

TruCommunity Impact Report



April 2021

Truliant.org

Truliant began 2021 celebrating Black History Month and Women's History Month.

In February, Truliant presented a financial education workshop to the Impact Leaders of **Profound Gentlemen** in Charlotte. Profound Gentlemen supports male educators of color and the challenges they face in the classroom. The organization provides professional development opportunities to the men, like Truliant's workshop about understanding credit.

Also in February, Truliant joined the **African American Credit Union Coalition (AACUC)**, an organization focused on increasing diversity within credit unions across the country. AACUC provides professional development opportunities and community conversations around diversity and inclusion.

In March, in celebration of Women's History Month and International Women's Day on March 8, Truliant's Charlotte staff donated nearly 200 purses and handbags to support **Dress for Success Charlotte**. Dress for Success is a national nonprofit that works with women to achieve economic independence by supporting them with professional skills, attire and tools to thrive in the workplace. Dress for Success Development Manager Sally Ganz explained the need for handbags. "We need handbags and purses year-round, yet we don't always get these items donated. We are appreciative to the Truliant staff for organizing this collection to meet our needs," Ganz said.

Also in March, several female Truliant leaders participated in events to celebrate Women's History Month. Judy Wishnek, Charlotte Commercial Market Executive, supported Dress for Success' "Your Hour, Her Power" initiative; Precious Squire-McCloud, Vice President of Member Experience for the Member Contact Center, was a featured speaker at **Habitat for Humanity Winston-Salem's Phenomenal Women** weeklong series; and Tiffany Harris, a Member Contact Center Manager, was a featured presenter for **Women's Resource Center** in Greensboro's program on virtual interviewing.



Impact Leaders from Profound Gentlemen came together to learn about credit in February.

“We are appreciative to the Truliant staff for organizing this collection to meet our needs.”
— Dress for Success Charlotte



Truliant's Charlotte teams donated handbags to Dress for Success in March.

Economic Mobility

Truliant continues to support nonprofit and community organizations that provide personal guidance and activities that build financial stability and social prosperity, through our focus on economic mobility.

In March, Truliant provided financial support to **Novant Health's** Arms Against COVID Mass Vaccination Initiative in Charlotte. Through the Arms Against COVID initiative, Novant is establishing temporary and pop-up mass vaccination sites in priority areas of Charlotte. These include the Michael Jordan Freedom Clinic, the Park Expo Center and various churches and schools across Charlotte. Novant's goal is to vaccinate more than one million people by July 2021. "Gifts from our community sponsors help improve access to the COVID-19 vaccine in the communities we serve," said Jennifer Clifford, Chief Development Officer for the **Novant Health Presbyterian Medical Center Foundation**. "With Truliant's generous support, we're able to help stop the spread, start the healing and saves lives."

Truliant supports Arms Against COVID because it addresses health and economic inequities among populations most vulnerable to COVID, which include low socio-economic groups, diverse communities and seniors. More than one third of Charlotte residents work in essential careers where they cannot work from home or cannot practice social distancing and risk getting sick, which would affect their finances. In 2020, Truliant provided support to the Novant Health screening center in East Winston, and fed frontline staff at screening centers in Kernersville, Winston-Salem and nursing staff at Forsyth Medical Center.



Photo courtesy of Novant Health Presbyterian Medical Center Foundation.

“Gifts from our community sponsors help improve access to the COVID-19 vaccine in the communities we serve.”

– Novant Health Presbyterian Medical Center Foundation

Truliant also recently provided a combination of charitable and sponsorship support to support **Families Forward Charlotte** and its Family Success Program. Through this program, families who are living in poverty are paired with Family Liaisons to provide mentorship, education and support as the families work to achieve long-term financial stability. The nonprofit also provides toiletries, grocery gift cards, transportation assistance and funds essential needs for each family in its program. With the support of Truliant and other groups, Families Forward Charlotte is expanding to serve 20 additional families this year through its program.

Community Mini Grants

Applications for the Truliant Community Mini Grants program will open on May 1 and run through May 31. Eligible nonprofit organizations may apply for up to \$1,500 in programming or capacity-building funds to support their work. To learn more, please visit <https://www.truliantfcu.org/about-us/community/mini-grants>.

Truliant's Community Mini Grant program began in 2008. Since then, Truliant has awarded more than \$315,000 to nearly 300 organizations.

Examples of successful Community Mini Grants have included funds to:

- Distribute more backpack meals to children in food deserts,
- Purchase classroom supplies for teachers,
- Support mentoring programs for high school teens,
- Expand access to technology, and
- Deliver financial education lessons to young adults.

For questions about the Community Mini Grants, email community@truliantfcu.org.

Community Development

As a community leader, Truliant partners with organizations that cultivate relationships, social responsibility, civic engagement and collaboration through its focus on community development.

