



COUNTY FEDERAL

SANTA CLARA COUNTY FEDERAL CREDIT UNION

2022 Community Impact Report



COUNTY FEDERAL

CARES

At **County Federal**, we believe in our Core Purpose: "Bettering the lives of those who serve the public." This drives everything we do. As team members, we care about helping our members to achieve their financial goals and enhance their quality of life. As fellow parents, neighbors, and friends, we believe in giving back to the communities in which we live and work.

In response to our new normal, we continued to change and adapt. We have strengthened our partnerships, evolved current initiatives, and discovered new ways to positively impact our community. And, we continue to see our impact grow year over year.

We are proud to share our 2022 Community Impact Report, which reviews our community engagement, advocacy, and giving.

Serving Members & Local Community Since 1950



**Over \$64k
Donated**



**2,800+ Hours
Volunteered**



Our Approach to Community Impact

As a low-income designated credit union, we are uniquely positioned to positively impact the communities in which we live and work.

Our volunteer and give-back efforts are focused on the following:



Children & Education

When there is economic stability, we see the connection between the student and local teacher's success in the pursuit of learning.



Community Health & Well Being

We support community needs such as food insecurity, mental health, and emergency relief. We partner with local organizations to provide needed services and community building.



Financial Wellness & Inclusion

We aspire to advance financial wellness and inclusion by providing access to useful and affordable financial products and services, financial literacy programs, webinars and more.



Team Passion & Cultivating the Volunteer Spirit

Our team is supported and encouraged to pursue giving back to the organizations that they are passionate about.



Children & Education

Starting the school year with a brand-new backpack is something we all remember and cherish. That's why we partner with The Family Giving Tree to fundraise for their Annual Backpack Drive, which benefits families that may not have the means to afford basic school supplies. Through this program, local students are provided with a brand-new backpack with supplies that aid in STEAM learning. The benefits go beyond physical items – students experience healthy self-esteem, focus, and better learning outcomes, and parents and teachers feel supported by the community. And, this year, we extended this support by offering our M3 Money Club Members additional school supplies to start off 2023.

For students pursuing post-secondary education, student debt is a reality. To support these scholars, County Federal awards scholarships to graduating high school seniors, and students enrolled in an accredited university or community/technical college.

Finally, without exceptional teachers, our community would be missing something essential. We provide Santa Clara County classrooms with STEAM kits and access to the financial literacy curriculum that can be used in class. And, for the past 27 years, we have sponsored and supported the Santa Clara County Office of Education, Annual Teacher Recognition Celebration.

SANTA CLARA COUNTY
OFFICE OF EDUCATION



TEACHER RECOGNITION CELEBRATION

**27 Year
Sponsor of the
Teacher
Recognition
Celebration**



2022 Scholarship Recipients



Benjamin Noah Ebalobo



Sargun Dhillon



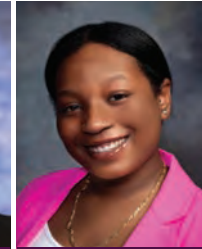
Jocelyn Possley



Nathalia Villaseñor-Carrillo



Vicente M. Gonzales



Ciara Monet Hill



Natalie Hulme



Diana Frias Franco



Ariel Pham



EDUCATIONAL
SCHOLARSHIPS

**Over
\$9,000
Awarded**

“ It excites me to know that the younger generations not only have the knowledge to address critical issues facing our world today but also have the heart to want to do something about it. **-Bebe**

**\$12,500 Raised For
School Supplies & Backpacks**



BACK-TO-SCHOOL
BACKPACK DRIVE

“ I volunteer [Back-to-School Backpack Drive] because I want my kids to see what it is to help others and to make them into helpful, kind, caring, and loving people. We never know when we will need assistance, and it feels good to give back. “Do good, and good will come to you.” **-Jessica**



Community Health & Well Being

We recognize our duty to lend a hand and create positive change in the community. That's why we partner with organizations aiming to tackle issues like food insecurity, mental health support, and more! Plus, through various events hosted by us—we get out there on a mission of bringing people together for meaningful connection.

