

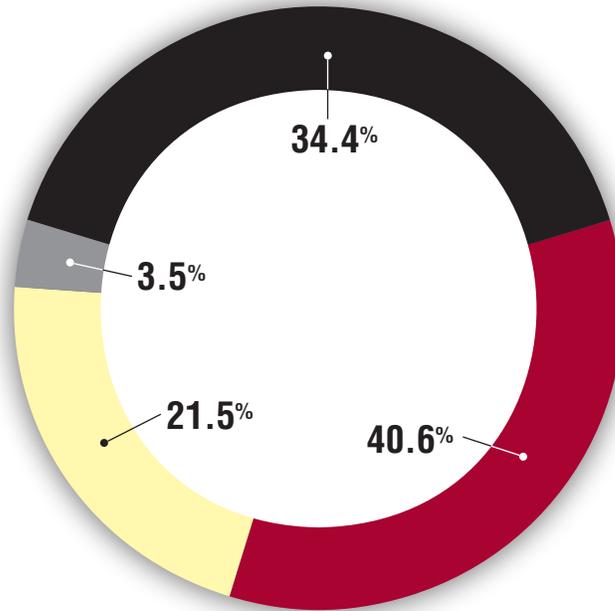
COMMUNITY IMPACT

GIVING BY PILLAR

Year-to-date giving total:

\$540,560

- Youth Development & Well-Being
\$219,415
- Family Health & Well-Being
\$186,359
- Civic Engagement
\$115,786
- Veteran Integration & Well-Being
\$19,000



Note: 60% of our 2021 community support giving has gone to organizations serving the underserved*

GIVING BY THE NUMBERS

Capital Region
\$490,966

Southern Tier
\$8,000

Western New York
\$6,195

Central New York
\$35,399

* SEFCU funding applications require organizations to disclose the percentage of funds requested that directly serve the underserved. Strong consideration for funding decisions was given to organizations with a diverse boards of directors and those that have implemented DEI policies.

ALL ABOUT HEART

Our Heart Walk efforts didn't skip a beat in 2021.

- **\$16,000+** generated from member in-branch donations
- **\$4,000+** raised from employee-sponsored fundraisers including Valentine's Day, May the 4th, and Mother's Day super raffles, Hoffman Car Wash, and the annual Cupcake Wars extravaganza again held virtually
- **\$49,154** was raised in total from all SEFCU Heart Walk fundraising efforts.

Usually held in February, our annual Heart Disc Donation Campaign was bumped to this spring! And, in only four weeks' time, SEFCU Retail teams had extra motivation to get all branch staff encouraged to engage members for donations. Any branch that had full participation to bring in at least one donation received a heart bonus.

VOLUNTEER IMPACT

Capital Regional Pharmacy Services, which has been administering vaccines across the region, operated a COVID-19 vaccine clinic in April and May at the SEFCU Corporate Center in Albany. More than 1,500 individuals were vaccinated with two doses, among the individuals were staff, their family members, and the general public. More than 60 staff also volunteered to help greet individuals being vaccinated and ensure a smooth experience for our guests.

- **4,181 volunteer hours** from 1/1/21 through 6/30/21
- **29 volunteer opportunities**
- YTD Financial Equivalent Contribution the Community: **\$130,823.49**



Changing lives every day.

January 1 – June 30, 2021

SHARE THE LOVE

To celebrate National Giving Hearts Day on February 11, we shared the love virtually with an exclusive Giving for Good vote! The efforts resulted in \$25,000 being deployed to 12 organizations serving the homeless across our regions.

Binghamton

Southern Tier Veterans Support Group (STVSG) - \$2,800
CHOW® (Community Hunger Outreach Warehouse) - \$2,100
YWCA Binghamton - \$1,200

Buffalo

Buffalo City Mission - \$3,100
Response to Love Center - \$1,500
Western New York Heroes - \$1,200

Capital Region

Joseph's House & Shelter - \$3,000
Albany Housing Coalition Veterans Housing Program and Services - \$2,800
Shelters of Saratoga - \$1,300

Syracuse

Samaritan Center - \$2,800
ClearPath for Veterans - \$1,900
Catholic Charities of Onondaga County Men's Shelter - \$1,300

GIVING FOR GOOD

Total YTD Donations in 2021: \$61,042.09
Employees: \$21,461.92
Members: \$37,735.67
Board: \$804
MobileCause® Donations: \$1,040.50
Total Contributors: 15,841

* MobileCause is our text to donate and online webform donation program that 85 donors have used to send their support to Giving for Good in 2021.

It's no coincidence that we celebrated Giving for Good on National Superhero Day, April 28, by thanking those who give and enrolling more staff and members to join us. In the weeks and months after, we were able to deploy nearly \$20,000 of basic needs items to shelters throughout our regions thanks to the generous participants of this program.

