each employee’s donation dollar-for-dollar to the community organization of their choice, up to $100 each year.

---

**Match Madness**

**MARCH 15 - APRIL 3**

For three weeks in March, employees’ donations were matched two to one. There were even weekly “bracket winners” where employees could win a bonus match!

- Employee Donations: $9,450
- Bank Match: $17,675
- Number of Employees: 101

---

**United Way Employee Pledge Campaign**

**NOVEMBER 26 - DECEMBER 7**

With the help of our generous employees, Heritage reached our annual goal of $45,000, which was donated to local United Way chapters and partner agencies throughout Washington and Oregon.

- Employee Pledge: $49,247
- Number of Employees: 317
- Bank Match: $15,000
- Goal: $45,000
"Understanding the need to feed hungry children is important, and Heritage Bank’s food drive helped many kids not to worry about where their next meal was going to come from. It gives me great satisfaction to be part of an organization that brings about awareness and helps make a difference."

Chad Maiuri, SVP, South Sound District Manager

Bank-Wide Food Drive
MONTH OF AUGUST

Heritage Bank teamed up with Northwest Harvest, Emergency Food Network and the Oregon Food Bank to host a food drive during the month of August. All 65 branches had collection bins for kid-friendly non-perishable food items. There was even an option for people to make cash donations through text messaging.

- Goal: 60,000 meals
- Meals collected: 51,176
- Bank Match: $5,706.12

HeritageBankNW.com
Affordable Housing

Heritage Bank was awarded three Affordable Housing Program (AHP) grants from the Federal Home Loan Bank of Des Moines (FHLB) to support affordable housing initiatives in its communities.

- $600,000 will support Panza’s project to build tiny homes for veterans in Orting, WA
- $750,000 will help Plymouth Housing Group build permanent housing for people experiencing homelessness
- $750,000 will go towards Northwest Housing Alternatives’ plan to build 24 affordable housing units for veterans in Oregon City, OR

“Our partnership with FHLB Des Moines and its grant program is vital to developing and preserving affordable housing in our communities. As a long-standing member of the FHLB Des Moines, we submit grants each year on behalf of our clients who are making an impact on affordable housing in the region.”

Randy Robinson, SVP, Community Development Lending
DOING GOOD IS PART OF OUR DNA.

Sustainability at Work Certification PORTLAND

The Portland team received the Gold Sustainability at Work certification to recognize their positive impact on the environment and their community.

Green Team

EcoChallenge
- 525 gallons of water saved
- 295 minutes spent outdoors
- 150 plastic containers recycled
- 28 sustainable meals consumed
- 21 pounds of waste composted

Oregon Bike More Challenge
- 24% of employees participated
- 139 miles cycled in May 2018
- 3 new riders
SPOTLIGHT
Emergency Food Network Repack Project

JANUARY – NOVEMBER (ONCE A MONTH)

Heritage Bank kicked off a 12-month partnership with the Emergency Food Network (EFN) and committed to having a team participate in one repack project per month. These projects consisted of repacking fresh, frozen and dry bulk foods into smaller family-sized portions that were distributed to communities in need. Heritage’s goal was to make it on EFN’s top ten leaderboard for most pounds repacked and ended the year in the number three spot!

BY THE NUMBERS
- 133 Heritage employees repacked 108,312 pounds of bulk foods into 83,317 meals
- 814 pounds per person
- 23,868 pounds were repacked in a single event

In 2018, we volunteered with and contributed to over 700 organizations in the communities we serve, including:

United Way
Relay For Life
Emergency Food Network
Sea Mar
Junior Achievement of Washington
Boys & Girls Clubs of America
WE BELIEVE IN THE POWER OF COMMUNITY TO IMPROVE THE LIVES OF THOSE AROUND US.

Kathleen Swift  
SVP, Commercial Banking  
175 volunteer hours

“I volunteer because we have a duty to help others less fortunate than ourselves... I joined Heritage Bank because I saw it was a true community bank that intentionally invested in the people and local nonprofits who are making a positive difference for those who might otherwise fall through the cracks. It isn’t just photo ops and pretty words; it’s action, and I’m proud to be a part of the bank’s efforts.”

Kathy joined Heritage Bank in 2017. She serves as a board member for Catholic Charities of Oregon, Jesuit Volunteer Corps Northwest, the Parish Trust Fund for the Archdiocese of Western Oregon and Portland Community Reinvestment Initiative (PCRI). She also works with Save First, a financial wellness nonprofit for families, and Cascadia Behavioral Healthcare, which provides housing and mental health services throughout the Portland area.

Kathy loves to mix her support of nonprofits with her hobbies, putting her fabric arts and crafting talents to work creating gala centerpieces and auction items, including one fabric wall hanging that sold for $6,000 at a live auction for one of her favorite organizations!

Brett Willis  
SVP, Commercial Banking  
195 volunteer hours

“I am grateful to work for an employer who understands the importance of giving back because we are only as strong as the communities in which we work and live. When I think about why I volunteer, I think about my favorite quote by Mahatma Gandhi, ‘The best way to find yourself is to lose yourself in the service of others.’”

Brett is a board member of Pierce College Board and the Greater Tacoma Community Foundation. Brett has been with Heritage Bank since 2016 and enjoys traveling with his wife, family and friends because he believes that experiences are the memories that last.
When neighbors help
neighbors, the whole
community benefits.
And that’s true prosperity.

Learn more about our commitment to community at
HeritageBankNW.com/community