

/ inclusiv /

January 2019

Welcome New Members!



[Southern Teachers & Parents FCU](#)
Baton Rouge, LA



[FIDECOOP \(Fondo de Inversión y Desarrollo Cooperativo\)](#)
San Juan, PR

Don't Miss This FREE Member Benefit: CDFI Annual Certification Reporting Assistance



In 2018, Inclusiv prepared CDFI Annual Certification Reports (ACRs) for 98 of our member credit unions, and we hope to assist you with the 2019 CDFI ACR as well! This service is offered as a FREE benefit of membership to all Inclusiv credit unions that [opt-in by January 31st](#). The aggregate data we collect provides unique insights into our membership and CDFI credit unions, and helps us to most effectively advocate on behalf of our member CDCUs to secure greater resources and funding for credit union activity.

The CDFI Fund now requires all certified CDFIs to complete mandatory ACRs in order to maintain their certification and are required to submit their ACR within 90 days of the organization's fiscal year. We know that the new 90-day reporting deadline, in addition to the unavailability of CDFI Fund services during the government shutdown, will make completing ACRs this year especially difficult for many of our member CDFI credit unions. [As your CDFI Fund advocate](#), we are eager to help our members through this reporting and recertification process, and are working on your behalf to restore a 180-day due date for 2019, as well as to establish greater consistency in setting all future years' ACR deadlines going forward.

If we assisted you with your CDFI ACR in 2018, you have been automatically registered for assistance in 2019 and we will reach out to you directly to discuss data collection. If you did not participate in the free CDFI ACR assistance service in 2018, but would like to enroll in the service for 2019, please follow the link below and **submit your registration no later than January 31, 2019**.

[Register Here for Free 2019 CDFI ACR Assistance](#)

Inclusiv/Capital and Inclusiv/Mortgage Present: 2019 Economic Outlook and What's Ahead for CDFIs

Inclusiv/Capital and Inclusiv/Mortgage will host an economic briefing for credit unions on Tuesday, February

5, 2019. Join Inclusiv and guest experts as they share the economic outlook for 2019, as well as discuss the updated CDFI certification process and how your credit union can prepare for these changes. Speakers include Jeffrey D. Korzenik, Chief Investment Strategist at Fifth Third Bank (pictured), and Terry Ratigan, Senior Consultant at Inclusiv.



2019 Economic Outlook and What's Ahead for CDFIs

Tuesday, February 5, 2019

2:00 PM - 3:00 PM EST

[Register today](#)

Clinton Global Initiative Features Inclusiv's Work in Puerto Rico

Inclusiv is honored to be among those featured by the Clinton Global Initiative to make a 2019 CGI Commitment to Action for our Puerto Rico CDFI Initiative and work with cooperativas in post-Hurricane Maria recovery efforts.



On Tuesday, January 29, President Bill Clinton and Secretary Hillary Clinton will convene the third meeting of the Clinton Global Initiative (CGI) Action Network on Post-Disaster Recovery, bringing together leaders from government, business, and civil society to make commitments to help communities impacted by the 2017 hurricane season. At the meeting, Inclusiv and other participants will discuss the current recovery efforts in the region, progress to date, ongoing challenges, and Commitments to Action focused on continuing recovery and building resilience in the region.

Our impact to date:

- Two on the ground training sessions
- Four financial cooperatives receive \$482,179 in CDFI technical assistance grants
- First financial cooperative CDFI certified in Puerto Rico
- Engaged the Federal Reserve Bank of New York, the FDIC, SBA and the U.S. Treasury Department's CDFI Fund in our work
- Facilitated collaborations with CDFI credit unions on the mainland

2019 CDFI Convening for Financial Cooperatives in Puerto Rico



Inclusiv, in collaboration with the Asociación de Ejecutivos de Cooperativas de Puerto Rico and the Federal Reserve Bank of New York, announce the 2019 CDFI Convening for Financial Cooperatives in San Juan, Puerto Rico, February 6-7, 2019. The event is a follow up to two CDFI meetings organized by Inclusiv in 2018 in the aftermath of Hurricane María. The Convening will expand on CDFI certification and grant application processes and will be an opportunity for credit unions

serving the Puerto Rican diaspora in Florida, Illinois, Pennsylvania, California, Ohio, New York, Connecticut, Texas and Massachusetts to connect with Puerto Rico's credit union executives, as well as nonprofit organizations who are working in Puerto Rico, and explore potential partnerships.

