

CAROLINAS CREDIT UNION FOUNDATION



# *Gala*

FEBRUARY 5, 2021



# A Special Thanks

## Host Sponsors



## Program Sponsors



## Supporting Sponsors



# 2020 UnGala HONOREES

## 2020 CUNA STATE-LEVEL WINNERS

CAROLINA Foothills  
Family Trust  
Mountain  
NOVA  
Palmetto Citizens  
TruLiANT  
SRP  
State Employees'  
Summit

## 2020 UNGALA EMCEES

**CREIGHTON BLACKWELL, CUDE**  
Coastal Credit Union  
Chief Culture & Impact Officer

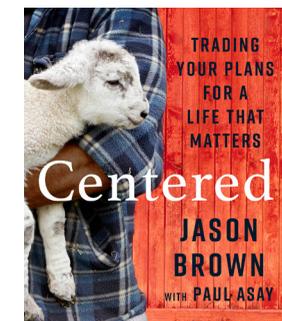


**LAUREN WHALEY, CUDE**  
Carolinas Credit Union Foundation  
President



## SPECIAL GUEST INTERVIEW

**JASON BROWN**  
Former former NFL lineman, Author and Founder of First Fruits Farm



Attendees of the UnGala have the opportunity to support the Carolinas Credit Union Foundation with a tax-deductible donation.

Text "CUFoundation" to 76278 for a link to donate or visit [CUFoundation.givesmart.com](http://CUFoundation.givesmart.com).

The first 50 people to donate \$50 or more will receive an autographed copy of Jason Brown's new book!

# DESJARDINS

ADULT FINANCIAL EDUCATION AWARD

The Desjardins award program was created to recognize leadership within the credit union movement on behalf of financial literacy for all ages. Named after credit union pioneer Alphonse Desjardins, the program emphasizes the movement's longtime commitment to youth and personal financial education.

## 1<sup>ST</sup> PLACE | NOVA CU | \$50 MILLION-\$250 MILLION IN ASSETS

Nova CU implemented a Breaking Free from The Money Traps Program to provide an intensive and in-depth financial education experience for adults. This program concentrates on key financial education topics such as budgeting, credit and savings, pitfalls and threats, and the basics of banking. This program is on top of the credit union's ongoing efforts to educate adults at member and community events, and with credit counseling offered to members participating in Nova's credit score analysis program.



# DESJARDINS

ADULT FINANCIAL EDUCATION AWARD

## 2<sup>ND</sup> PLACE CAROLINA Foothills FCU \$50 MILLION-\$250 MILLION IN ASSETS

In the spring of 2020, Carolina Foothills FCU created a series of video sessions to assist members and the community who needed financial guidance during the COVID-19 pandemic. These live sessions shared specific topics such as mortgage deferrals and other critical questions members and the general public had. One live session with Relentless Church was recorded and uploaded to YouTube, and has received thousands of views.

**UNDERSTANDING FINANCES, MORTGAGE AND TENANT RIGHTS DURING COVID-19** JUNE 18 @ 2:00PM EST  
with Pastors John and Averter Gray and Special Guests Live on Facebook

Grace Simonelli  
Martin Watson  
Mark Fessler  
Sara Carter

LIVE

## 3<sup>RD</sup> PLACE | MOUNTAIN CU | \$50 MILLION-\$250 MILLION IN ASSETS

Mountain CU engages its membership and the local community in a variety of ways. Their branches are Financial Wellness Centers where members can work closely with credit union staff to understand their finances and relieve financial stress. In the community, the credit union regularly conducts financial wellness seminars, lunch and learns and school visits. Mountain CU has 10 Certified CU Financial Counselors on staff to help members make sense of their finances and increase their financial well-being.



# DESJARDINS

ADULT FINANCIAL EDUCATION AWARD

## 1<sup>ST</sup> PLACE | PALMETTO CITIZENS CU | MORE THAN \$1 BILLION IN ASSETS

For many years, Palmetto Citizens FCU has offered a comprehensive financial education program to its members and the community. Their strategy includes a new partnership with EverFi for an Online Financial Education Center, which debuted in early 2020. This online resource includes more than 30 modules covering a broad range of financial topics, from budgeting, to credit, investing, home ownership and many more. Since debuting in April during the COVID-19 pandemic, more than 7,500 members have accessed this online tool.



