

## Federal Reserve Banks' Small Business Credit Survey Roles and Responsibilities of Distribution Partners

Thank you for agreeing to work with the Federal Reserve Banks on their annual Small Business Credit Survey. The Federal Reserve Banks of Atlanta, Boston, Chicago, Cleveland, Dallas, Kansas City, Minneapolis, New York, Philadelphia, Richmond, St. Louis, and San Francisco (the "Reserve Banks," "us," "we") conduct an annual Small Business Credit Survey (the "Survey"). The Survey provides policymakers, business representatives, and service providers with timely information about business financing and credit conditions. To administer the Survey, the Reserve Banks partner with organizations ("Distribution Partners") across the nation to reach potential survey participants.

Qualifying Distribution Partners include nonprofit 501(c)(3) or 501(c)(6) organizations and state or local government entities. Non-eligible organizations include for-profit lending entities and organizations that are currently regulated by the Federal Reserve, Office of the Comptroller of the Currency ("OCC"), or Federal Deposit Insurance Corporation ("FDIC") or may be regulated by federal regulatory agencies in the future.

The roles and responsibilities of a Distribution Partner are listed below.

1. Share the Survey invitation and link provided by us with your members and small business contacts during the time period specified by us.
2. Promote the Survey on your website and social media channels; and send email messages, alerts and newsletters, including reminders as requested by us in keeping with your regular communications practices.
3. In distributing the Survey invitation, please do not suggest that any of the Reserve Banks endorse your organization, as this is inconsistent with the nature of the survey. You may describe our relationship as a "partnership to conduct the *Small Business Credit Survey*." The Reserve Banks will use this language to describe the relationship and will not imply any endorsement of the Survey by our Distribution Partners.
4. When any Reserve Bank releases a report based on the Survey data, or press releases or other communications through its website, social media or other channels, the Reserve Bank may name you as a Distribution Partner.
5. The Reserve Banks plan to publish reports and findings using Survey data; the reports will be shared publicly and with the Distribution Partners. We cannot promise to provide Distribution Partners advance notice of releases or copies of reports.
6. Responses from Distribution Partners are not guaranteed to be included in public reports.
7. If the Survey yields a sufficiently high number of completed surveys from participants who responded to an invitation that they received from your organization, we will provide you with analytics based on those responses. Any analytics provided must be kept internal to your organization.
8. As the owner of the Survey and all of the responses, the Federal Reserve Banks will maintain all of the raw Survey responses/data. In the future and if the Survey continues to yield a sufficiently high level of meaningful responses, we may make anonymized Survey data available to qualified researchers to support research and analysis on the small business sector.