New at Inclusiv: January 2020

Welcome New and Returning Members!

Alive CU  
Jacksonville, FL  
Rose Gunter, CEO

Allegiance CU  
Oklahoma City, OK  
Amy Downs, CEO

Astera CU  
Lansing, MI  
Martin Carter, CEO

Coop Hermanos Unidos  
Hato Rey, PR  
Antonio Rodriguez, CEO

Coop Santa Isabel  
Santa Isabel, PR  
Vivian Morales Cruz, CEO

Faith Cooperative FCU  
Dallas, TX  
Stephanie Johnson, CEO

Fox Valley CU  
Aurora, IL  
Kyle Whelan, CEO

NAS JRB FCU  
New Orleans, LA  
Helen Delin, CEO

San Mateo CU  
Redwood City, CA  
Wade Painter, CEO

---

Special Offer for 2020 Inclusiv Conference Registration

The Inclusiv Annual Conference is the largest gathering of credit unions with a mission of financial inclusion in the country. Register today to join us for the 2020 Inclusiv Conference in San Juan,
Puerto Rico at the El San Juan Hotel on May 4-6, 2020. And because space is limited, be sure to reserve your seats for this year's site visits to Cooperativa Jesús Obrero, Cooperativa Sagrada Familia and Bonicoop, and for the Pathways Bootcamp (now offered in both English and Spanish!) during checkout when completing your Conference registration.

2020 Inclusiv Conference
May 4-6, 2020
San Juan, Puerto Rico

SPECIAL OFFER FOR CREDIT UNIONS THAT HAVEN'T YET ATTENDED THE INCLUSIVE CONFERENCE:
Enjoy $100 off the conference registration price if this is the first year your credit union is attending the Inclusiv Conference! Simply enter promo code NEWAC20 at checkout when you register.*

*Special offer applies to registrants currently employed by a credit union that has not perviously sent an employee to attend the Inclusiv Conference. This offer does not apply to staff at credit unions that have previously been represented at the Inclusiv Conference.

Inclusiv and Member CU Participate in NY Fed's Investment Connection Pitch Program

This month, Inclusiv’s Cathi Kim and René Vargas Martínez traveled to Puerto Rico to participate in the Federal Reserve Bank of New York's Investment Connection Pitch Program. Investment Connection helps to match local organizations whose proposals may qualify for credit under the Community Reinvestment Act (CRA) with banks and other investors. Inclusiv member credit unions Credicentro Coop, Coop Jesus Obrero, Cooperativa Sagrada Familia and Coop Zeno Gandia also participated in the program and presented their pitch proposals.

To access the proposals and learn more, click here.

Call for Nominations: 2020 Annie Vamper Helping Hands Award

The Annie Vamper Helping Hands Award is the highest honor presented by Inclusiv, celebrating individuals whose work exemplifies the legacy of Annie Vamper through a demonstrated commitment to the CDCU movement and financial inclusion. Inclusiv member credit unions are invited to nominate staff, board members and volunteers for this prestigious award. Please submit nominations by March 4, 2020.

The 2020 Helping Hands Award honoree will be announced March 13th and formally recognized at the Annie Vamper Helping Hands Award Luncheon on May 4th during the 2020 Inclusiv Conference in San Juan, PR.
Click here to learn more about Annie Vamper and previous awardees. Recent honorees include: Maurice Smith, CEO of Local Government FCU (pictured, 2019); Linda Levy, CEO of Lower East Side People’s FCU (2018); and Jim Masini, Board Treasurer of North Side Community FCU (2017).

For questions about the Annie Vamper Helping Hands Award, please contact Pamela Owens at powens@inclusiv.org.

---

**Free for Members: 2020 CDFI Certification Annual Reporting and Eligibility Assessments!**

The CDFI Fund now requires all certified CDFIs to complete Annual Certification Reports (ACRs) in order to maintain their certification. This level of reporting can be an added burden for many credit unions, but Inclusiv is happy to take that work out of your hands. As a valuable benefit of membership, Inclusiv provides free ACR assistance to all CDFI-certified Inclusiv members, and free CDFI eligibility assessments and assistance to Inclusiv members seeking certification.

Let us make your CDFI recertification as painless as possible—enroll in our free CDFI ACR assistance service in 2020 by signing up via the link below no later than January 31, 2020. If we assisted you in 2019, you have been automatically registered for assistance in 2020.

Enroll Now: Free 2020 CDFI ACR Assistance!