APRIL NEWSLETTER



### April is Financial Literacy Month

For each playlist you complete in our new Financial Education Center, you'll be entered to win one of ten \$100 cash prizes!\*

LEARN MORE

## 2<sup>ND</sup> PLACE | TRULIANT FCU MORE THAN \$1 BILLION IN ASSETS

Truliant FCU's Financial Education Grant program provides funding to teachers in order for them to provide financial education in the classroom. The program is a five-year, \$200,000 initiative aimed at increasing financial wellness in the communities served by the credit union. In 2019, Truliant provided more than \$40,000 in funding to 11 teachers and schools.



### Attention Teachers! Apply for a \$5,000 Truliant Financial Education Grant!

Truliant is awarding up to \$5,000 to educators for projects that incorporate financial education into their school's curriculum! These funds may be used for grades 6-12 to improve an existing program—or to implement a new one.

Funding can support:

- Classroom activities
- Professional development opportunities
- New and innovative ways to teach financial education

Topics can include budgeting, saving, investing, entrepreneurship, business, marketing, economics and more.

Be sure to apply by Oct. 31, 2019. To learn more about eligibility, or to apply, please visit our [Financial Education Web Page](#).

# DESJARDINS

YOUTH FINANCIAL EDUCATION AWARD

## 1<sup>ST</sup> PLACE | CAROLINA Foothills FCU | \$50 MILLION-\$250 MILLION IN ASSETS

Carolina Foothills FCU partnered with Furman University's Bridges to A Brighter Future to offer financial education and incentives for students to save money. Bridges to A Brighter Future recruits 25 ninth-grade students each year who are academic achievers at-risk of not finishing high school. These promising students participate in a Saturday College Program. The credit union added financial education to the Saturday College experience, with CFFCU staff attending the sessions. The credit union also provides financial incentives for attendance and for saving, with more than \$6,700 in matching funds provided by the credit union.



## 1<sup>ST</sup> PLACE | SUMMIT FCU \$250 MILLION-\$1 BILLION IN ASSETS

Summit CU utilized a grant from the National CU Foundation to implement the Taste of Reality Fair financial education program. The goal of the fair is to teach 13-22 year olds the importance of being financially savvy. The program assigns young people a job and income, and they must navigate key financial choices such as housing, transportation and entertainment. The credit union partnered with the Center for Smart Financial Choices, a local non-profit agency, to implement the Taste of Reality Fair.



### Taste of Reality Fair

September 28, 2019



# DESJARDINS

YOUTH FINANCIAL EDUCATION AWARD

## 1<sup>ST</sup> PLACE | SRP FCU | MORE THAN \$1 BILLION IN ASSETS

SRP FCU offers a robust financial education program that reaches young people in a variety of ways! In 2019, the credit union provided some form of financial education to an estimated 11,000 young people in the community. SRP utilized the Mad City Money financial simulation in area schools. In the summer of 2019, the credit union offered a Teen Money Management seminar. With the COVID-19 pandemic impacting the ability for the credit union to offer in-person financial education, its programs have been re-imagined virtually in 2020 with more than 2,400 young people accessing these programs in 2020.



## 2<sup>ND</sup> PLACE | PALMETTO CITIZENS FCU | MORE THAN \$1 BILLION IN ASSETS

Palmetto Citizens FCU is committed to providing financial education programs to tomorrow's adults. The credit union makes financial education presentations to schools and youth organizations. These presentation topics are tailored based on the specific needs and requests of educators and include key topics such as needs vs. wants, basic money management, plus budgeting and saving.



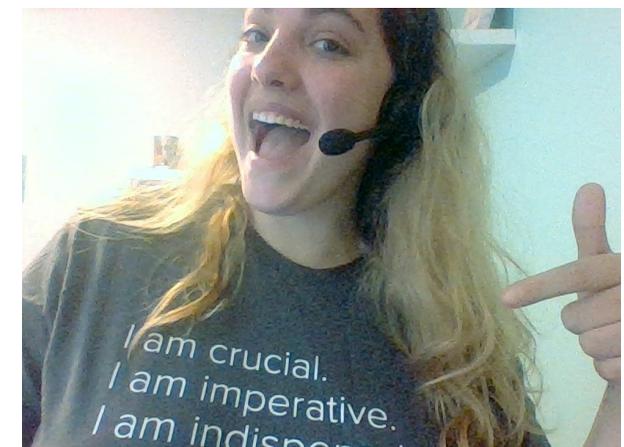
# LOUISE HERRING

PHILOSOPHY IN ACTION MEMBER SERVICE AWARD

The Louise Herring Philosophy-in-Action Member Service Award is given to a credit union for its practical application of credit union philosophy within the actual operation of the credit union. It is awarded for internal programs and services that benefit membership.

