

# Doing Good and Getting Noticed: Marketing Through Community Outreach

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# Doing Good and Getting Noticed

Helping Credit Unions  
Serve, Grow and Remain Strong



# Credit Union Philanthropy

Credit unions are **nonprofit** member-owned financial cooperatives operating under a universal set of operating principals.

## Principle #7: Concern for community

- Credit Unions have a social mission to improve their communities.

## Strategic Philanthropy:

What is your strategic plan for giving?

- Connect what you are doing to improve the community and community member lives with your products and services.



Credit Unions:  
Strengthening  
the Financial  
Well-Being of  
Michigan!



## Put Your Money Where Your Mission Is!

- Does our outreach and philanthropy advance our mission?
- Does it strengthen the financial well-being of the community?
- Does it contribute to the goal of having people think of our credit union as a trusted resource for information and solutions that are in their best interest?

**How do people in our community know we are here for them?**



# Getting Noticed

Who do we want to notice?	Why?
Members	My CU does good things!
Potential new members	I should join, they do good things!
Community Leaders, Schools	Good will, community contributor, helping improve financial futures
Lawmakers	Protect CU tax status
What other audiences?	Why?



# Connecting

## Connecting your business to your donations and outreach:

- Your lending, savings and financial education; your key products and services
- Credit unions specialize in helping build financial capability
- Credit unions are trusted providers of financial education

## Connect to local and national organizations that help advance credit union principles and your mission

- Community support agencies
- State and National CU Foundations – financial education and community reinvestment initiatives
- Local, state and national initiatives that build financial capability – Money Smart Week, Asset Building Coalitions, Bankruptcy Task Forces....



# Financial Education Outreach

Helping Credit Unions  
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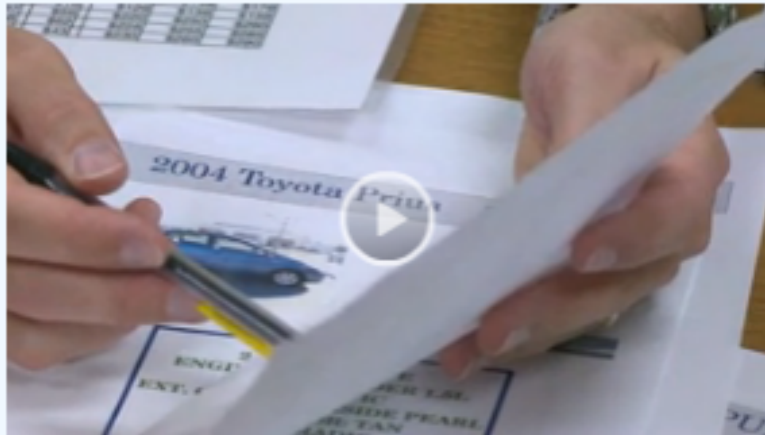
- **School CU's** 48 Michigan CU's operating 299 in-school branches
- **Financial Education Presentations** Michigan tops the nation!
- **Biz Kid\$** "Production funding for Biz Kid\$ is provided by America's Credit Unions, where people are worth more than money."
- **Financial Counseling Outreach** Certification training in April
- **Experiential Learning – *MCUF can help!***
  - Financial Reality Fairs: >21 fairs in 2015 reaching >2,300 students
  - Retire on Track Fairs
- **April is Financial Literacy Month** Hold a Financial Fitness Day, Money Smart Week or Credit Union Youth Week



# Financial Realty Fairs

[www.mcul.org/youth-financial-education-presentations](http://www.mcul.org/youth-financial-education-presentations)

## Teen Financial REALITY Fair



*Credit Unions help Flint teens learn about spending and budgeting at a Financial REALITY Fair*





# MCUF Grants

## Grants to assist with your community reinvestment and financial education Activities

- Building financial capacity through credit unions
- Community reinvestment activities
- Financial education activities
- Individual credit unions, chapters, groups and partnerships
- Especially for activities assisting unserved areas, urban renewal, underbanked, and low income

[www.MCUF.mcul.org](http://www.MCUF.mcul.org)



# Credit Union Foundations

## What do we want to accomplish?

## Is starting a foundation the right solution?

### Pros:

- Solicit and accept donations from members and public to use for foundation activities
- Increase perception of the credit union as a community supporter

### Cons:

- Significant resources needed for start-up and operation
- Legal, governance, tax, technology and reporting considerations



# Resources

National  
Credit  
Union  
**THE FOUNDATION**  
[www.ncuf.coop](http://www.ncuf.coop)

- Biz Kid\$ Grants
- REALSolutions Toolkits
- Financial Fitness Day

**MCUF**  
MICHIGAN CREDIT UNION FOUNDATION  
[www.MCUF.mcul.org](http://www.MCUF.mcul.org)

- Financial Reality Fair
- Retire on Track Fair
- Financial Education and Community Reinvestment Grants
- Financial Counseling Training

**MCUL**  
MICHIGAN CREDIT UNION LEAGUE & AFFILIATES

<http://www.mcul.org/financial-education-portal>

- Financial Education Tools and Resources
- School Credit Union Handbook
- Financial Education Presentations



# Put Your Money Where Your Mission Is

## What is the impact of our philanthropic giving and outreach?

- It is accomplishing our goals?
- Are we measuring? Can we document the impact?
- Is it getting noticed?
- Is it helping us be seen as a trusted community partner?
- Is it helping to improve the financial lives of our members and our community?
- Is our giving advancing our mission?



# Examples and Best Practices

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