Truliant has supported initiatives, projects and improvements in Winston-Salem through its support of the **Downtown Winston-Salem Partnership** for more than 20 years. In February, Truliant continued its support with a corporate sponsorship of the organization's virtual annual meeting, which brings together downtown businesses, residents and organizations to celebrate growth and achievement in the downtown sector. Truliant's Chief Operating Officer, Anderson Langford, serves on the Downtown Winston-Salem Partnership Board of Directors. Langford offered welcoming remarks and introduced Winston-Salem Mayor Allen Joines during this year's broadcast.



Chief Operations Officer Anderson Langford welcomes the virtual audience for the Downtown Winston-Salem Partnership Annual Meeting in February.



Jessica Nilles (front row, second from the right) serves as president of the Mebane Business Association.

Truliant aims to strengthen nonprofit organizations by pairing staff leaders and their expertise with aligned community organizations through committee or board service. In Alamance County, Mebane Branch Manager Jessica Nilles serves as president of the **Mebane Business Association**, which works to organize community events and improve the lives of Mebane businesses and residents. The association annually organizes the Dogwood Festival and its 5K and golf tournament, one of Alamance County's largest outdoor events. In 2020, in response to the pandemic, the Mebane Business Association created a Small Business Relief Fund to support local Mebane businesses. Nilles said 15 small businesses received grants of \$500 to \$1,000 to help keep them open.

"We've had so many changes in the last year, and through my board service I have learned how to navigate challenges, both at work and with the association," Nilles said. "We've had to be creative and find different ways of doing things that we may not have tried before."

Nilles said she likes giving back to the community through her board service. "I like to build relationships with community partners to help solve problems because it is important to me to have those connections," she added. Nilles is also a member and past president of the Mebane Rotary Club, and she and her husband are foster parents.

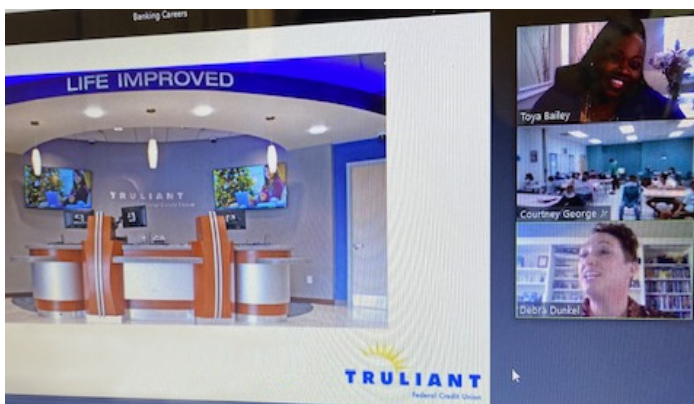
“ We’ve had to be creative and find different ways of doing things that we may not have tried before. ”

– Mebane Business Association

Youth & Education

Truliant supports nonprofit organizations in the area of Youth/Education that provide education and programming for middle and high school students.

This winter, Truliant presented financial education workshops to teens through our partnerships with **the Boys and Girls Clubs in Gastonia** and **Families First Community Services** in Charlotte. Teens in the Boys and Girls Clubs of Gastonia learned about financial services careers during an interactive workshop in February. Participants asked questions about experience, education and salaries during this program. Truliant presented the ABCs of Savings to children in the Families First Community Services program in February, which covers early concepts of personal finance including: Aim towards a goal; Bank your dollars in savings; and what to do with Coin/Currency.



Toya Bailey, Community Engagement Coordinator, and Debra Dunkel, Southern Regional Director, discussed careers in financial services with teens from the Boys and Girls Clubs in Gastonia.

This winter, the Truliant Foundation provided Charitable Grants to Charlotte nonprofits that mentor high school students through its focus on youth and education.

MeckED is an organization focused on supporting students in intergenerational poverty at Garinger, Harding University, Julius Chambers and West Charlotte high schools in Mecklenburg County. Truliant's funds supported MeckEd's Learning Lab, which provided a safe space for high school juniors and seniors to complete virtual schooling during the pandemic.

MeckEd

Latin American Coalition is expanding its GANAS program, which provided mentoring exclusively for Latino high school students. Truliant's funding will help LAC expand the GANAS program to freshmen, so that the mentoring experience will have greater benefit to more students. The Latin American Coalition mentoring programs are part of its Youth and Opportunity Center, which mentors and works with college-age students seeing employment.



Truliant also recently provided a charitable grant to **Communities in Schools High Point**, to encourage attendance at each of its eight inner-city elementary, middle and high schools in High Point. The program provides incentives and recognition for good attendance in the third and fourth quarters. According to Communities in Schools, studies show a link between attendance and graduation rates and improving job opportunities. This grant helps the schools address unexcused absences, which have been an obstacle this year.



Truliant collaborates with a number of local nonprofit organizations to deliver financial education workshops on a variety of topics including budgeting, credit and borrowing, careers in banking and stretching food dollars. For a complete list of financial education workshops or to learn how Truliant can present to your group, please contact community@truliantfcu.org.

Financial Wellness

Truliant supports organizations that are specifically engaged in activities that promote and improve financial inclusion and financial literacy.

The Truliant Foundation recently awarded **Financial Education Grants** to 11 educators to improve financial wellness and career development in local public schools. The grant program, now in its fifth year, supports public school teachers who want to incorporate personal finance and career development into their curricula.

