



**CROSSstate**

Credit Union Association

*2021*

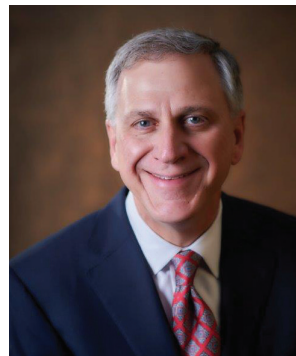
IMPACT  
REPORT

## PRESIDENT & CEO



PATRICK CONWAY  
CrossState Credit  
Union Association

## BOARD CHAIR



RICK STIPA  
TruMark Financial  
Credit Union

## BOARD OF DIRECTORS

DAVID ARDIRE, Campbell FCU

JIM BURNS, Jersey Shore FCU

JEFF DEBREE, Penn East FCU

TRACI DONAHUE, Cross Valley FCU

ERNIE HUGGARD, First Harvest FCU

ANDY JAEGER, Credit Union of New Jersey

WENDY KINGSLAND, Visionary FCU

JOHN MURGA, Hidden River Credit Union

JAY REED, Service 1st FCU

STACEY REMICK, Penlanco FCU

AMEY SGRIGNOLI, Belco Community Credit Union

ANNEMARIE SHINN, Research 1166 FCU

BOB STEEVES, Essex County Teachers FCU

TRACY SUSSMANN, MidState FCU

## OUR VALUES

INTEGRITY • TRUST • RESPECT • OPTIMISM • EXCELLENCE

### MISSION:

CrossState provides advocacy, resources, and solutions for credit unions.

### VISION:

To provide leadership in promoting credit unions and their unique philosophy.

# ADVOCACY

Moving Your Credit Union Forward in D.C., NJ, and PA

## Spring Hike from Home, Fall Hike from Home, and State Legislative Days

Interacting with state, federal, and local officials on behalf of credit unions is one of our top priorities. During these three events alone, we met with **35 congressional offices, 16 members of Congress**, and heard from: Federal Reserve Bank of Philadelphia, NCUA, CFPB, and a host of meetings with legislators.



### 2021 Meetings

In 2021, CrossState organized meetings with New Jersey's **12 House and two Senate offices** at least twice, and **25 New Jersey elected officials**. In Pennsylvania, we met with the **entire 18 member Congressional delegation, and two Senate Offices**. We met with **nearly half of Pennsylvania's 253 member General Assembly** from our work on the Banking Fund and cannabis banking, fundraisers, and general meetings.

Advocated on current and proposed policies and regulations with both state and federal regulatory agencies on issues of importance to credit unions



**1,258**  
Registrations

### For 25 CrossState Compliance Webinars

help credit unions stay on top of ever-changing regulations



Our compliance hotline allows our credit unions to get **real-time responses** to compliance questions and concerns.

### Top 3 Hotline Topics:

- Decedent Account Related Issues
- Lending Related Questions
- Questions on Powers of Attorney

## COMPLIANCE & AUDIT TRAINING



Keeping credit unions informed on the world of ever-changing compliance and regulatory policies, and ensuring they receive training on issues required by state and federal regulators



**1,101**  
Received  
Training

### Virtual BSA Volunteer Training

464 registrants  
from 55 credit unions

### Virtual BSA Staff Training

655 registrants  
from 68 credit unions



## COMPLIANCE & AUDIT CONTRACTS



**48**

Compliance  
Consulting  
Clients



**337**

Audit  
Services  
Clients

We provide Compliance and Audit services to credit unions to ensure they're effectively monitoring their performance and give them confidence during their regulatory exams

# EDUCATION & NETWORKING

We provide credit unions with timely, relevant, cost-effective educational and networking opportunities for management, staff, and volunteers.

**Emerging Leaders  
group grew to  
280 members**



## 2021 IMPACTFUL EVENTS

**MAY**

### **Virtual Convention**

Attendees across NJ and PA were able to network virtually, hear from expert speakers, and attend informative learning labs.

**JUL**

### **Virtual Evoke**

A virtual event for over 50 marketers to learn cutting edge marketing techniques to improve marketing.

**AUG**

### **Leadership School**

Held in conjunction with Penn State Corporate Learning, students hone their leadership skills in the classroom and during hands-on teambuilding exercises.

**SEP**

### **Fall Leadership Conference**

Attendees heard from dynamic keynote speakers on generational differences, protecting members from hackers, and powering credit unions to success.

**DEC**

### **CEO Summit**

This event held in Key West featured discussions about the economic outlook, the fraud battle, and more.

# WEBINARS

CrossState's webinars allow members access to our team and partners' expertise on a variety of topics, without leaving the office.



## Top 3 Most Popular Webinars:



**522 Attendees for Partner Webinars that featured products and services that help credit unions grow.**

# COMMUNICATIONS

We distribute a variety of informative publications, newsletters, reports, and blogs to keep our members up-to-date on the latest industry news and events.

## Publications *to stay informed*



CrossState Daily hits nearly 3,000 inboxes of credit union leaders, legislators, and business partners every morning.

Compliance Connection Weekly & Advocacy Works newsletters features hot topics for credit unions to stay up-to-date and informed.

Our quarterly magazine CU Edge features articles written by our own expert staff and business partners

## Social Media & YouTube

Our Facebook, Twitter, LinkedIn, and Instagram inform members about the Association's happenings and share the great work our credit unions are doing.



# MEMBERSHIP

Each year, we strengthen, expand, and enhance our membership experience to provide the expert support, services, and guidance your credit union is looking for.



**337**  
Total  
Members

**CrossState members receive a host of membership benefits to help their credit unions and the movement continue to grow. Dues dollars go towards advocacy efforts, and give access to exclusive education, training, resources, and products and services.**

**New Jersey and Pennsylvania credit unions serve more than 5.5 Million consumers in virtually every community throughout the two states**



## **2021 Welcomed These New Members:**

- The Atlantic FCU
- First Financial FCU
- Garden Savings FCU
- NJ Gateway FCU
- Novartis FCU
- North Jersey FCU
- Rutgers FCU
- Ukrainian Selfreliance of Western PA FCU
- Inspire FCU

***Interested in learning more about membership? Contact Cindy Russell at [crussell@CrossState.org](mailto:crussell@CrossState.org) or by calling 717-839-2226.***

# Moving your credit union forward >

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