2019 CDFI Convening for Financial Cooperatives

February 6-7, 2019

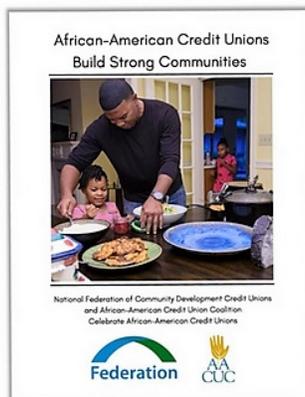
Up to \$2M Available: New Funding Round for Secondary Capital

Inclusiv/Capital is excited to expand its offerings to include 10 year secondary capital loans. Secondary capital is a catalytic resource in scaling the double bottom line -- both the financial growth and community impact of credit unions. Inclusiv has launched the Spring funding round of Inclusiv/Capital Secondary Capital to expand innovative credit union services to new and emerging markets. Secondary Capital loans of up to \$2 million are available to launch high-impact community development products. **Applications will be reviewed on a rolling basis through February 9, 2019.**



[Click here to learn more.](#)

Inclusiv and AACUC Celebrate African American Credit Unions During Black History Month 2019



In recognition of Black History Month, Inclusiv is again partnering with the African-American Credit Union Coalition to highlight and celebrate the important role that African American credit unions and African American credit union industry leaders play in promoting financial inclusion within the communities they serve. Follow us on [LinkedIn](#), [Twitter](#) and [Facebook](#), where we'll be posting content all month long, using the hashtag **#BlackHistoryMonth**.

CUNA GOVERNMENTAL AFFAIRS CONFERENCE

March 10-14, 2019, Washington, D.C.

Save the Date: Inclusiv Events at the Government Affairs Conference

Mark your calendars for our special sessions at CUNA's 2019 Government Affairs Conference in Washington, D.C. and stay tuned for more information as we get closer to GAC.

- **March 11, 2019:** Inclusiv CDFI Roundtable at GAC
- **March 12, 2019:** Juntos Avanzamos meeting at GAC (coordinated by Coopera)

Visit us at Booth # 261!

Save the Date: Inclusiv 2019 Annual Conference



Join us September 16-18, 2019 in Los Angeles for the only conference devoted to inclusive economies and the community development credit union movement. Our Annual Conference is the premier event for CDFI certified credit unions -- don't miss out! Add the Inclusiv Conference to your 2019 calendar today.

Stay tuned! Registration for the Inclusiv Conference opens Spring 2019.

Inclusiv Participates in Economic Inclusion Panel



Cathie Mahon, Inclusiv President/CEO, was in Madison, Wisconsin this month speaking about financial inclusion, diversity and the inclusive economy, in a panel sponsored by CUNA Mutual Group, alongside Emilia Istrate of the National Cooperative Business Association CLUSA International, Anne Reynolds of the UW Center for Cooperatives and Edgar Villanueva of the Schott Foundation for Public Education. Pictured L-R: Anne Reynolds, Cathie Mahon, Emilia Istrate, and panel moderator Angela Russell.

Career Opportunities

Posting of positions on the [Inclusiv Careers page](#) is free for all Inclusiv members. To submit, modify or remove a listing, please contact us at info@inclusiv.org.

Inclusiv Job Opening

- [Research Director \(New York, NY\)](#)

Inclusiv Member Job Openings

- [Chief Experience Officer -- Alternatives FCU \(Ithaca, NY\)](#)
- [Special Projects Manager -- Self-Help FCU \(California\)](#)

About Inclusiv

At Inclusiv, we believe that true financial inclusion and empowerment is a fundamental right. We dedicate ourselves to closing the gaps and removing barriers to financial opportunities for people living in distressed and underserved communities. Inclusiv is a certified CDFI intermediary that transforms local progress into lasting national change. We provide capital, make connections, build capacity, develop innovative products and services and advocate for our member community development credit unions (CDCUs). Inclusiv members serve over eight million residents of low-income urban, rural and reservation-based communities across the US and hold over \$80 billion in community-controlled assets. Founded in 1974, Inclusiv is headquartered in New York, NY, with offices in Madison, WI and Atlanta, GA. For more information about Inclusiv visit us at Inclusiv.org and connect with us on [Facebook](#), [LinkedIn](#) and [Twitter](#).



www.inclusiv.org | info@inclusiv.org | 212-809-1850