FREIGHT FARM

The second donated Freight Farm was deployed to a non-profit partner in February 2021 as part of our continuing social innovation strategy to attack hunger at its root. The City Mission of Schenectady farm arrived during the cold winter months but they are off and running, expecting their first full harvest of leafy greens in July to feed the individuals they serve. After the pandemic put a pause on the youth development training experience at the Boys & Girls Club Freight Farm, we are proud to announce kids are once again having a hands-on experience.

Total Heads Harvested: 10,939
Total Heads Donated: 10,939
Avg. Percentage Yield: 98%
Head Weight: 3.01 oz

WHY I CARE WINNERS

Q1 Award Recipients

Employee: Maggie Harrigan
Member: Tiffany Orner

Q2 Award Recipients

Employee: Andrea Johnson
Member: Shane Bargy

The 2021 employee and member award recipients certainly know how to step up before the pandemic hit and in an even bigger way when their respective communities needed them even more. Our winners are still celebrated virtually however we are planning a possible in-person celebration in 2021 to join with the 2020 recipients and congratulate all 16 winners together.

CHALLENGE COIN

April 2021 was National Volunteer Month, and although virtual, we still celebrated our 29 staff members who were named a 2020 top volunteer by logging 100 hours or more in YourCause. SEFCU President and CEO Michael Castellana joined a virtual breakfast and presented each top volunteer with his special challenge coin. Each volunteer got the chance to make a \$1,000 donation to the charity of their choice.



Coming Up Next

City Mission Farm First Crop
July 2021

Summer Needs Assessment
August 2021

Real Kids Wear Pink™
October 2021



INSTITUTE MISSION

The Institute for Financial Well-Being's mission is to guide and encourage individuals to focus on achieving economic stability — using innovative tools, making informed decisions, and encouraging positive habits.



Number of Events
228



Improvement in Confidence*
22%



Individuals Served
2,105



Hours of Education
456

* The total percent of change in participants' attitudes based on responses to questions before and after participating in financial education. Change in attitude not measured for 5-7 year olds.

EXPANDED VIRTUAL LEARNING

Did you know SEFCU currently offers more than 31 live, virtual, interactive webinars? The Institute for Financial Well-Being's team of educators have been hard at work expanding financial education topics to meet the needs of individuals of all ages. Sessions are always available to the public and offered at no cost. Register anytime at sefcu.com/financial-education.

MONEYEDU – POWERED BY SEFCU

SEFCU understands the need for individuals to access financial education at their own pace and at a time that fits their schedule. In April, the Institute for Financial Well-Being introduced MoneyEdu – powered by SEFCU. MoneyEdu is an online tool which features courses and articles that can be accessed on any device, anytime, anywhere. Courses cover a wide range of financial topics and feature videos, calculators, and other tools to reinforce learning and support financial goals!

FINANCIAL LITERACY MONTH

National Credit Union
Youth Savings Month

Throughout April, the Institute for Financial Well-Being celebrated National Financial Literacy Month. SEFCU members were invited to participate in a webinar challenge. Ten members were selected to win a \$50 cash deposit to their SEFCU account for attending a live, virtual webinar. Youth were also invited to build their confidence during National Credit Union Youth Savings Month by following one of the tips below:

- Attend a youth-focused financial webinar
- Make a save jar and begin adding funds to it at home
- Open a savings account and make deposits with their parent
- Read books about finances
- Create financial goals
- Play games that address financial concepts (i.e., Life[®], Monopoly[®], or other games/apps)

SERVING COMMUNITIES

In 2021, the Institute for Financial Well-Being has led 228 education sessions to 2,105 participants, in 34 different states! More than 70 business, schools and community organizations took advantage of the free online learning offered by SEFCU. The Institute is uniquely positioned to support all groups and the individuals they serve with education. To coordinate a learning opportunity, email us anytime at financialwellbeing@sefcu.com.

AFRICAN AMERICAN CREDIT UNION COALITION

SEFCU is a proud partner of the African American Credit Union Coalition (AACUC), supporting its mission to increase the strength of the global credit union community. The Institute for Financial Well-Being is thrilled to partner with the AACUC again this year, providing a live budgeting simulation to students attending this year's Commitment to Change conference. Planning is underway for this summer's event! The Institute is thrilled to continue collaborating with AACUC to deliver education to member credit unions through on line learning and a virtual train the trainer program.

THE NEW YORK STATE FOOD SUMMIT

The Institute for Financial Well-Being was a featured player at the New York State Food Summit in June, hosted by the Food Pantries for the Capital Region. Members of the Institute for Financial Well-Being managed a networking room throughout the day's events, sharing available opportunities for individuals and organizations to access financial education resources through SEFCU.

Coming Up Next

New, Interactive Virtual Webinars
Fall 2021

On-Demand Learning
Winter 2021

Youth Online Education Applications
2022