



MEMBERS

ALTRUISM AL FRESCO

These credit unions put feet on the street to help their local communities

By Linda Formichelli

Doing charity work from your chair is amazing — but getting yourself and your staff out from behind the screens to work hands-on with the community offers numerous benefits: Neighbors get to know the real face of your credit union, office-bound staff get out into the community, and outside-the-credit-union volunteer opportunities play to your employees' unique interests and strengths.

Read on to discover credit unions that are fostering a commitment to — and connection with — their communities outside the credit union.

Crossing the Finish Line to a Closer Community

The Boston Marathon is a huge event: In 2018 alone, close to 27,000 runners from more than 90 countries ran the race. So, what better way to bring attention and funding to a cause you care about than to participate in the race yourself?

For Hanscom Federal Credit Union, it all started in 2001 with a 4-year-old boy named Andy, who was born with spina bifida. It was Hanscom's first time participating in the Boston Marathon through Credit Unions Kids at Heart, a regional organization that raises money for Boston Children's Hospital.



Andy Martin Jr. represented Team Hanscom Federal Credit Union as a wheelchair racer in the 2015 Boston Marathon. Hanscom Federal Credit Union has been participating in the Boston Marathon for almost two decades.

When Hanscom's board of directors member Ray Phillips met Andy, his "patient partner," at one of the fundraising events, Andy looked up at Ray from his wheelchair and asked, "Are you running for me?" Ray, and Hanscom, were hooked.

"He and Andy developed quite a relationship," says MaryJo Kurtz, Hanscom's director of communications. "Each year when Ray ran the marathon, he'd put Andy on his shoulders and run him over the finish line at the end." When Andy turned 18 in 2014, he represented Hanscom as a wheelchair racer — and this year, Ray

was one of only 130 men in the 70–74 age range to finish the marathon.

It's not only runners who participate. "It's a team effort all across the credit union," says Kurtz. "Everybody is in some way involved in our fundraising activities, from the branches that sell collectors' pins to the members who donate. The marketing department puts together the messaging, and we also have employees who volunteer their time on weekends to help our runners train."

Volunteering in the event also lets Hanscom engage with the local

community. Hanscom keeps members abreast of marathon-related news through blog posts and press releases, and they also keep their employees updated through the credit union intranet — from how much money they've raised to how no-longer-little Andy is doing.

It's been almost two decades since that first race, and the Boston Marathon has become a major event for the entire credit union. Says Kurtz, "We enjoy being able to live the credit union motto of 'People Helping People' through the marathon."

Doing Well by Promoting Wellness

Many businesses and organizations offer employee wellness programs — but not many of those programs turn into a full-fledged community wellness center.

Allegacy Federal Credit Union in Winston-Salem, N.C., started a free gym for its employees 10 years ago. The credit union then expanded its wellness program to offer yearly health screenings and health and nutrition coaching. "When we started, we had an average of 2.4 critical risk factors per employee," says Cathy Pace, president and CEO of Allegacy. "After eight years, we reduced that to 1.2."

The wellness program had such a positive influence on Allegacy's employees, they wondered how a similar initiative might help their community as a whole — especially during today's health care crisis.

The answer: A lot.

In February 2018, Allegacy partnered with Wake Forest Baptist Health, one of the largest health and medical centers in the country, to create WellQ — a first-of-its-kind, membership-based clinic that addresses both physical and financial wellness. WellQ members pay a small annual fee to access a low-cost health clinic for everyday needs; walk-in, complimentary monitoring of common health conditions; wellness and financial



Cathy Pace (left), president and CEO of Allegacy, and Julie Ann Freischlag (right), M.D., CEO of Wake Forest Baptist Medical Center and dean of Wake Forest School of Medicine, partnered to create WellQ — a clinic that addresses both physical and financial wellness.

classes; and much more. The clinic is located in the Innovation Quarter in Winston-Salem's revitalized downtown area, giving it a good visibility boost that attracts local residents.

Just a few months in, WellQ, which is structured as a CUSO, already has more than 300 members: 417 individuals, 26 families and seven businesses.

