

2023

Impact Report

ENHANCING THE QUALITY
AND SUSTAINABILITY OF THE
COMMUNITIES WE SERVE



CU WEST
CARES
CHARITABLE FOUNDATION

CREDIT UNION
WEST

Message from the Foundation Board Chair

I am proud to introduce our first joint Community Impact Report from Credit Union West and the CU West CARES Charitable Foundation. This year marked an important milestone in our credit union’s charitable giving efforts with the official organization of the CU West CARES Foundation. Built from a passion to help our communities and members achieve a brighter future, the foundation was created to act in the true spirit of the credit union movement, “people helping people.”

As a 501(c)3 nonprofit, the foundation’s primary purpose is to serve local public interest needs through charitable work and giving. We aim to do this by raising and reinvesting funds into programs and initiatives that further our mission to enhance the quality and sustainability of our growing communities across Arizona. With the help of local nonprofits, grassroots organizations, and individuals, we believe we can make our home state a better place to live and thrive for all.

I would like to express my gratitude to our credit union members, community members, and credit union employees who graciously devoted their time and resources to support this vision. Our not-for-profit credit union is member-owned and member driven. This has allowed us to create impactful programs and grow our giving into a foundation that gives back to our communities and makes a difference in the lives of others.

“In 2023, our credit union and foundation supported more organizations than ever, totaling over \$121,000 in sponsorships and donations.”

In 2023, our credit union and foundation supported more organizations than ever, totaling over \$121,000 in sponsorships and donations. Nearly half of all Credit Union West employees provided over 500 volunteer hours of impact to our communities, equal to three months of full-time work. Our annual Scholarship Program also awarded the highest scholarship funds in recent years, totaling \$10,000 for college education.

Without you, none of these achievements would be possible. As a credit union member or foundation volunteer, you play a role in changing the lives around you by choosing Credit Union West and the CU West CARES Charitable Foundation. Thank you for your unwavering support.



A handwritten signature in black ink that reads "Karen Roch".

Karen Roch
BOARD CHAIR, CU WEST CARES CHARITABLE FOUNDATION
PRESIDENT AND CHIEF EXECUTIVE OFFICER, CREDIT UNION WEST

Our Mission

To enhance the quality and sustainability of our growing communities across Arizona.

Our Pillars

Our Foundation is built on four key pillars of support which guide our charitable giving.

- Community Heroes
- Distressed and Underserved Communities
- Education for All Ages
- Human Health and Wellness



BOARD OF DIRECTORS

The foundation is governed by a board of directors who are trusted leaders with a passion for supporting and improving our communities. The directors leverage a diverse set of experiences and a wealth of knowledge to guide the foundation's charitable contributions and community partnerships.



Karen Roch
CHAIR



Ryan O'Connor
VICE CHAIR



Kelly Poldoski
TREASURER



Jaime Burt
SECRETARY



Ning Duong
DIRECTOR

CU IN THE COMMUNITY

SPONSORSHIPS & DONATIONS



Credit Union West supported
53 sponsorships and donations for a total of

\$97,143

EMPLOYEE CARE



Employee contributions
from the EmployeesCARE
Program totaled

\$24,362

Together, the credit union and foundation gave

\$121,505 in 2023!

HOURS OF IMPACT IN OUR COMMUNITY

Credit Union West team members
provided a total of

**509 hours of impact
to our communities**



275 hours

of Volunteer Time Off



**73 team members
gave back** through our
VTO and STO programs



234 hours

of Sponsored Time Off

CELL PHONES FOR SOLDIERS

CU West members and
employees donated
462 phones in 2023
for a total of 7,545 phones
donated since 2010

SCHOLARSHIPS



Our annual Scholarship Program
awarded five high school seniors
\$2,000 each for their education
for a total of **\$10,000 in college
scholarships**

Community Impact and Engagement

Credit Union West has a decades-long history of serving its members, employees, and local communities. Originally located on Luke Air Force Base, our mission began to enhance the lives of our military members and their families as a trusted provider of financial services. Today, we embrace the same commitment throughout Arizona. We are passionate about helping you build a better future through financial health and stability. We do this by sponsoring community events, providing financial education, and offering programs that benefit the underserved, growing families, and local businesses.

The CU West CARES Charitable Foundation grew from these same fundamental principles. The foundation aims to support vital resources that strengthen our neighborhoods through charitable contributions and grants. This funding is given to organizations and individuals that enhance the quality of life for local community members. In 2023, the credit union and foundation supported a variety of initiatives, totaling 53 donations and sponsorships.