Addressing Food Insecurity

Record high food costs and the financial strain caused by the pandemic have increased the need for food assistance in our communities. We believe everyone should have access to healthy food. We partner with organizations like The Health Trust -The Jerry Larson FOODBasket to pack grocery bags, sort food items, and collect canned goods to be distributed to our homebound neighbors and adults with disabilities and medical needs. In addition, we also provide notes of kindness and warmth through our monthly letter-writing program, which are included in grocery bag distributions.

Shred Day

With consumer fraud and identity theft on the rise, we want to help our members safeguard their information. Every year, we host Shred Day - a popular drive-thru event where members can bring their personal or business documents to be shredded and recycled responsibly for free.

Teddy Bears on Patrol

County Federal's Teddy Bears on Patrol has kept kids safe and comforted with thousands of cuddly pals for over twenty years! Through partnerships with law enforcement agencies, schools, and local charities - these furry friends make sure nobody is ever alone in times of distress.

“Teddy Bears on Patrol has been a very successful fundraiser for the credit union. I was amazed at the response from our members when asked to donate. I'm proud of the effort everybody put in and the support we got to make this a success. -Jun



 600
Teddy Bears Donated



over 7 tons
of paper shredded & recycled



2,900 cans & food
items collected

“Having SCCFCU as a partner has been beneficial in ensuring we can continue to provide services to the Santa Clara County community.
-Stefany, Community Partnerships Manager, The Health Trust



600 uplifting
letters written



Financial Education Highlights

- Over 800 registrants have attended our monthly webinars, covering topics from how to manage your finances to how to apply for a loan
- 50+ Tips & Articles on Fraud Awareness Published
- 24+ Financial Education Articles Published
- 160+ Students Utilizing Sponsored Educational Programs

Financial Wellness & Inclusion

As a local credit union, one of our objectives is to ensure that everyone has an equal opportunity to generate greater wealth, which in turn, creates stronger communities. By providing affordable financial products and services, financial education, and emergency loan services, we are here to help make a positive difference in our members' lives.

Financial Education

Knowledge is power. Having a strong foundation of financial literacy opens the door to planning for future goals, understanding financial products, and preventing fraud. We provide free monthly webinars and access to online educational programs as well as onsite educational presentations at our partner sites.

Access to Financial Planning Services

Through our partnership with Priority Financial Group (PFG) and Securities America, Inc., County Federal provides access to Wealth Management Services, designed to help our members meet their financial goals. This is a value-added service that allows members to explore investing strategies and gain insights through Wealth Management Advisors. Members can get objective financial advice on saving for education, building an investment portfolio, and help to create a financial plan that evolves with their needs.

Securities offered through Securities America, Inc., Member FINRA/SIPC. Financial Advice & Investment Advisory Services offered through PFG Advisors, a Registered Investment Advisor (RIA). PFG, PFG Advisors, Santa Clara County Federal Credit Union, County Federal Wealth Management, and Securities America, Inc. are separate entities.

Not NCUA Insured | No Credit Union Guarantee | May Lose Value



Team Passion & Cultivating the Volunteer Spirit

At County Federal, one of our values is Service and Cultivating the Volunteer Spirit. Our team is passionate about making a difference in their communities by giving back from helping to maintain park trails to supporting the animal shelter. Each year, we continue to grow our volunteer spirit and the number of diverse organizations that our team supports.

“ I volunteer because I want to make a difference in the lives of others. Everyone has their own journey, and you never know what others are going through so anything I can do to help enrich the lives of others is worth any amount of my time.
 -Diane

“ I wouldn't be here except for the charity of others. I was raised on welfare, I was homeless in high school, I was in foster care. I owe a great debt for the life I've been given.
 -Jack

“ The amount of support within my team and from members has made me feel confident that every little contribution makes a significant difference towards a goal, and for that, I'm proud.
 -Kerissa

“ My favorite inspiring quote from Toni Morrison, “If you are free, you need to free somebody else. If you have some power, then your job is to empower somebody else.”
 -Karen

“ Now that I am in a place where I can give back, I take advantage of opportunities to support my local community who had previously supported my family.
 -Jaclyn