## 1<sup>ST</sup> PLACE | CAROLINA Foothills FCU | \$50-\$250 MILLION IN ASSETS

Carolina Foothills FCU provided Paycheck Protection Loans to 68 area small businesses. Nearly \$1.6 million in loans were approved, with the average loan amount being \$23,300. Carolina Foothills emphasized lending to minority and women owned businesses, as these entrepreneurs had largely been shut out of the PPP program by other lenders. All told, 51% of the loans went to minority owned businesses, with 46% of the loans made to female-owned businesses. 40% of the loans were made to new members who had been referred to the credit union.



# LOUISE HERRING

PHILOSOPHY IN ACTION MEMBER SERVICE AWARD

## 1ST PLACE | SRP FCU | \$1 BILLION IN ASSETS

SRP FCU launched a "Spotted" campaign to benefit members of the credit union and community. The credit union passed out SRP branded stickers in branches and in the community. People who were "spotted" with the sticker displayed on their cars or other vehicles win \$100 on the spot. In 2019, 549 people were spotted and benefited from a combined \$54,900! The credit union and its staff are so thrilled to benefit the community in this way, Spotted has been extended indefinitely.



## 2ND PLACE | PALMETTO CITIZENS FCU | MORE THAN \$1 BILLION IN ASSETS

When COVID-19 closed branches during the spring, the credit union encouraged employees to utilize EverFi, Palmetto Citizens' new online financial education program available to its membership. Staff members engaged with the 30 modules in the program in order to sharpen their financial education and to help members who were struggling through job loss and other issues created by the pandemic.



# DORA MAXWELL

SOCIAL RESPONSIBILITY COMMUNITY SERVICE AWARD

The Dora Maxwell Social Responsibility Community Service Award is given to a credit union for its external social responsibility projects within the community.

## 1ST PLACE | CAROLINA Foothills FCU | \$50 MILLION-\$250 MILLION IN ASSETS

Confronted by the COVID19 pandemic, Carolina Foothills FCU worked quickly to provide local food banks the support they needed through the Moving Our Community Forward initiative. The credit union re-purposed its travel and conference budget for 2020 to provide financial support to area food banks. More than \$10,000 in total supported the efforts to provide food support to hungry people in the Upstate. In addition, the credit union provided support to small businesses, provided face masks in the critical early months of the pandemic, and supported a local child care program offered at the YMCA through its LOVE LOCAL Marketing Campaign.



## 2ND PLACE | MOUNTAIN CU \$50 MILLION-\$250 MILLION IN ASSETS

Mountain CU, working in partnership with the Rotary Club of Haywood County, held a series of financial literacy classes for members of the Bethel, Canton and Clyde communities. These classes also included a savings incentive for participants that matched \$2 for every \$1 saved over a six-month period. All told, 12 participants in the program saved a total of \$8,400, and earned matching funds of \$6,500!



# DORA MAXWELL

SOCIAL RESPONSIBILITY COMMUNITY SERVICE AWARD

## 1<sup>ST</sup> PLACE | FAMILY TRUST FCU | \$250 MILLION-\$1 BILLION IN ASSETS

Family Trust FCU is a founding sponsor of the My Ride Rock Hill program, a free public transportation system in the city of Rock Hill. The bus routes were developed with strategic stops in neighborhoods where car ownership was low. As a result, the My Ride program increased transportation access to all areas of the city, increasing economic opportunity for all Rock Hill citizens. The buses are also all-electric, further enhancing the quality of life in York County's largest city. As a founding member, Family Trust FCU committed \$500,000 over a five-year period to the project.



## 2<sup>ND</sup> PLACE | SUMMIT CU | \$250 MILLION-\$1 BILLION IN ASSETS

Summit CU's internal Summit Wears Pink pledge and the Join the Huddle campaign with its membership raised funds for the Susan G. Komen Breast Cancer Foundation, Toys for Tots, and the Wounded Warrior Project. More than \$3,500 for three charitable organizations was raised by the membership when the credit union auctioned off Carolina Panthers tickets in exchange for donations to the charities by the bidders. Seven pairs of tickets to Panther home games went to the winning bidders.



