

# / inclusiv /

## June 2019 Newsletter

### Welcome New Members!



[Clean Energy FCU](#)  
Englewood, CO  
Terri Mickelsen, CEO



[La Comeriena](#)  
(Coop A/C La Comeriena)  
Comeriena, PR  
Ruth Berrios Gonzalez, CEO



[Rocket FCU](#)  
McGregor, TX  
Terry Sloan, CEO

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### Early Bird Registration for 2019 Inclusiv Conference Ends July 8th

Join us September 16-18, 2019 in Los Angeles for the only conference devoted to inclusive economies and the community development credit union movement. This year's conference promises to deliver exciting sessions on how to better reach and serve low-income markets; applying principles of design theory to new products and services; sustainability and resiliency of credit unions; promoting and growing diversity, equity and inclusion in our field ...and much more!

Visit [cvent.com/d/76qr7w](http://cvent.com/d/76qr7w) to learn more about sessions, speakers, hotel and more, and enjoy discounted early bird registration pricing. But act fast! **Early bird rates expire Monday, July 8th.**



**2019 Inclusiv Conference**  
September 16-18, 2019 | Los Angeles, CA  
Omni Los Angeles Hotel at California Plaza

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### Juntos Avanzamos Network Sees Record Growth in 2019



Inclusiv announced the largest expansion of the Juntos Avanzamos credit union network since the program went national three years ago.

Since January of this year, 11 credit unions have received the prestigious Juntos Avanzamos designation. This new group of Juntos Avanzamos credit

unions programs affordable, relevant, bi-cultural and bilingual services to over 418,000 consumers in six states, and expands the Juntos Avanzamos presence to the state of Idaho.

Inclusiv and its Juntos Avanzamos League partners, the Cornerstone Credit Union League, the California and Nevada Credit Union League, the League of Southeastern Credit Unions & Affiliates, the New York Credit Union Association and the Northwest Credit Union Association, welcome [Alive Credit Union](#), [Cy-Fair Credit Union](#), [Guardians Credit Union](#), [Icon Credit Union](#), [MPS Credit Union](#), [Pasadena Service Federal Credit Union](#), [Premier America Credit Union](#), [Rocket Federal Credit Union](#), [Southern Chautauqua Federal Credit Union](#), [Tucoemas Federal Credit Union](#) and [TTCU Federal Credit Union](#) to our growing network! [Read more.](#)

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## Greylock FCU Celebrates Juntos Avanzamos Proclamation Ceremony

This month, [Greylock Federal Credit Union](#) in Pittsfield, MA celebrated the largest Proclamation Ceremony in Juntos Avanzamos history! More than 300 members of the community participated in the event, which included food and music from Puerto Rico, Colombia, Mexico and Ecuador. Credit union members, community leaders, public officials, representatives from Inclusiv and the Cooperative Credit Union Association gathered to celebrate this important milestone, and welcome Greylock to the Juntos Avanzamos family. [Read more.](#)



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## Pathways Hosts Summer 2019 Cohort Training in NYC



Attendees were all smiles at the Pathways Summer 2019 Cohort Training this month in New York City. Pictured here visiting Inclusiv's newly-renovated NYC offices, the Pathways team trained a cohort that included a dozen participants, representing three credit unions ([MECU of Baltimore](#), [New Orleans Firemen's FCU](#), [Stepping Stones Community FCU](#)) and [On The Rise Financial Center](#).

[Pathways to Financial Empowerment](#) is an impact-driven model and technology platform that takes your credit union's financial counseling program to the next level by streamlining and tracking your program's impact. Want to learn more about strengthening your financial counseling program with Pathways? **Attend the Pathways Bootcamp in Los Angeles on September 19 -- free for 2019**

## Time to Renew: 2019-20 Membership Year Begins July 1

Inclusiv's 2019-2020 membership year begins on July 1st, 2019. On behalf of Inclusiv, the only network of credit unions with a mission of financial empowerment and inclusion, we thank every CDCU in the Inclusiv Network for your important role in continuing to propel the community development credit union movement forward and invite you to reaffirm this commitment to financial inclusion and empowerment by renewing your Inclusiv membership today!



