

# Potential

Improving Lives By Serving Credit Unions, Their Staff & Members



Issue No 43

Fall/Winter 2021

## PLEASE ROUTE:

- ☐ Board
- ☐ Lending
- ☐ Marketing
- ☐ Tellers
- ☐ \_\_\_\_\_

### \$12,000 Scholarship Offering Helps CUs Bond With Youth

The Foundation's annual scholarship offering helps credit unions bond with young members.



No cost, turn-key program now accepting your applicants...  
Page 2

### Wine Me Up Goes Hybrid; Sets All-Time Records

The popular event "went hybrid" for 2021 and produced record proceeds to support and enhance Foundation programs...

Page 3



### Friend Raisers Return With '22 Broadway Blockbuster

After taking time out due to pandemic restrictions, the popular Broadway fundraiser is back!

Page 3



## CU Association To Assume Foundation Management

*Agreement Retains Foundation Board Independence; Promises Program, Grant Expansion*



Kyle Swisher, has served as Executive Director of the Foundation since 2005, and will retire in May, 2022. He will be assisting in the management transition to ensure Foundation activities continue unabated.

The Credit Union Foundation MD|DC and the MD|DC Credit Union Association have jointly announced that they have entered into an Administrative Services Agreement that retains the Association to perform management services on behalf of the Foundation.

"We had the benefit of knowing that our Executive Director, Kyle Swisher, had announced his retirement date at the end of his current contract and there would be a need for management transition," said Foundation Chair, Ron Shockley. "An *ad hoc* committee was formed among our

Board members to evaluate the various paths available to us.

"After carefully considering all options, the committee recommended to the Board that we enter into discussions with the Association to see if they could assume management responsibilities upon Kyle's retirement, and the Board supported that approach."

"Negotiations between the organizations' Boards progressed well and swiftly resulted in a mutually-approved agreement," added MD|DC Credit Union Association President John Bratsakis. "We already work closely with the Foundation; we know each other extremely well and share values and missions. It made sense that the Association could provide management services and help move the Foundation's programs, grants, and fundraising capabilities forward."

Under the agreement, Mr. Bratsakis will assume the additional role of Foundation Executive Director, reporting to the Foundation Board in that capacity, and will assign Association staff as needed to manage various Foundation-related functions.

"Leigh Philibosian, who currently coordinates all of the Credit Union Miracle

Day activities including the annual Cherry Blossom Run and the gala, will perform essential Foundation duties," Bratsakis noted. "Because this has been a carefully considered transition, Leigh and Kyle will have ample time to coordinate the 'hand-off' to ensure uninterrupted programs and activities."

"Since the Foundation's inception, its Board has been comprised of talented Directors who have made smart decisions," said Foundation Executive Director Kyle Swisher. "Faced with the challenge of navigating a management transition, it comes as no surprise that they arrived at this decision."

"Retaining the Foundation Board's vision and governance expertise while tapping the remarkable, diverse pool of talent available among the Association's staff will produce better programs to help local credit unions and a more effective reach for development activities that fuel those programs."

"After a lifetime of leading nonprofit organizations, I'm looking forward to retirement, and with this arrangement in place I feel I can move on with full confidence that this Foundation will continue to grow and flourish," Swisher added.

## Congratulations 2021 Scholarship Winners! \$12,000 Awarded!



(Not All Winners Shown)

Winning essays, video & photo at [CUFound.Org/Scholarship](http://CUFound.Org/Scholarship)

## 2022 Scholarship Program Builds Young-Member Relationships; Encouraging Participation Benefits Credit Unions' Outreach Image

The Foundation's 2022, \$12,000 Credit Union Scholarship Program is now accepting applications.

College and trade school bound members may apply in three distinct categories: essay, photo and video.

College or trade school-bound members of any credit union based in Maryland or D.C. or affiliated with the MD|DC CUA are eligible. The scholarship program is completely turnkey and offered at no charge.

"The scholarship program is a cost-free way for credit unions to reach out to their young members," noted Foundation Executive Director Kyle Swisher. "Every credit union should promote this free program and use it to help bond with young members."



The 2022 essay assignment is: "In life, things can happen fast. Describe a sudden change in your life, real or imagined, that

presented a financial challenge and describe how your credit union helped you get through it."

Photographers are invited to capture an original photograph that represents the theme, "Respect."

This year's video topic is: "You're suddenly confronted with an unexpected financial challenge. Create a 60-second video depicting the challenge and how your credit union helped you successfully handle it."