The biggest challenge Allegacy faced when co-creating WellQ was people's confusion around this new idea. "We were talking about something that doesn't really exist in the current marketplace, a concept that does not fully conform to strict medical or financial norms and expectations," says Pace. "Often the initial response to our work was confusion, and even resistance, and it took time for us to articulate our vision in such a way that others could understand it and support it."

When asked how other credit unions might follow Allegacy's example, Pace says, "Look at what makes you unique. This may not work for other credit unions to do in their community, but they may have something else that's different."

control, and Weickenand wanted to do something to help it regain the trust of the local community.

The result was Orion Gives Back, which supports local charities with money and volunteers. "We're in the city where St. Jude is the 300-pound gorilla when it comes to raising money for a great cause," says Weickenand. "It's an amazing organization, but our money wouldn't make any change at all in that size of an organization. But there are a lot of important nonprofits in our community where the money we can provide will move that organization forward significantly — so that's where we focus."

Orion Gives Back started small, and as the program became more and more successful, the credit union kept putting more money and man-hours into it. Now, each month the credit union donates \$3,000 to one or more nonprofits. Orion employees are encouraged to volunteer for nonprofits — and their volunteer hours are on the clock, so the time comes out of their work schedule, not their home lives. As of this writing,

Giving Big Gifts to Small Nonprofits

It was 2010, and Daniel Weickenand had recently come on board as CEO of Orion Federal Credit Union in Memphis, Tenn. The credit union was under regulator



The Orion 5K marathon benefited the Memphis nonprofit St. Patrick Community Outreach.



Orion employees filled food boxes to be delivered to the homebound in their community during the holidays.



Orion is a sponsor of the free music concert series at the Levitt Shell in Memphis, Tenn.



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— DANIEL WEICKENAND, CEO, ORION FEDERAL CREDIT UNION



Each month, Orion Federal Credit Union donates \$3,000 to one or more nonprofits.

Orion employees built bikes that were donated to the Salvation Army and distributed to kids in Memphis, Tenn.

Orion has amassed more than 900 man-hours of volunteering.

When asked what causes Orion Gives Back has supported, Weickenand laughs. “All of them,” he says. Some examples include inner-city youth, hunger, literacy, the arts, health and human services, community learning gardens and special needs.

Most recently, the credit union launched the inaugural Orion 5K, which benefited the Memphis nonprofit St. Patrick Community Outreach. Orion also adopts 10 schools, one near each of its branches. Orion employees are present in those schools all year, serving as test proctors, reading support and field trip chaperones. Each August, Orion employees help teachers set up their classrooms for the new school year, and every May, Orion honors those teachers with appreciation receptions.

Orion Gives Back helps the credit union’s employees feel an increased

sense of community — and the community itself is responding by joining the credit union in droves. “Most of the community reaction has been incredible,” says Weickenand. “We’ve just about doubled in assets since I’ve been here.” It all fits in with the credit union’s mantra: “A better Memphis is a better Orion.”

Bringing Talent Together to Solve the Retirement Crisis

How can a credit union bring new people into the field, help credit union managers who are in transition and engage the local millennial community? William Kennedy, president and CEO of HUD Federal Credit Union in Washington, D.C., has found a way.

Kennedy spearheaded a comprehensive talent management program with three prongs: Current college students are interns, recent graduates are management trainees — and credit union veterans in transition are hired as consultants to work with those trainees. “Every once in a while there are some

really talented people who are in transition for whatever reason,” Kennedy explains. “I let them know that this [mentor program] is a less-than-six-month endeavor because, in general, it takes three to six months to find a new job.”

These seasoned vets see their roles as much “bigger-picture” than HUD Federal Credit Union: “They’re helping to create a farm system to create a supply of new faces to address the pending credit union management retirement issue,” says Kennedy. “So, they’re possibly saving the movement!”

As for the recent college grads, the management training program is set up so that every nine months or so, each trainee switches into two new disciplines out of eight disciplines total; that way they’re exposed to almost every aspect of the credit union experience, from member services to IT.



HUD Secretary Dr. Ben Carson (right) shakes hands with DeAndre Watson, HUD Federal Credit Union Management Training Program participant, as intern June Li (far left) looks on.



From left: HUD Secretary Dr. Ben Carson, finance intern Nickeisha Wellington, DeAndre Watson and HUD Federal Credit Union President and CEO William “Bill” Kennedy.