Our Team Supports These Organizations

- AAU Morgan Hill Basketball
- AIF
- Alameda County Library Foundation
- American Red Cross
- ANULife
- ASPCA
- Assyrian Food Festival
- Boy Scouts Troop 611
- Boys Town
- Breathe California
- Cal State East Bay
- CGS Lutheran Church
- Children of Grace
- City Team San Jose/Silicon Valley
- Community Homeless Solutions
- Delta Phi Epsilon
- Disabled American Veterans
- Doctors Without Borders
- Donation to Ukraine through Safeway
- East Bay SPCA
- East Side Union High School District Education Foundation
- Eisenhower Elementary School
- Five Wounds Church
- Freedom Fest
- Humane Society
- International Rescue Committee
- Jai Lao Foundation
- Lotus Preschool
- Lupus Foundation
- Mercy Warehouse
- Michael J. Fox Foundation for Parkinson's Research
- Mini Cat Town
- Morgan Hill Pony Baseball
- NAMIWalks Your Way Silicon Valley
- National Coalition of 100 Black Women
- Nova Ukraine
- One Tree Planted
- Piedmont Middle School
- POSSO
- Prison Fellowship
- YMCA Project Cornerstone
- Quicksilver Running Club
- Rebekah Children's Services
- Recovery Cafe San Jose
- Ronald McDonald House
- Synergy Foundation
- Saakshi Yoga
- St. Jude Children's Research Hospital
- Saint Margaret Mary School
- Salvation Army
- San Jose Buddhist Church Betsuin
- San Jose Public Library
- Santa Clara Police Activities League
- Second Harvest Food Bank
- Silicon Valley Humane Society
- Stanford Blood Center
- Stop AAPI Hate
- The Rock Church
- UNICEF
- University of Georgia
- Vibha
- Vinci Park Elementary School
- W. Contra Costa School District
- Warm Springs Little League
- Wat Lao Buddhaxinaram
- Wheels for Wishes
- World Central Kitchen

60+
Organizations Supported





COUNTY FEDERAL

SANTA CLARA COUNTY FEDERAL CREDIT UNION

Branch Locations & Hours

Almaden Branch

5353 Almaden Expressway,
Suite 65
San Jose, CA 95118
Monday - Friday 9 am - 5 pm
Saturday - 9:30 am - 2 pm

Campbell Branch Kirkwood Plaza

1638 W. Campbell Avenue
Campbell, CA 95008
Monday - Friday 9 am - 5 pm
Saturday Closed

East San Jose Branch

255 N. White Road, Suite 112
San Jose, CA 95127
Monday - Friday 9 am - 5 pm
Saturday - 9:30 am - 2 pm

Gilroy Branch

6915 Camino Arroyo, Suite 50
Gilroy, CA 95020
Monday - Friday 9 am - 5 pm
Saturday Closed

West Hedding Branch

70 West Hedding Street
(Lower Level)
San Jose, CA 95110
Monday - Friday 9 am - 5 pm
Saturday Closed

Corporate Center Mailing Address

P.O. Box 11024
San Jose, CA 95103

City Centre Office

(No Branch Services)
140 E. San Fernando Street
San Jose, CA 95112

Mortgage Lending

Monday - Friday 9 am - 6 pm
Saturday Closed
408-282-0700/408-282-0742

Consumer Lending

Monday - Friday 9 am - 5 pm
Saturday - 9:30 am - 2 pm
408-282-0700/800-282-6212

Contact Center

Monday - Friday 8 am - 6 pm
Saturday - 9:30 am - 2:30 pm
408-282-0700/800-282-6212

Board of Directors & Executive Leadership Team

EXECUTIVE LEADERSHIP

Rebecca Reynolds Lytle
President & Chief Executive Officer

Joe Bonacci
Senior Vice President & Chief Information Officer

Divine David
Senior Vice President & Chief Experience Officer

Trent McIlhaney
Senior Vice President & Chief Financial Officer

Jennifer Montero
Senior Vice President & Chief Human Resources Officer

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Vice Chair

David Indra
Secretary & Treasurer

Deborah Baker
Director

Dave Cameron
Director

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Member

John Tran
Member

David Indra
Board Liaison