The Foundation provides:

- \$12,000 in scholarship awards
- An easy online application site
- Lobby posters
- Scholarship graphics
- Statement stuffer artwork
- Sample newsletter/web copy
- 100+ volunteer judges

**Complete Scholarship Support Kit**  
[CUFound.Org/CUScholarship](http://CUFound.Org/CUScholarship)

After the March 31, 2022 deadline, credit unions with member applicants receive a report on all members who entered and their standing. "Often, credit unions reward members who apply by providing gift cards or a letter of support, even if they don't place among the top contenders," added Swisher. "It's a remarkable turnkey

program. Our wonderful volunteer judges perform the scoring, the Foundation provides the scholarship funds, and credit union members reap the benefits!"

### You Be The Judge!



Ten or Fewer Essays  
To Read & Score

- ✓ Entire rating process conveniently online
- ✓ All scoring instructions & tools provided
- ✓ Help credit union members earn scholarships!

Sign Up Now:

[CUFound.Org/Judge](http://CUFound.Org/Judge)



## "Wine Me Up" Sets All-Time Records

### Popular Annual Event Takes On A "Hybrid" Approach For 2021

Last year, as the COVID-19 pandemic began taking its toll on organized events, the Foundation's Advancement Committee had to confront the impact on their ever-popular wine pull event, *Wine Me Up*. In response, they got innovative and created the first known virtual wine pull site and were greeted with record proceeds. But that record only stood for one year.

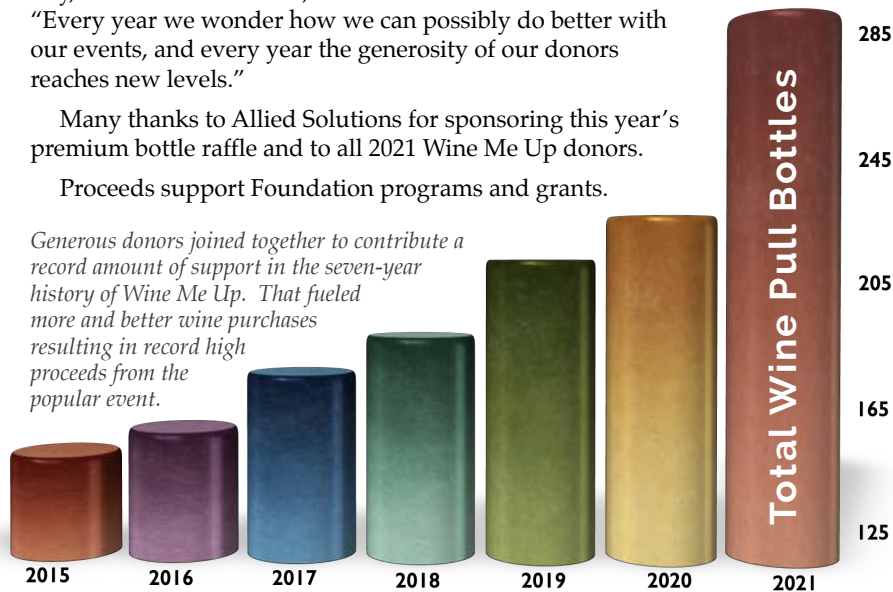
As restrictions on gatherings lifted and the MD|DC Credit Union Association once again hosted an in-person annual convention, the Advancement Committee committed to a hybrid approach of both in-person and virtual wine pulls - and the result was the most successful event in its seven-year history.

"We are so grateful to have earned the support of our credit union community," said Linda Albrecht, Advancement Committee Chair. "Every year we wonder how we can possibly do better with our events, and every year the generosity of our donors reaches new levels."

Many thanks to Allied Solutions for sponsoring this year's premium bottle raffle and to all 2021 Wine Me Up donors.

Proceeds support Foundation programs and grants.

*Generous donors joined together to contribute a record amount of support in the seven-year history of Wine Me Up. That fueled more and better wine purchases resulting in record high proceeds from the popular event.*



