

# 2019 Impact Report



Ignite.

Inspire.

Respond.



# CHANGING LIVES

The year 2019 was one of catalytic impact, thought leadership and influential industry change. Through our work to ignite understanding and focus on member financial health and well-being; to inspire and create opportunities for credit unions to leverage cooperative values and to respond when disaster struck, the Foundation changed people’s financial lives through credit unions.

2019 IMPACT HIGHLIGHTS

\$100,000

given in grants to improve financial health and well-being.

184

graduates from the DE Program.

800

credit union organization employees Explored their “Why?”

\$42,000

distributed in disaster relief grants through CUAid.

“The National Credit Union Foundation is a testament to the cooperative spirit and the credit union purpose of bringing people together to help improve the lives of so many. They work tirelessly alongside credit unions around the country to help build stronger communities, nurture future leaders and improve the financial wellbeing for all of us, so tomorrow may be better than we can imagine today.”

Bill Cheney, President/CEO,  
SchoolsFirst Federal Credit Union




# WE LOVE WHAT WE DO


**Our Mission:** To serve as a catalyst to improve people’s financial lives through credit unions.

**Our Vision:** Making financial freedom achievable through credit unions.


**Our Values:** We’re focused on serving our team, our communities and our movement. Here’s how:




**Connect People with Possibilities:**  
Collaborate, promote inclusion and think differently




**Drive Progress:**  
Constantly challenging the status quo to create positive change



**Uphold Transparency:**  
Build trust through truth and respect



**Honor Commitments:**  
Own our work and are responsible



**Lead with Passion:**  
Empower through empathy, enthusiasm and gratitude

# IGNITE

- **IGNITE** passion and knowledge around member and employee financial health and well-being.



## CU FINHEALTH™19

Leading credit union conference on financial health and well-being that dives into measuring, improving and documenting member and employee financial health.

**90** Attendees

**5** scholarships given to credit union employees

- Be a part of the conversation! Follow #cufinhealth on social to see insights and knowledge around member and employee financial health.

“

The conference provided an opportunity to share experiences with each other and build a great network of resources to tap into for the future. I left the conference invigorated with ideas and seeds of information to build programs to aid our membership in building their financial wellness.”

**Joy Tafarella,**  
scholarship recipient from  
Cal Poly Federal Credit Union.

## 2019 GRANTS:

Empowering credit unions to understand where their staff and members are on their financial well-being journey.

**\$75,000**

in financial health grants

**8**

Organizations



**\$36M**

granted to credit union organizations since 2005

Transforming the financial futures of the next generation through the Biz Kid\$ program.

**\$25,000**

for Biz Kid\$ Business Plan Competitions

**3**

Organizations



“

I think that the BizKid\$ competition teaches students real world skills by taking a break from the standard textbook curriculum by showcasing real word scenarios. The competition very much sparked my interest in business. I’ve always been an organized person, so the careful planning that comes with creating a business plan was like second nature to me. I’m glad that there is a career path available that suits my interests.”

**Faith Guerrero,** past participant of a Biz Kid\$ Entrepreneurship Contest and is now in college studying business.



# INSPIRE

► **INSPIRE** the credit union movement to leverage their cooperative values to help members face modern challenges.

## FOUNDATION DINNER PRESENTING THE HERB WEGNER MEMORIAL AWARDS

“

Never in my wildest dreams would I have thought that I would be receiving this tremendous recognition. The legacy of Herb Wegner and the past recipients is inspiring and I will work hard every day to uphold the legacy.”

Diana R. Dykstra



900

Attendees



2

**Outstanding Individual Achievement Awards**

**Crystal Long,**  
President/CEO of GECU

**Diana R. Dykstra,**  
President/CEO of the  
California & Nevada  
Credit Union Leagues

1

**Outstanding Organization Award**

**Nusenda Credit Union Foundation**  
for their Co-op Capital Program

1

**Anchor Award**

**Brett Martinez,** President/CEO of Redwood Credit Union for leadership during the 2017 California wildfires.

## EXPLORING WHY™ WORKSHOPS

Helping employees understand the “why” behind their work to drive greater value for your members and organization.