The Glendale Uniting Students Teachers and Others (GUSTO) Foundation GESE-OPOLY Fundraiser



The Foster Alliance (AZ Helping Hands)



Credit Union West Blood Drive with Vitalant



Glendale Chamber of Commerce Military Appreciation Event



Pendegast Elementary School District



Sounds of Autism



Mariah's Miracle



Dragonslayers Booster Club, Luke AFB



Packages from Home



OCJ Kids Holiday Gift Drive

Supported Initiatives

Community Heroes

- 19th Annual Pat's Run to benefit the Pat Tillman Foundation
- 24-hour vigil honoring POW/MIA soldiers hosted by the AFSA Chapter 1260 at Luke AFB
- Dragonslayers Booster Club at Luke AFB
- Fall Festival at Luke AFB
- Fighter Country Foundation Air Force Ball
- Fighter Country Foundation 14th Annual Golf Classic
- Freedom Festival Luke AFB 4th of July Celebration
- Glendale Chamber of Commerce Military and Veterans Affairs Committee (MVAC) Military Appreciation Ceremony
- Holiday Magic at Luke AFB
- Prescott Valley Chamber of Commerce Team Up to Clean Up event
- Prescott Valley Chamber of Commerce Veterans Appreciation Luncheon
- Soldier's Best Friend
- Southwest Valley Chamber of Commerce Golf Classic
- Veterans Medical Leadership Council

Education for All Ages

- Arizona Council for Economic Education (ACEE)
- Arizona West Point Parents Club
- Embry-Riddle Aeronautical University
- Glendale Chamber of Commerce Education Summit
- Glendale Community College Innovation Challenge
- Glendale Elementary School District Glendale Uniting Students, Teachers, and Others (GUSTO) Foundation
- Glendale High School Red Bird Exchange
- Junior Achievement of Arizona
- Pendergast Elementary School District Christmas event
- Verde Valley Fair Association
- WeSERVE Realtor VA Loan Education
- West-MEC Alliance

Human Health and Wellness

- Check for a Lump Breast Cancer
- Gift of Adoption Fund
- Lights of Hope for the American Cancer Society Cancer Action Network
- Mariah's Miracle
- Mesa Arts Center Foundation
- Phoenix Children's Foundation Ignite Hope Walk
- Sounds of Autism
- Western Sports Foundation
- WHAM Art Association (What's Happen'n Art Movement)
- Yavapai County YMCA Whiskey Row Marathon

Distressed and Underserved Communities

- ABC 15 "If You Give a Child a Book" Title I School Book Drive
- Arizona Foundation for Women
- Comfort Bears in a Catastrophe
- Firefighter Angel Foundation
- Fresh Start Women's Foundation
- Helping Hands for Single Moms
- HonorHealth Desert Mission Food Bank
- Jobs for Arizona's Graduates (JAG)
- Kiwanis Club of Glendale
- Mujer Inc. Youth Latina
- One Community Spirit Sponsorship
- Opportunity, Community, and Justice for Kids (OCJ) Good as Gold Gala
- Prescott Valley Chamber of Commerce International Women's Day Luncheon
- St. Mary's Food Bank
- The Foster Alliance (Arizona Helping Hands)
- Verde River Day
- Westside Recreation Program

EmployeesCARE Program

The EmployeesCARE Program privately raises money for non-profit organizations selected by our staff each year. The program is fully funded by the generosity of our credit union employees and historically benefits four organizations, annually. However, after the devastating Maui wildfires in August 2023, credit union employees organized an additional \$5,000 donation to the CUAid Credit Union Disaster Relief fund to help with the recovery efforts in that region.

For the second year in a row, credit union President and CEO, Karen Roch, increased the program's total giving by matching each donation with her own personal funds. In 2023, the EmployeesCARE Program gave over \$24,000 to the following non-profit organizations.

- Arizona Chapter of the American Foundation for Suicide Prevention
- Arizona Small Dog Rescue
- CUAid Credit Union Disaster Relief Fund to benefit Maui wildfire recovery
- Firefighter Angel Foundation
- Yavapai County Food Bank



Firefighter Angel Foundation



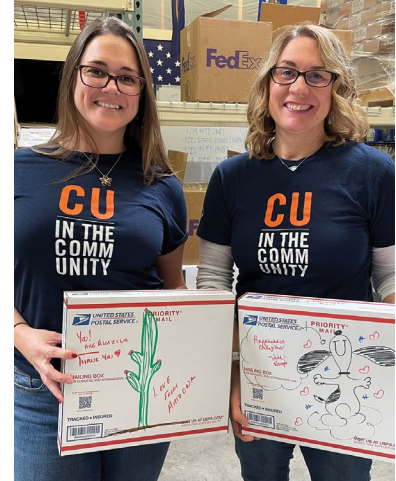
Arizona Small Dog Rescue



Yavapai County Food Bank



Jobs for Arizona's Graduates (JAG)



Packages from Home



Pat's Run benefiting the Pat Tillman Foundation



St. Mary's Food Bank

Employee Volunteer Program

Each year the credit union offers employees up to eight hours of volunteer time off (VTO) and unlimited sponsored time off (STO) to support our communities through service. Our employees provided over 500 VTO and STO hours that benefited more than a dozen local non-profits in 2023.