Kim Roseboro is a Family Advocate at **Northridge Middle School** in Charlotte. Her “Hawk-preneurship Shark Tank Experience” will introduce 300 middle school students to entrepreneurship with lessons on marketing, finances and leadership development. “During what has been a challenging school year, we are excited to offer this special opportunity to our students,” Roseboro shared. “We know that teaching financial literacy and business development skills can spark an interest in academics as we connect their learning to their capability to earn income.”

In Virginia, teacher Christina Underwood was overwhelmed by the \$5,000 awarded to her and the **Pulaski County Career and Technical Education Center** for upgrades to its Cougar Store. The expansion of the store means students can purchase a mobile cart, accept debit/credit cards for school merchandise and research costs associated with adding new items to the store. “This grant improves the lives of my students by providing them with a real world lab experience of how to run a business,” Underwood said. “The students design and develop the products that are then sold to other students. It gives them working knowledge that they can apply in future employment opportunities. And, it gives us a chance to sell items in our rural community.”

Since 2016, the Truliant Foundation has awarded more than \$200,000 in Financial Education Grants to more than 50 educators.

The awards provided this year by the Truliant Foundation will impact more than 7,300 students, served by the following teachers and educators who are leaders in social studies, business, career development and computer science:

Doc Dillard, Business
South Mecklenburg High School
Charlotte, NC

Brian Harrison, Business
Ranson IB Middle School
Charlotte, NC

Anthony Kulpa, HVAC
Weaver Academy
Greensboro, NC

Rebecca McKnight, Social Studies
Winston-Salem/Forsyth Co. Schools
Winston-Salem, NC

Jacqueline Mingo, Business
Ben L. Smith High School
Greensboro, NC

Kim Roseboro, Family Advocate
Northridge Middle School
Charlotte, NC

Lohanna Sanchez, Computer Science
Northwest Guilford Middle School
Greensboro, NC

Lynne Temple, Business
Eastern Guilford High School
Gibsonville, NC

Courtney Tucker, Computer Science
Flat Rock Middle School
Winston-Salem, NC

Christina Underwood, Business
Pulaski Co. Career & Technical Education Center
Dublin, VA

Dale Watkins, Computer Science
High Point Central High School
High Point, NC



Recognition and Service

Each year, the **Carolinas Credit Union Foundation**, in partnership with the **National Credit Union Foundation**, honors credit unions across the Carolinas for exceptional work in the community. Awards are given in three categories, celebrating financial education, social responsibility and member service.

Truliant recently received a second place **Desjardins Adult Financial Education Award** for its Financial Education Grant program. Truliant also received a second place **Dora Maxwell Social Responsibility Award** for the credit union's People Helping People

campaign. Through the People Helping People initiative, Truliant purchased lunches from locally owned and operated restaurants to feed its frontline employees in 32 communities, and to feed hospital staff and local first responders in the Piedmont Triad and Charlotte. To date, Truliant has supported more than 300 locally owned restaurants since the pandemic began.



Investing in Communities

Truliant invests in local communities through a variety of programs, including:

Scholarships support high school seniors entering an accredited college, community college or university beginning fall semester annually.

Community Mini Grants fund programming and capacity-building initiatives for nonprofit organizations.

Financial Education Grants encourage public school teachers, grades 6-12, to incorporate financial education lessons in their curriculum.

Charitable Contributions offer timely gifts of support to nonprofit organizations throughout the year.

Community Sponsorships provide investment in local communities to support specific events, programs or date-specific opportunities or partnerships.

Employee Volunteerism allows staff to volunteer their time, talent and passion with schools or organizations of their choosing.

Board Involvement matches Truliant's leaders and expertise with local nonprofit organizations in an effort to strengthen nonprofit organizations.

Government Policy and Advocacy positions Truliant as a voice for our member communities and other credit unions in key policy and political activity.

Community Focus Areas

Truliant invests in local community programs supporting the following focus areas:

Community Development

Nonprofit and community organizations that cultivate relationships, social responsibility, civic engagement and collaboration that build community.

Economic Mobility

Nonprofit and community organizations providing personal guidance and activities that build financial stability and social prosperity for individuals and their families.

Financial Wellness

Nonprofit and community organizations that are specifically engaged in activities that promote and improve financial inclusion and financial literacy.

Youth & Education

Nonprofit and community organizations supporting education and programming from programming from middle school through high school.

Contributions and sponsorships are determined, in part, by how well a program or initiative aligns with one of our focus areas, and how well the program and its beneficiaries match the demographics of our membership base. This alignment is essential to making sound investments with funds entrusted to us by our member-owners.

About Truliant Federal Credit Union

Truliant's mission is to improve the lives of our members and become their preferred financial institution. To learn more about Truliant Federal Credit Union's community engagement program, or to apply for a grant, sponsorship or charitable contribution, please visit: <http://www.truliantfcu.org/about-us/community> or send an email to community@truliantfcu.org.

#trucommunity

