

Application: 22485

Workers Kindness

<b>Page: Applicant Information</b>
<b>Credit Union</b> Workers Credit Union
<b>Project Title</b> Workers Kindness
<b>Category</b> More than \$1 billion in assets
<b>First Name</b> Maria
<b>Last Name</b> McCaffrey
<b>Email Address</b> mmccaffrey@wcu.com
<b>Credit Union Address</b> 119 Russell Street Littleton, MA 01460
<b>Page: Dora Maxwell Program</b>
<b><u>The Dora Maxwell Social Responsibility Community Service Award</u></b> The Dora Maxwell Social Responsibility Community Service Award is given to a credit union or chapter/multiple credit union group for its social responsibility projects within the community. The award is given for external activities. As you work on your submission you will see varying formats in which questions will be answered. Some will require only numbers, while others will require much more time and thought. You are able to save and come back at any time (until you submit). Things to Remember: <ul style="list-style-type: none"><li>• Most text boxes do not have character limits and you are able to format as you wish (bolding, italics, underlining, bullets...).</li><li>• You are able to skip questions that are required, but you will need to go back and answer them before you submit your project. (If you do not have anything for a question, please insert n/a in the text box provided.)</li><li>• Please include any documentation and promotional material you wish. We look forward to seeing your projects in electronic format (videos, audio, Facebook, Twitter, news articles...).</li></ul>
<b>Page: Credit Union Information</b>
<b>Credit Union's Field of Membership</b> Multiple Group
<b>City &amp; State Location</b> Littleton, MA
<b>How many members does your credit union have?</b> 120000
<b>How many employees does your credit union have?</b> 343
<b>Is your credit union a member of CUNA?</b> Yes

**Page: Project Submission Form**

The Dora Maxwell Social Responsibility Community Service Award recognizes a credit union or chapter/multiple credit union group for its social responsibility and charitable project's that support its community.

Below are a series of questions about your project. There is also a place in the last page of this application to attach applicable documents and weblinks. Feel free to refer to these attachments in your answers here.

**In 150 words or less, please give a high-level overview of your submission.**

In May 2022, Workers launched a new program called "Workers Kindness," which gives members a voice in directing a portion of Workers Credit Union's charitable giving. Members are surveyed quarterly about which of four nonprofit organizations the credit union should support, and which nonprofits should be included on the list the next quarter. Funds are allocated to those organizations in proportion to the votes they receive.

**Why does this project best represent the cooperative principle of concern for community?**

Since Workers Credit Union's founding in the early 1900s, the credit union has existed to serve members. More than a hundred years later, not only does Workers Credit Union remain dedicated to uplifting the community through its Workers Way financial wellness program, but also by giving philanthropically. Last year, Workers Credit Union donated more than \$440,000 to 205 charitable organizations. In alignment with the credit union's commitment to be member-driven, in May of 2022, Workers Credit Union launched a new program called "Workers Kindness," which gives its members a voice in how some of those funds are allocated each quarter.

"Philanthropic giving is directly tied to building financially strong communities," said Doug Petersen, President and CEO of Workers Credit Union. "Workers Kindness is a tool they can use to positively impact the places where they live and work. It is their opportunity to improve their communities."

In the launch of Workers Kindness, members were asked to vote by filling out a survey link from a slate of five pre-selected charities and to nominate organizations for inclusion on future ballots. Members had an opportunity to cast three votes per ballot. The pilot was a great success. Five thousand members voted on how to allocate \$25,000 worth of philanthropic funds. As a result, Big Brothers Big Sisters of Central MA, Gardner Community Action Committee, Habitat for Humanity of Greater Lowell, Making Opportunity Count, and Second Chance Animal Services all received donations proportional to the votes they received. Since then, Workers Kindness has become a quarterly member engagement and philanthropic event.

In the second Workers Kindness survey, all five charities on the ballot were nominated by members who responded to the May ballot. This time, we again saw more than 5,000 members votes for causes ranging from youth enrichment to animal services, to homelessness. The organizations on the next quarterly ballot will be determined by the members. The organizations that get the most nominating votes in the previous quarter's survey will be the ones that appear on the ballot the next quarter.

In the third Workers Kindness survey, four charities were on the ballot, all were nominated by members who responded in the last survey, which took place in the fall. More than 5,500 votes for causes ranging from suicide prevention to veteran outreach.

In the most recent Workers Kindness survey in March 2023, four charities were on the ballot, all were again nominated by members who responded in the last survey, which took place in early March. More than 5,000 votes for causes ranging from mental health services to financial support of children with health issues. Moving forward, organizations will continue to receive funds as a result of member nominations and votes.