Credit Union Network

In addition to participation in the only U.S. network of credit unions with a mission of financial empowerment, Inclusiv members enjoy discounted registration rates for our Annual Conference; access to our [Inclusiv/Capital](#) and Mortgage Center products; innovative programs and products through [Inclusiv/Communities](#); advocacy, technical assistance, trainings, and webinars as part of the [Inclusiv/Network](#); and cutting-edge technology solutions through [Inclusiv/Technology](#). This year, as a free member benefit, Inclusiv provided assistance with the preparation and submission of CDFI Annual Certification Reports (ACRs) for more credit unions than ever before! We prepared ACRs for 114 CDCUs and continue to offer free CDFI eligibility assessments for our members on an annual basis. We look forward to assisting all of our CDFI certified members with their 2020 ACRs! To begin or continue receiving [valuable benefits](#) such as these and many more, please join us for the new membership year as a proud member of Inclusiv. **For assistance or questions about Inclusiv membership, please contact Jules Epstein-Hebert, Membership Program Officer at [jhebert@inclusiv.org](mailto:jhebert@inclusiv.org).**

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## Lower Valley CU Welcomes Visit from Congressman Dan Newhouse



On May 31, Inclusiv member Lower Valley Credit Union met with Congressman Dan Newhouse (R-WA) to understand how CDFI credit unions build inclusive communities. Coordinated by our partner OFN, Newhouse has been a long time member of Lower Valley and supports the credit union's ground breaking efforts to meet the needs of Hispanic consumers. Lower Valley was the first credit union to obtain the Juntos Avanzamos designation in the Pacific Northwest.

[Read more.](#)

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## Funding Opportunities for CUs

### National Credit Union Administration Community Development Revolving Loan Fund

For low-income credit unions interested in applying for Community Development Revolving Loan Fund grants this year, please note NCUA's Office of Credit Union Resources and Expansion will accept grant applications from July 1 through August 18. [Click here to learn more.](#)

**Need assistance or grant application support? Inclusiv member CDCUs are encouraged to contact us at [network@inclusiv.org](mailto:network@inclusiv.org).**

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# Accelerate Financial Inclusion: ITIN and Small Business Implementation Workshops



Join us for one of our Accelerate Financial Inclusion: ITIN and Small Business Implementation Workshops, a free learning opportunity supported by Juntos Avanzamos -- brought to you by Inclusiv, Coopera, Filene Research Institute, and PolicyWorks -- and offered in 5 cities across the country from May - September 2019. **The next workshop will be in New York City on July 16-17.**

These interactive workshops will teach financial institutions to expand their lending programs to include individual taxpayer identification number (ITIN) lending and small business lending.

Visit [filene.org/2019workshops](http://filene.org/2019workshops) to register and learn more.

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## Save the Date: Aug 15-16 Inclusiv Meeting & Workshop with Local CUs in Birmingham, AL

Inclusiv will host a breakfast meeting for local credit unions in Birmingham, AL on Thursday, August 15 from 9-11am. This gathering will be an opportunity for credit unions to network, share updates, discuss opportunities, and learn more about Inclusiv's efforts to promote CDCU growth and sustainability in the region, including our work with the Federation of Southern Cooperatives.



On August 16, Inclusiv will be presenting at a workshop that is focused on organizing and chartering efforts. This workshop will take place in the afternoon at the FSC training site in Epes, AL. Stay tuned for additional details in the coming weeks. For questions and additional information, interested credit unions in the region can contact Pamela Owens at [powers@inclusiv.org](mailto:powers@inclusiv.org).

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## Partner Events: African-American Credit Union Coalition & Federation of Southern Cooperatives



**21st AACUC Annual Conference**  
August 6 - 10, 2019 | Charlotte, NC  
[Click here for more information](#)

**FSC Annual Meeting/Estelle Witherspoon Award Dinner**  
August 15 - 17, 2019 | Epes, AL  
[Click here for more information](#)



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## Welcome New Staff Members Desmond, Mia and Beverly!

Team Inclusiv is growing! This month we welcomed two new staff members in Inclusiv's New York City offices. Mia Deschamps joined us as Research Director on June 10 and Desmond Anthony joined Inclusiv as our new Director of Inclusiv/Mortgage on June 27. Last month we also welcomed Beverly Westbrooks as a Lead Coach and Financial Education Facilitator for our On the Rise Financial Center in Atlanta, GA. She officially joined the On the Rise team on May 6. Welcome all!



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## 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 \$92 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](http://Inclusiv.org) and connect with us on [Facebook](#), [LinkedIn](#) and [Twitter](#).



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