13

Organizations

800

Employees reached

## DE TRAINING:

Transformative training for established and emerging credit union leaders.



184

graduates in 2019

2,000

CUDE graduates to date

97%

Net Promoter Score

35

countries represented

“

DE training will challenge you to see beyond the traditional ways credit unions can help their members and the broader community. Your experience will change how you view situations and people by applying a positive approach to truly make a difference in their lives.”

**Dan McCue,** Alaska USA Federal Credit Union.



# RESPOND

► **RESPOND** when disasters strike by quickly harnessing collective generosity through CUAid.



**\$17,000**

granted for the  
Alaskan Earthquakes

**\$25,000**

granted for  
the California Wildfires

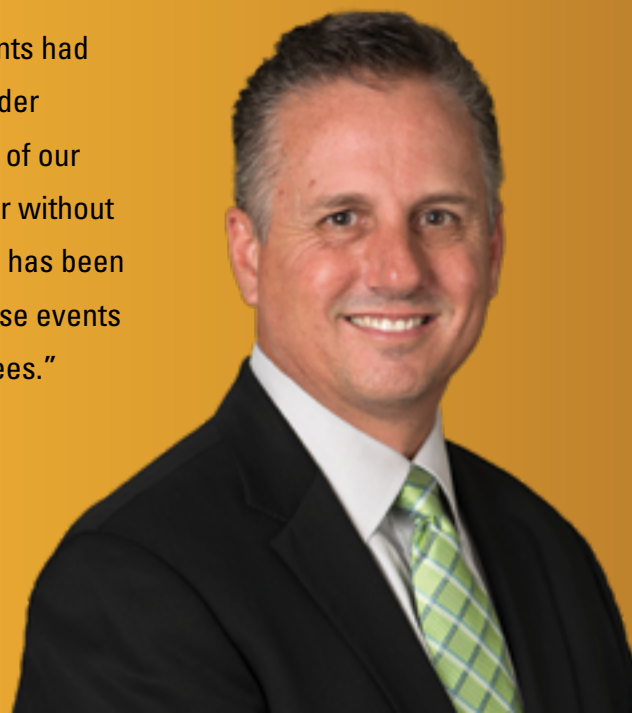
**100%** of donations go  
towards disaster  
recovery efforts

**\$9M** distributed  
since 2005



During the Kincade Fire, nearly a million residents had their power shut off and about 200,000 were under mandatory evacuation. This meant the majority of our employees were evacuated from their homes or without power for several days. I'm thankful that CUAid has been able to assist with the financial burden that these events have caused our staff and many of our employees."

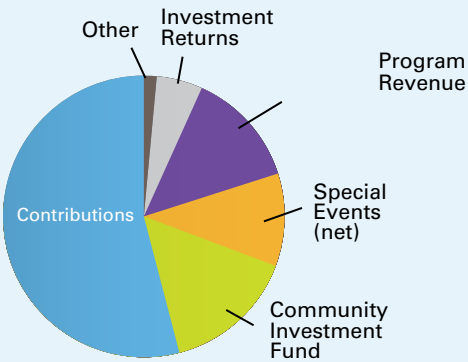
**Brett Martinez,**  
President & CEO of Redwood Credit Union.



# FINANCIALS

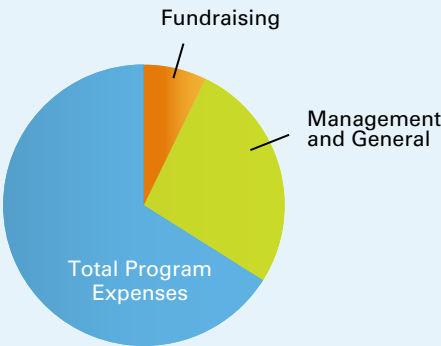
## Revenue and Other Sources

Contributions	\$2,323,345	55%
Community Investment Fund	683,398	16%
Special Events (net)	376,501	9%
Program Revenue	622,614	15%
Investment Return (net)	232,468	5%
Other	21,387	1%
<b>Total</b>	<b>\$4,259,713</b>	<b>100.0%</b>