Notable Volunteer Events:

- 25th Annual Empty Bowls of Prescott
- Firefighter Angel Foundation
- Fighter Country Foundation
- Jobs for Arizona's Graduates (JAG)
- Junior Achievement of Arizona
- Opportunity Community and Justice for Kids (OCJ)
- Packages from Home
- Pat's Run
- Prescott Valley Chamber of Commerce Team Up to Clean Up
- Sounds of Autism
- St. Mary's Food Bank
- The Foster Alliance (Arizona Helping Hands)



Prescott Valley Chamber of Commerce Team Up to Clean Up



St. Mary's Food Bank



Cell Phones for Soldiers

Cell Phones for Soldiers

The Cell Phones for Soldiers Program provides cost-free communication services to active-duty military members and veterans through the collection and recycling of used phones and mobile devices. Each donated phone buys approximately one hour of free talk time for military members and veterans. Credit Union West members and employees donated 462 phones in 2023, bringing our total donations to 7,545 phones, equating to over 450,000 minutes of talk time since becoming an official drop-off location for the program in 2010.



Lindsay Carter



Jordyn Kulon



Cendy Nguyen



Briley Olson



Lucia Pease-Wingenter

Scholarship Program

We proudly provide community scholarships for local high school seniors each year. Our goal is to lessen the financial burden they face and help students establish strong financial futures as they pursue their educational goals. The five winners are chosen based on their academic achievement, involvement in the community, and overall character. The 2023 scholarship recipients exemplified a commitment to furthering their education and improving their communities. We are pleased to support their educational journey.

2023 Scholarship Program Award Recipients

- **Lindsay Carter**
Prescott High School
- **Jordyn Kulon**
Cactus High School, JROTC
- **Cendy Nguyen**
Washington High School
- **Briley Olson**
Prescott High School, JROTC
- **Lucia Pease-Wingenter**
Millennium High School

Financial Empowerment and Education

With support from the CU West CARES Charitable Foundation, Credit Union West employees proudly provided financial literacy resources and education courses to members and local communities. This free financial outreach program offers accessible financial education on various topics, including understanding a credit score, building a budget, vehicle buying tips, money management, and teaching youth about managing their finances.

In 2023, the credit union launched the CU@Work Program, a workplace benefit service that provides easy access to credit union membership at one's place of employment. The program features financial education training and resources to help equip employees with the tools they need to successfully manage their money and achieve their financial goals. Education topics cover banking basics, understanding your credit score and report, budgeting strategies, applying for your first mortgage, and retirement planning. Enrollment in the CU@Work program is free and increases the value of an employee's benefit package up to \$3,776.



Arizona Council on Economic Education Financial Fitness Workshop at Cactus High School



GCC Innovation Challenge Financial Success Workshop



Jobs for Arizona's Graduates (JAG) Arizona Pathway Makers Awards

Branch Locations

Arrowhead

20155 N. 67th Avenue
Glendale, AZ 85308

Avondale

503 W. Van Buren Street
Avondale, AZ 85323

Biltmore - Coming Soon!

5241 N. 16th Street, Suite 4
Phoenix, AZ 85016

Cactus

6777 W. Cactus Road
Peoria, AZ 85381

Corporate Center

10150 W. Desert River Boulevard
Glendale, AZ 85307

Cottonwood

1672 E. Cottonwood Street, Suite C
Cottonwood, AZ 86326

Kierland

14601 N. Scottsdale Road, Suite 115
Scottsdale, AZ 85254

Luke Air Force Base

13708 W. Glendale Avenue
Luke AFB, AZ 85307

Papago

2303 N. 44th Street, Suite 1
Phoenix, AZ 85008

Prescott

528 W. Gurley Street
Prescott, AZ 86301

Prescott Valley

3650 N. Glassford Hill Road
Prescott Valley, AZ 86314

Surprise

16765 N. Litchfield Road
Surprise, AZ 85374

Westgate

10150 W. Desert River Boulevard, Suite B-170
Glendale, AZ 85307

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cuwest.org | cuwestcares.org



The CU West CARES Charitable Foundation is an exempt organization as described in section 501(c)3 of the Internal Revenue Code.
EIN #92-0483609

Credit Union West is Federally Insured by NCUA.