## Thank You, Wine Me Up Donors!

100 Pt. Donors	95 Pt. Donors	90 Pt. Donors
Linda Albrecht	Joseph Amellio	John Bratsakis
Ron Baron	Steve Cimino	Margaret Burdette
Miguel Boluda	Christie Clark	Paul Butler
David Brehmer	Sean Connell	Michelle Byrnie-Parker
Bob Brenneman	Carla Decker	Eric Church
Rosser Campbell	Barry Decker	Rosalyn Coates
Kevin Contardi	Mark Ely	Debbie Connors
Bryn Conway	Rod Flowers	Sarah Cooke
Robert Duff	Patricia Folk	Laura Eacho
Derek Fuzzell	Stephen Harrell	Regina English
Bonnie Jacobson	Bert & Joan Hash	Jeff Goff
Scott Patterson	Marsha King	Adrian Johnson
Nick Prevas	Laurie Maddalena	André Lucas
Ron Shockley	Norman Mann	Thelma Matthews
Kirsten Williams	Brenda Minnich	Mike Mohny
Will Yarborough	Joan Moran	Kelly Mosher
	MJ Neusaenger	Janis Motichka
	Janet Oursler	Jim Norris
	Karen Rosales	Leigh Philibosian
	Richard Stafford	Lois Profili
	Jo Ann Talbot	Bill Rayman
	Matt Trendell	Bob Schroeder
	Donald Tynes	Kristin Schulz
	David Woodruff	Karen Stansbury
		Karen Stiltner
		Kyle Swisher
		Matt Thompson
		Joan Tisdale
		François Verleysen
		Jim Whipp
		Michelle Williams

**Raffle Sponsor**  
**Allied Solutions**

## Foundation Announces 2022 Friend-Raiser; Broadway Production of "Ain't Too Proud"

*Musical Follows The Life and Times of The Temptations*

After a year off due to pandemic restrictions, the Foundation is excited to return to their traditional "Friend-Raising" events in 2022.

On Thursday evening, May 5, 2022, at the Hippodrome Theater in Baltimore, the Foundation will present, "*Ain't Too Proud*," the Broadway musical that follows The Temptations' extraordinary journey from the streets of Detroit to the Rock and Roll Hall of Fame.

The Foundation event includes a gourmet pre-show reception.

A story of brotherhood, family, loyalty, and betrayal, "*Ain't Too Proud*" is set to the beat of the groups treasured hits including

"My Girl," "Just My Imagination," "Get Ready," "Papa Was A Rolling Stone," and more.



Directed by two-time Tony Award winner Des McAnuff (*Jersey Boys*) with choreography by Tony Award winner

Sergio Trujillo (*Jersey Boys*, *On Your Feet*).

Complete details, sponsorship opportunities and individual ticket sales are available at [cufound.org/events](http://cufound.org/events).

## Board of Directors

Ron Shockley, Chair  
Chris Conway, Vice Chair  
Sean Zimmermann, Treasurer  
Linda Albrecht, Secretary

Roderic Flowers  
Bonnie Jacobson  
Adrian Johnson  
Jim Whipp  
Beverly Zook



## Contact

Kyle Swisher, Executive Director  
443 325-0771  
CU Foundation MD|DC  
8975 Guilford Road STE 190  
Columbia, MD 21046-2386  
[CUFound.Org](http://CUFound.Org) • [Info@CUFound.Org](mailto:Info@CUFound.Org)

If you would like to receive *Potential* as an email you can view on screen and print for yourself, or to be removed from our mailing list, please let us know. The CU Foundation MD|DC is a 501 (C) (3) public charity.





Carla Decker, CEO, DC Credit Union, was the lucky winner of the Foundation's Wine Me Up raffle, taking home four premium bottles valued at over \$750!

See full story on the event, page 3.

NonProfit  
US Postage  
PAID  
Capitol Heights MD  
#2151



## Improving Lives By Helping Credit Unions Better Serve Their Members & Communities

<i>Annual Appeal</i>	Chairman's Club	Leadership Circle	Benefactor	Donor
Credit Unions As a % of Assets*	.0025% (Minimum: \$300)	.001% to .0024% (Minimum: \$200)	.0002% to .001% (Minimum: \$100)	<.0002%
Businesses & Organizations	\$1,000+	\$750 - \$999	\$500 - \$749	Up to \$500
Individuals	\$300+	\$200 - \$299	\$100 - \$199	Up to \$100

\*Use the on-line Recognition Calculator at [cufound.org/donate](http://cufound.org/donate) to easily calculate credit union donor recognition levels.

***I am proud to be a supporter of the Credit Union Foundation MD|DC!***

Enclosed is my deductible donation of \$ \_\_\_\_\_

Friend of the Foundation: (Address correction requested)

Apply my gift:

- ☐ Where The Need Is Greatest
- ☐ Endowment Fund
- ☐ Training Grants
- ☐ Small Credit Union Support
- ☐ Financial Literacy

*The Credit Union Foundation MD|DC  
Is a 501 (C) (3) Public Charity  
Donations Are Tax-Deductible as Allowed by Law*