## Program Expenses and Supporting Services

<b>Program Expenses</b>		
Disaster Relief	\$80,457	
Development Education	714,777	
CIF Grants and Outreach	719,269	
REAL Solutions	479,434	
Biz Kid\$	143,033	
Program Services	163,599	
<b>Total Program Expenses</b>	<b>\$2,300,569</b>	<b>65%</b>
Management and General	892,710	25%
Fundraising	334,909	9%
<b>Total Expenses</b>	<b>\$3,528,188</b>	<b>100.0%</b>
Unrealized Gains on Investments	480,924	
<b>Change in Net Assets</b>	<b>\$1,212,449</b>	
Net Assets - Beginning of Year	7,242,111	
<b>Net Assets - End of Year</b>	<b>\$8,464,560</b>	



# 2019 BOARD OF DIRECTORS



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Chairman  
President/CEO  
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President/CEO  
Metro Credit Union  
Chelsea, MA



**David Mooney**  
President/CEO  
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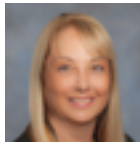
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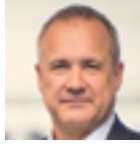
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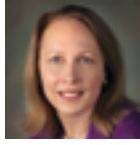
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PSCU  
Tampa, FL

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Engagement Director

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Marketing Coordinator

**Maggie Wolff**  
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**Kathy Heiderscheit, CUDE**  
Accounting Data Specialist

**Traci O'Neill**  
Executive Assistant

**Lacey Yasick, CUDE**  
Communications Senior Manager

# 2019 DONORS

## Sustaining Circle (\$150,000+)



## Leadership Circle (\$100,000+)



## Platinum Supporter (\$50,000+)



## Gold Supporter (\$25,000+)

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Ent Credit Union  
Fidelity Information Services FISERV  
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Georgia Credit Union League  
Heartland Credit Union Association  
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KEMBA Financial Credit Union Inc  
La Capitol Federal Credit Union  
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Mastercard  
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## Bronze Supporter (\$5,000+)

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America First Federal Credit Union  
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Cornerstone Credit Union League  
Corporate America Family Credit Union  
Corporate Central Credit Union  
CU Business Group  
CU Solutions Group  
CUNA Councils  
CUNA Strategic Services  
DIRECT Federal Credit Union  
Enterprise Holdings  
First Tech Federal Credit Union  
Gesa Credit Union  
Guadalupe Credit Union  
Hanscom Federal Credit Union Charitable Foundation Inc  
HawaiiUSA Federal Credit Union  
HealthCare Associates Credit Union  
Indiana Credit Union Foundation  
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Mazuma Credit Union

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New York Credit Union Association (CUC Services Inc.)  
Northwest Credit Union Association  
Northwest Credit Union Foundation  
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South Carolina Federal Credit Union  
Star One Credit Union  
Summit Credit Union  
Travis Credit Union  
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Vizo Financial Corporate Credit Union  
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Westconsin Credit Union  
Wisconsin Credit Union League  
World Council of Credit Unions

**Steel Supporter**  
(\$1,000+)

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ABCO Federal Credit Union  
Allegacy Federal Credit Union

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AmeriCU Credit Union  
Arkansas Superior Federal Credit Union  
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Bay Federal Credit Union  
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First Nebraska Credit Union  
Five Star Credit Union  
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HealthCare Plus Federal Credit Union  
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Jefferson Financial Federal Credit Union  
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Members 1st Credit Union  
Members 1st Federal Credit Union  
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Montana Credit Union  
Mooney, David  
National Institutes of Health Federal Credit Union  
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Numerica Credit Union  
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Wesenberg, Pat  
Westerly Community Credit Union  
Westerra Credit Union  
White River Credit Union  
WyHy Federal Credit Union  
Xceed Financial Credit Union  
Young, Dean

Based on contributions from 1/1/19 – 12/31/19.

In compiling this list, accuracy was a primary concern. We extend our sincerest apologies to any donor, the name of which, may have been incorrectly reflected or unintentionally omitted. If you should find such a discrepancy, please call us at (800) 365-9655 ext. 4979

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**800.356.9566 x4397**

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