



PointWest
CREDIT UNION

IMPACT REPORT 2024

INTRODUCTION & OBJECTIVES

As part of our commitment to the community, we continue to provide business technical assistance, credit counseling, financial education workshops, homeownership counseling, and community personalized resources.

These commitments are delivered through workshops, both in person and online, and by maintaining connections with community partners at networking events like **Pitch Latino** or tabling at the **NAYA Homeownership Resource Fair**.

This year has been special as our team has grown with the addition of **Alyssia Partida**, our **Community Impact Coordinator**. This expansion allows us to intentionally deliver support to counties in Oregon where we previously lacked a presence. We look forward to launching new partnerships in those counties and fulfilling our mission and commitment to all 14 counties we serve.

KEY METRICS



Total Events Conducted: **34**



Total Partnerships Established: **31**



Service Hours Invested: **564**



Community Members Engaged: **5,596**

SUMMARY OF KEY ACTIVITIES

In 2024, we deepened our presence in rural areas around Central Oregon through a new collaboration with **RootedHomes**. This nonprofit organization supports families who contribute to the local economy by creating environmentally sustainable and permanently affordable housing opportunities through the Community Land Trust model. Thanks to additional support from the **Latino Community Association**, we hope to expand our presence in Central Oregon at Latino Fest 2025 in Madras.

In the spring, we had the opportunity to partner with Capaces Leadership Institute in Woodburn, to deliver a four-part Financial Educational Series. Starting with the fundamentals of banking, the importance of budgeting and investing, business banking and lending opportunities, and ending with a guest speaker from ARCE Booking to assist with tax related questions. These sessions empowered participants and armed them with the knowledge to confidently start their financial journey.

We also restored our partnership with **El Programa Hispano Católico** with support to various community focused events and fundraisers. For the Back-to-School Drive, we were able to get connected with the VIDA team at Adidas, a newly organized Employee Resource Group (ERG) that focuses on celebrating and supporting Hispanic and Latino communities in North America. In this connection, Adidas was able to generously donate 30 boxes of backpacks, helping over 150 families and bringing smiles to children on their first day of school. We are truly grateful to Adidas for their support and for strengthening our partnership with El Programa Hispano Católico.



SUCCESS STORIES & TESTIMONIALS



We are proud to be partners with Bienestar de la Familia, a Multnomah County program, for the past four years. Together, we provide financial education workshops on topics such as budgeting and credit (available in both English and Spanish) and have been invited to regularly present these workshops to Bienestar participants in 2025. In June 2024, Bienestar distributed \$50,000 in rent assistance, helping tenants at Allen Fremont Plaza avoid eviction. This success highlights our shared dedication to uplift and support vulnerable community members.



In collaboration with the Consulate of Mexico, we participated in the 5th edition of the Consular Entrepreneurship Program for Mexican Women Abroad (PCEME), working with 20 women who dedicated over 180 hours to learning entrepreneurship essentials. This six-month, fast-track course challenged entrepreneurs and in the end, enhanced their personal and professional confidence. More importantly, it created a community of peers and leaders between participants.

COMMUNITY FEEDBACK & ENGAGEMENT

This year marked our fourth Spanish Listening Session, where members shared personal and community feedback. During the discussion, members emphasized the need for more education and resources around shared banking, and expressed interest in a money transfer app like Zelle. Thanks to this valuable feedback, the credit union will be launching a multi-platform money transfer service in the coming year.

In December, we launched our first **Community Partnership Survey** to gather insights from current and past partners. This feedback will help us understand their needs and improve our collaborations. Together, we aim to strengthen relationships and create greater community impact.



LOOKING AHEAD

In 2025, we are committed to championing small businesses by exploring innovative services that will empower entrepreneurs to thrive in the next chapter of their journey. Our strong partnerships with organizations such as **MESO**, **Livelihood NW**, and **Community Lending Works** showcase the impact of working together. Collectively, we aim to close critical gaps and create new opportunities for entrepreneurs to achieve their dreams. We are determined to strengthen our relationships with community partners. We feel reenergized to collaborate and unify our work to uplift those communities in need. Our strategy will include establishing new partnerships, celebrating and sharing members' testimonies, and continuing to be a beacon of support for underserved communities.

Serving 14 counties has unlocked opportunities to address the unique challenges of rural areas where financial services are most needed. With our growing team, we are inspired and ready to make 2025 a transformative year—one that is brighter, bolder, and rooted in community empowerment.



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