For questions about this offer, CDFI certification or becoming an Inclusiv member, please contact Jules Epstein-Hebert at jhebert@inclusiv.org. Please note that Inclusiv reserves the right to assess a cost for this service on registration submissions received after January 31st.

---

**Register Today! Inclusiv's 9th Annual CDFI Roundtable at GAC**

Join Inclusiv and the CDFI Fund for our 9th Annual CDFI Credit Union Update at the 2020 CUNA Governmental Affairs Conference in Washington, D.C. Space is limited so register today!

**Inclusiv's 9th Annual CDFI Credit Union Update at GAC**

Monday, February 24, 2020 | 11:30 am - 1:00 pm
Washington Convention Center | Room 204 A/B/C

[REGISTER]
The Inclusiv Advocate: New Monthly Advocacy Roundup

Advocacy at the State-Level

- Success in securing a proposal of $25 million in funding for CDFIs in New York State over the next five years. Click here to read more.

Advocacy at the National-Level

- Inclusiv joined our members HOPE CU and Self-Help FCU, along with the National Association of Latino Community Asset Builders, in signing an amici curiae brief filed by the Center for Responsible Lending in support of the Consumer Financial Protection Bureau (CFPB) before the Supreme Court. Click here to read more.

Do you have advocacy issues you would like Inclusiv to be involved with? We’d love to hear from you! Please submit questions and ideas via email to jhebert@inclusiv.org.

Notes From the Field: Update on Puerto Rico Earthquakes

Inclusiv Program Officer René Vargas Martínez was visiting family in Puerto Rico when two earthquakes rocked the island this month.

Rene reports back on the widespread damage that was caused and shares information on how to help in the latest Notes from the Field. Several industry organizations are accepting donations in support of Puerto Rico’s earthquake victims, including: Asociación de Ejecutivos de Cooperativas de Puerto Rico, New York Credit Union Foundation and WOCCU’s Worldwide Foundation. Read more.

Conference Update: Please note that the El San Juan Hotel, where Inclusiv will be hosting the 2020 Inclusiv Conference on May 4-6, 2020, was not damaged, has full power and is operating as normal. For more information about the conference, registration and hotel, please visit www.cvent.com/d/phqnc1.

Member News: Members Credit Union
This month, we were pleased to see Inclusiv member and Juntos Avanzamos-designated credit union, Members Credit Union recognized as a "best-practice credit union" in a CUInsight article on credit union adaptability. Click here for the full article or read an abbreviated excerpt from the story below.

"Members Credit Union (Cos Cob, Connecticut) is a best-practice credit union that had to dramatically change its priority target market in order to adapt, located in one of the most economically polarized areas of the country: Greenwich, Connecticut. Four years ago, the credit union's leadership identified a lower-income, Latino target market in their field of membership that was underserved and largely unserved. This lower-income, minority group was the polar opposite of the predominately white, middle class (and aging) membership they had experience serving for 80-plus years.

But leadership was energized by the prospect of serving a population who really needed a credit union – their credit union. There has been a significant cultural shift, ROAA has doubled since 2017, used auto loans have increased 80 percent, and net membership growth is a positive 2.6 percent. It’s managing growth, limiting loan losses, and increasing average loan yield. It’s so popular now, new members are driving across the county to get to the credit union’s only branch office. During 2018, the credit union was nationally recognized by Inclusiv with the Juntos Avanzamos designation, acknowledging its commitment to serving its local Latino community. During 2019, its success was further validated by the U.S. Treasury CDFI with a $120,000 grant that will be used to hire an additional loan officer to keep up with consumer loan demand.

Truly, Members Credit Union is an inspiration and best practice, showing that even the smallest of credit unions can adapt and remain relevant."

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 Openings

- Communications Officer (New York, NY)
- Director, Resiliency and Clean Energy Finance (New York, NY)

Member Job Opening

- 1st Choice CU -- Chief Executive Officer (Atlanta, GA)
- Self-Help -- Investment Associate (Oakland, CA)

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 10 million residents of low-income urban, rural and reservation-based communities across the US and hold over $112 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.

Inclusiv was instrumental in establishing the CDFI Fund in 1994, is a permanent member of the national CDFI Coalition and is the CDFI and community finance authority for the credit union industry. Our member CDCUs represent over 10 million members in low-income communities across the US, representing the majority of all CDFI-certified credit unions. Today, CDFI certification is an essential credential for credit unions with a focus on financial inclusion. Inclusiv is the credit union industry’s best resource for learning more about certification and technical and financial assistance grants. For more information on our advocacy on behalf of CDFI credit unions, click here.