# DORA MAXWELL

SOCIAL RESPONSIBILITY COMMUNITY SERVICE AWARD

## 1<sup>ST</sup> PLACE | STATE EMPLOYEES' CU | MORE THAN \$1 BILLION IN ASSETS

Responding to the enormous hurdles of COVID-19, SECU and the member-funded SECU Foundation announced a joint effort in April 2020 to provide up to \$10 million for disaster relief efforts statewide in North Carolina. Grants were immediately dispersed to multiple organizations for basic food, clothing, shelter, and financial needs. As the year progressed and the needs expanded, the combined efforts exceeded the original \$10 million commitment, which now totals over \$16 million for COVID-19 relief.



## 2<sup>ND</sup> PLACE | TRULIANT FCU | MORE THAN \$1 BILLION IN ASSETS

As COVID-19 challenged frontline workers and small businesses in the spring, Truliant FCU's made life a little easier through its People Helping People Initiative. This program fed healthcare workers and first responders more than 500 meals over a three-month period. The boxed lunches were purchased at local, non-chain restaurants. Employees throughout Truliant pulled together to coordinate and implement this initiative.



# DORA MAXWELL

SOCIAL RESPONSIBILITY COMMUNITY SERVICE AWARD

## 3<sup>RD</sup> PLACE | SRP FCU | MORE THAN \$1 BILLION IN ASSETS

SRP's Community Development Department continues to provide innovative programs to support the communities it serves. Its flagship Affinity Debit Card program continues to benefit schools. In 2019, students earned nearly \$220,000 for 27 area schools by using their branded debit cards. The card program is one of many efforts SRP undertook during the year to support community and charitable organizations.



*Congratulations*  
to all of this year's winners

# PAST HEROES

## 2019

### Individual Achievement Award

**Deb McLean**

Nova CU, VP Marketing & Business Development

### Lifetime Achievement Award

**Steve Harkins**

SC Telco FCU, CEO

### Lifetime Volunteer Achievement Award

**Bill Smith**

Coastal CU, Volunteer

### Lifetime Achievement Award

**Steve Smith**

Sharonview FCU, CFO

### Partner In Philanthropy Award

**Coastal Credit Union Foundation**

## 2017

### Individual Achievement Award

**Cathy Pace**

Allegacy FCU, President/CEO

### Lifetime Achievement Award

**Dorinda Edwards**

American Partners CU, President/CEO

### Lifetime Achievement Award

**John Radebaugh**

Carolinas Credit Union League, President/CEO

### Lifetime Volunteer Achievement Award

**Maria Scanga**

Latino Community CU, Board Chair

## 2015

### Individual Achievement Award

**Genice Decorte**

Healthshare CU, President/CEO

### Lifetime Achievement Award

**Glenn Kirk**

Summit CU, Board of Directors/Treasurer/Trustee

### Partner In Philanthropy Award

**Your Marketing Co.**

## 2018

### Lifetime Achievement Award

**Mark Schaefer**

Truliant FCU, CEO

### Partner In Philanthropy Award

**Robert Harris**

Health Facilities FCU, CEO

### Partner In Philanthropy Award

**Upstate Charitable Giving Committee**

## 2016

### Individual Achievement Award

**Mark Curran**

Lion's Share FCU, President/CEO

### Lifetime Achievement Award

**Jerry Miller**

Carolina Trust FCU, President/CEO

### Lifetime Volunteer Achievement Award

**Joan Nelson**

Coastal CU, Volunteer/Board Chair

### Partner In Philanthropy Award

**Creative Builders, Inc.**

## 2014

### Individual Achievement Award

**David Brehmer**

First Carolina Corporate CU, President/CEO

### Individual Volunteer Achievement Award

**Travis Walters**

SPC CU, Board Chairman

### Lifetime Achievement Award

**John Carlson**

Sharonview FCU, President/CEO

### Lifetime Volunteer Achievement Award

**George Price**

Piedmont Advantage CU, Board Member

### Partner In Philanthropy Award

**CUNA Mutual Group**

We can only hope that our Awards Gala in February 2022, will provide us with the opportunity to celebrate in-person the credit unions and credit union professionals that make our industry so remarkable.