Young Professionals: Making Real Impact in Credit Union Communities
Hi!
Your Panelists
Leadership Training & Impact

Rachel Barker
Director of Branch Operations
Holy Rosary Credit Union
Kansas City, MO
Background

• 18 months front line at a big bank learning the ropes of how a financial institution works
• 1 year as an AmeriCorps VISTA at Holy Rosary Credit Union
• 6 months as a Fellow through the Federation’s CFLA program at HRCU
• 2014 GAC Crasher
Holy Rosary Credit Union

• 18 million in assets, close to 5,000 members
• Began as 1 credit union serving 1 parish in 1943 to serving 98 parishes in the Catholic Diocese of Kansas City-St. Joseph, plus other local organizations
• Focuses on the low to moderate income (LMI) population of Kansas City
• A mission that has been lasting throughout the years is ‘People helping people’.
The Federation & HRCU

- A relationship was developed to seek out expertise on helping the LMI population
- Holy Rosary CU is a designated community development credit union through the Federation
- This led to leadership opportunities for HRCU & other CDCU credit union staff members
Cooperative Finance Leaders for America (CFLA)

- Federation initiative to recruit and train new and emerging leaders into the credit union movement
- 6 month fellowship which began with a focus on community development finance, CU operations and rules and regulations
- Training included 1 week at Federation HQ in New York City and ongoing online webinars & updates
- Holy Rosary CU has sent 6 staff members through training
Impact of Leadership Training

• Answers the question, “What’s the big picture & where do I fit in?”
• Focuses on job specific training
• Establishes a network of other young professionals in a similar credit union environment
• Opens the door to other opportunities
Final Thoughts

• Use opportunities such as CFLA & Crashers to build leadership within organization
• Encourage your young professionals to see themselves in the big picture of the credit union
• Use training to strengthen current skill set
Engaging Employees

Danielle Buscher
Learning & Development Manager
West Community Credit Union
O’Fallon, MO
Educate

• New Employee Training
• Ongoing Training
• Corporate Messages
• Encourage Education through Social Media
Engage in the Industry

• Join the Cooperative Trust
• Apply for Crashes
• Join CUNA Council or CUES Next Gen
• Get involved in Chapters or State/Regional YP Networks
• Crash your own Board Meeting
Engage in Community

• Look for YP Networks at the Chamber of Commerce for the communities you serve.
Advocate

• Work with your state league to provide advocacy training.
• Give them the opportunity to engage with lawmakers.
Develop Special Opportunities

• Work with Marketing/Business Development to spread CU message.
How we did it?

- Developed an internal network for passionate employees with a desire to work hard, learn, and engage.
In conclusion...

• Educate them about the Cooperative Principles and CU Difference.
• Help them engage in the credit union industry and the community.
• Create opportunities to advocate.
• Create special opportunities to tap into their CU passion.
A secret to success with our younger generation

By: christopher curry, 2015 GAC Crasher
Background

- CREDIT UNION: Hawaii First FCU
- LOCATION: Big Island Hawaii
- ASSET SIZE: $34 Million
- NUMBER OF MEMBERS: 7,501
- NUMBER OF BRANCHES: 2
- NUMBER OF COMMUNITY RESOURCE CENTERS: 2
- CDFI CERTIFICATION: 2007
- NATIVE CERTIFIED: 2009
- POSITION: Compliance and Development Manager
- YEARS IN CREDIT UNION: 7 Years
Capitalizing on your ‘Field of Dreams’
Hawaii First CRC
Theory of Change
August 2012
The Relatability Factor

“How can I trust your information when you’re using such outdated technology?”
Take Financial Education into the education system

- Step One: **EMPOWER STAFF**
  - CCUFC
  - CDCFC
  - Build expectations in the workplace

- Step Two: Build financial education into the **STRATEGIC PLAN**
  - Money First Workshops
  - HUD Approved Homebuyer Education Workshops
  - Individual Private Counseling
  - Youth Money First Workshops

- Step Three: **Identify and Partner with ALLIES**
  - Elementary Schools (Deposit Days)
  - High Schools (Financial Literacy Coursework)
  - University (VITA & Workshops)
Bringing the education system into the credit union

• Accredited Internship Programs
  – WHS ALEX Program
• Work Experience Programs
  – UH Hilo Internship Program
• Volunteer Programs for Local High school and Colleges
  – VITA Program
  – Tailored Volunteer Positions
Key Points

• Young professionals can play an integral role in strategic or vision planning for your organization.

• Young professionals can bridge the gap with younger generations and increase the effectiveness of community development objectives.
  – Take financial education into the education system by empowering your staff, incorporating it into your strategic plan and partnering with your allies.
  – Bring the education system into the credit union through unique and empowering opportunities.
Questions?
Thank you.