

/ inclusiv /

New at Inclusiv: December 2019



Registration Now Open for 2020 Inclusiv Conference

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

A blue banner with a white border and a slight shadow. The text "Welcome New Members" is written in a white, handwritten-style font.

Inclusiv Welcomes 31 New Members in 2019

In 2019, **31 new credit unions** joined the Inclusiv network (including **10 Puerto Rico cooperativas**), adding nearly **\$13 billion in assets** and an additional **900,000 members served**. Welcome to the Inclusiv family!

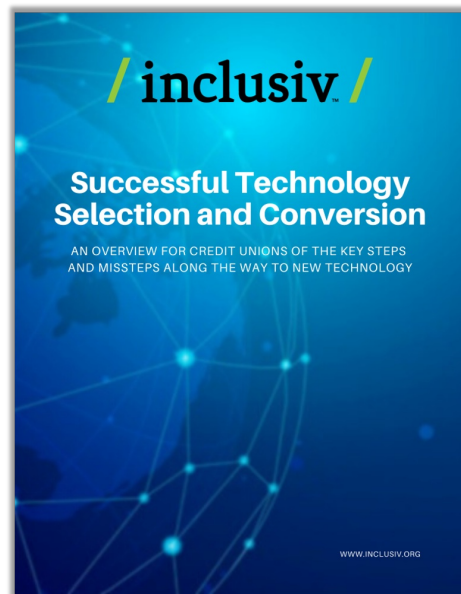
- Allegiance CU
- Altra FCU
- Ascension CU
- Blackhawk Community CU
- BuenaCoop (Coop A/C Aguas Buenas)
- Cabo Rojo Coop (Coop A/C de Cabo Rojo)
- Clean Energy FCU
- La Comeriena (Coop A/C La Comeriena)
- Coop Oriental (Coop A/C Oriental)
- Coop Rincon (Coop A/C de Rincon)
- Cutting Edge FCU
- Faith Cooperative FCU
- FIDECOOP (Fondo de Inversion y Desarrollo Cooperativo)
- First Central CU
- Fox Valley CU
- Kauai Government Employees FCU
- Lexington Avenue FCU
- MocaCoop (Coop A/C de Moca)
- Orlando FCU
- Premier America CU
- Puerto Rico FCU
- River City FCU
- Rocket FCU
- San Rafael Coop
- Security CU
- Simplicity CU
- Southwest 66 CU
- Team Financial FCU
- Tidemark FCU
- Wescom Central FCU
- Yaucoop (Coop A/C de Yauco)

Webinar: Overview of Successful Technology Selection & Conversion

Through our experience in working with technology partners to develop a state of the art core data processing system for CDCUs, we have learned a lot about the essential steps - and potential missteps - a credit union takes when selecting and onboarding onto a new core system or technology platform.

We are pleased to be able to share these learnings on **Thursday, January 9, 2020** in [An Overview of Successful Technology Selection and Conversion](#), a new webinar that will help our members who are contemplating or have embarked upon a conversion to understand the conversion process and plan for a successful outcome from system selection through onboarding.

In this one-hour session, we'll walk through best practices in the technology selection and conversion process together, highlight key recommendations and considerations for credit unions, and break down each step outlined in the new conversion guide, chapter-by-chapter. Register today to join Inclusiv CEO/President Cathie Mahon; credit union technology expert Debi Gupta; and Cheryl Fatnassi, President/CEO of Opportunities Credit Union for a deep dive on *Successful Technology Selection and Conversion: An Overview for Credit Unions of the Key Steps and Missteps Along the Way to New Technology*, Inclusiv's brand new conversion guide for community development credit unions.



REGISTER

Webinar: Successful Technology Selection and Conversion

Thursday, January 9, 2020 | 1:00 - 2:00 pm ET

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!

In 2019, Inclusiv prepared CDFI ACRs for 116 of our member credit unions and we hope to assist you with your 2020 CDFI ACR as well. We provide a streamlined template for data collection with straightforward instructions, run the analysis, and produce a draft report for your review. We'll even submit the report on your behalf with your approval.

This service also helps further the CDFI movement, as the aggregate data collected allows Inclusiv to conduct the industry's most comprehensive analyses of CDFI credit union impact on the communities they serve. This translates into stronger arguments for CDFI Fund appropriations.

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.

\$2M in Secondary Capital Available: Apply by Jan 31, 2020

Secondary capital is a catalytic resource in

scaling the double bottom line -- both the financial growth and community impact of credit unions. Secondary Capital loans of up to \$2 million are available from Inklusiv/Capital to launch high-impact community development products. All applications are on the Inklusiv's website, www.inklusiv.org/capital.

All low-income designated credit unions may apply, but only Inklusiv members in good standing may receive funding. Applicants are strongly encouraged to submit their completed applications electronically well in advance of the **January 31, 2020 cutoff date for the current funding round**. If you have questions, please contact us at capital@inclusiv.org or call Cathi Kim at 800-437-8711 or 212-809-1850, ext. 271.

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



Join Inklusiv 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!

[Inklusiv'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 Inklusiv Advocate: New Monthly Advocacy Roundup



This month, we released the first edition of The Inklusiv Advocate, a monthly news digest and roundup of Inklusiv's recent activities related to advocating on behalf of community development credit unions and the

communities they serve. We encourage you to get involved with these efforts and alert us to any opportunities for which Inklusiv's collective voice can help move the needle, so to speak. [Click here](#) to read this month's updates.

December highlights include:

- **Advocacy at the National Level:** Raising our voices to preserve protections for consumers and establish tools to strengthen MDIs
- **Advocacy at the CDFI Fund:** Success in resolving credit union concerns regarding the CDFI Fund's certification and reporting guidelines
- **Advocacy at the State-Level:** Work with local partners to preserve consumer protections and establish funding for CDFIs in New York State

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

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 \(New York, NY\)](#)
- [Senior Program Officer \(New York, NY\)](#)
- [Student Intern – Research and Data Analysis \(New York, NY\)](#)

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 nine million residents of low-income urban, rural and reservation-based communities across the US and hold over \$99 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](#).



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