Workers Kindness has allowed members to expand the credit union's understanding of the organizations in the community. They have introduced Workers Credit Union to organizations it hadn't been aware of and validated its commitment to others the credit union has supported in the past.

The program has received recognition in several media outlets including *Banker & Tradesman*, *WICN*, *Groton Herald*, *Leominster Champion*, (<https://www.leominsterchamp.com/2022/06/13/workers-credit-union-launches-workers-kindness-donation-program/>) *WCRN* (<https://soundcloud.com/worcesterchamber/doug-peterson-ceo-workers-cu06-08-22>), and the *Lowell Sun* (<https://www.lowellsun.com/2022/05/23/the-five-minute-read-485/>).

**How many employees were involved in implementing this project?**

Workers Credit Union's marketing team of six people was directly involved on the project – strategizing and planning for the project, executing through written copy, designing materials, and promoting the message on all communication channels (email, social media, traditional media, etc.). Additionally, Workers Credit Union's entire team of 330 individuals were involved indirectly and encouraged members to participate.

**Who participated in this project? How did you balance paid/volunteer time for your employees as you completed this project?**

The beauty of Workers Kindness is that it put members in the driving seat of the credit union's giving and philanthropy. Workers Kindness ensured that the credit union's philanthropy was giving in alignment with the community's needs and priorities. No additional volunteer time was required on behalf of Workers Credit Union staff to complete this project.

**Has your credit union submitted this project before?**

No

**If yes, what changes have been made to distinguish this entry from previous submissions?**

**Please list any additional community service projects your credit union was involved in.**

Since 1914, Workers Credit Union has been dedicated to supporting the communities it serves. Over the years, the credit union has grown in its reputation as a valuable contributor across cities and towns throughout Massachusetts. As an integral part of the community, Workers Credit Union is proud to provide support in a variety of ways.

*General Giving*

Each year, Workers budgets approximately \$400,000 to charitable giving. Donations range from \$125-\$20,000 to support social services, food banks, museums, and children's educational programming among others.

*Planned Giving*

In addition to general giving, each year, Workers pledges various donations to support large community impact projects. Typically, these projects are related to capital campaigns or building construction/ renovation. Currently, Workers is supporting the following:

- o Health Alliance - \$100,000 over 5 years (last payment this year)
- o YWCA Central Massachusetts - \$50,000 over 5 years
- o Boys & Girls Club of Greater Lowell - \$50,000 over 5 years
- o Heywood Hospital Surgical Pavilion - \$25,000 over 5 years
- o North Star Family Services - \$25,000 over 5 years (new this year)

*Branch Drives*

In August, each of Workers Credit Union's 17 locations participated in a member-driven school supply drive. A school in each of the towns the credit union serves was selected for support and branches collected supplies from pencils and highlighters to notebooks and cleaning supplies. The credit union anticipates that this will be a yearly event and will include other branch drives throughout the year.

*WooSox Partnership*

Each year, Workers Credit Union partners with the CUA to sponsor the Worcester Red Sox. Through this partnership, the credit union receives more than 300 tickets to games at Polar Park. While Workers Credit Union uses some tickets for employee events or networking, it is still left with a large number of tickets. In 2021, Workers Credit Union began utilizing these tickets with its community partner, The Boys and Girls Club of Worcester. This offering allowed children of Worcester who may not otherwise be able to attend a game in their hometown the ability to do so. Each year, 100 members of the Club are able to attend a game and Workers Credit Union plans to continue doing this for the life of the partnership.

*Employee Impact*

At Workers, giving is also a big part of our employee culture, with employees generously donating both time and money to various causes such as Habitat for Humanity and other organizations around central and northern Massachusetts.

Employee volunteerism is encouraged and rewarded with additional paid time off and quarterly raffles. In 2022, employees completed 729 hours of volunteering. While this is down from years past due to continued pandemic fears, the credit union has seen a recent uptick in volunteerism and availability of events in the last few months.

Employees support the United Way via the credit union's annual payroll pledge campaign. In 2022, employees have pledged more than \$47,000 which is matched by corporate donations, totaling \$94,000.

Employees also run various fundraisers throughout the year to support local charities. Workers Credit Union's team of employees supporting the Greater Gardner Relay for Life raised \$20,000 in 2022.

*Giving Roadmap*

In 2022, Workers was named one of Massachusetts' Top Charitable Contributors by the Boston Business Journal for our 2021 charitable giving which surpassed \$420,000.

Workers also received a CUNA Diamond Award, a prestigious credit union marketing award, for its work on the annual Feel Good campaign which encouraged behavioral change in members in exchange for a donation to a local food bank. Workers donated more than \$50,000 in two years on behalf of members.

**Page: Project Information**

**What were the specific, measurable goals of your project?**

The objective of Workers Kindness was:

- To make a positive impact on the 17 communities Workers Credit Union serves
- To build awareness for nonprofits that are making a difference in the community
- To give members a voice in how the credit union's charitable money is allocated
- To ensure that the organizations the credit union supports align with the causes that are important to members
- To encourage a spirit of philanthropy and giving in credit union members

### What strategies were implemented to reach the project's goals?

In the launch of Workers Kindness, members received a voting call to action via email, online/mobile banking and web alerts. Members were asked to vote by filling out a survey link from a slate of five pre-selected charities and to nominate organizations for inclusion on future ballots. The launch of Workers Kindness was a great success. Five thousand members voted on how to allocate \$25,000 worth of philanthropic funds. As a result, Big Brothers Big Sisters of Central MA, Gardner Community Action Committee, Habitat for Humanity of Greater Lowell, Making Opportunity Count, and Second Chance Animal Services all received donations proportional to the votes they received. Since then, Workers Kindness has become a quarterly member engagement and philanthropic event, with 10,000 votes cast in the second Workers Kindness survey and more than 5,000 votes in the third and fourth.

### What were the specific, measurable results achieved?

The May launch of Workers Kindness was a great success with more than 5,000 member votes. The following organizations have received donations for unrestricted use:

- Big Brothers Big Sisters of Central MA - \$5,625.75
- Gardner Community Action Committee - \$ 3,840.03
- Habitat for Humanity of Greater Lowell - \$4,247.91
- Making Opportunity Count - \$4,934.34
- Second Chance Animal Services - \$6,351.97

In September, Workers Credit Union held its second round of Workers Kindness, with more than 5,000 member votes. Each of the following organizations was nominated:

- Household Goods - \$4,581.95
- Cancer Support Fund of Central MA - \$5,996.69
- Kylee's Kare Kitz for Kidz - \$5,709.92
- New England Amputee Association - \$3,205.46
- Ahimsa Haven - \$5,505.99

In December and January, Workers Credit Union held its third round of Workers Kindness, with more than 5,500 member votes. Each of the following organizations was nominated:

- American Foundation for Suicide Prevention: \$6709.19
- Community Teamwork Lowell: \$4279.77
- Growing Places Garden Project: \$5994.39
- Montachusett Veterans Outreach Center: \$8016.65

In March 2023, Workers Credit Union held our most recently round of Workers Kindness with more than 5,000 members votes. Each of the following organizations was nominated:

- Cameron's Crusaders: \$7,611.42
- NAMI Middlesex: \$6,669.81
- Operation Service: \$5,955.74
- Pat Brody Shelter for Cats: \$4763.03

### Define the project's target audience(s).

Workers Kindness' audience was the 120,000 members across Central Massachusetts that Workers Credit Union serves. More than 20,000 votes have come in allowing members to have an impact on the charitable donations Workers Credit Union has made.

### How did the project impact the community?

So far, \$100,000 has been given to 18 different non-profits in the region – helping fund causes that range from youth enrichment to animal services to homelessness.

### Please explain which of the 8 cooperative principles that govern credit unions your project supports and how it supports them

While Workers Credit Union's Workers Kindness program reflects all of the eight cooperative principles, it is a clear example of Democratic Member Control. Workers Kindness gives members a voice in philanthropic funds are how they are allocated each quarter. By allowing members to "vote" with their kindness, Workers Credit Union put members in the driving seat of the credit union's giving and philanthropy.

"Workers Kindness is a tool they can use to positively impact the places where they live and work. It is their opportunity to improve their communities," said Doug Petersen, President and CEO of Workers Credit Union.

Workers Kindness ensures that the credit union's philanthropy aligns with the member's community needs and priorities.

### Page: Attachments

#### Credit Union Logo

Download File ([https://cunaawards.secure-platform.com/file/49576/eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJtZWVpYUkIjo0TU3NiwiYWxs3dOb3RTaWduZWRVcmwiOiJGYWxzZSIsImInbm9yWorkersLogo\\_cmyk.jpg](https://cunaawards.secure-platform.com/file/49576/eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJtZWVpYUkIjo0TU3NiwiYWxs3dOb3RTaWduZWRVcmwiOiJGYWxzZSIsImInbm9yWorkersLogo_cmyk.jpg))

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**Weblink 1****Weblink 2****Weblink 3****Page: Final Submission**

**Is there anything else you would like to include or make judges aware of?**

**Acknowledgements**

I acknowledge that photos submitted may be used to promote future awards programs by CUNA or the League., The person listed can serve as a contact for this submission, the Organization name is listed as it should appear on any award won, and that the address listed is accurate and able to receive a shipment, should this application win an award., All information provided is correct, to the best of the submitter's knowledge.

Thank you!