



# 2023 Social Impact Report

**Empowering  
our community**



desert  
**FINANCIAL**<sup>TM</sup>  
CREDIT UNION

2023 was a year of giving, growing and learning. Through our social responsibility programs, we connected with our members, team and community to help build a strong foundation with education and financial literacy. Our free financial well-being webinars and financial literacy content provided to students and educators, along with our online resources, empowered thousands of Arizonans to take control of their financial health and futures in 2023. Continue reading to learn more about our social impact.



## 2023 Giving Highlights



**\$4.5 million**

Provided through corporate, foundation and employee giving



**\$1.15 million**

Raised for the 1 Darn Cool School at Phoenix Children's



**18,000+**

Volunteer hours in the community

# Desert Financial's social impact programs

As part of our Give and Grow strategy, Desert Financial is committed to sharing success with our members, team and community through these programs and initiatives.



## Corporate Giving & Volunteering:

Our organization and team members are always willing to exercise their Passion to Help (one of our core values) through programs that serve the community.



## Financial Well-Being:

By providing tools and information on financial literacy, we empower our members, team and community to take charge of their financial health.



## Random Acts of Kindness:

Since 2018, we have been performing Random Acts of Kindness as part of our commitment to share success and provide exceptional experiences within our community.



## Teacher Appreciation:

Founded by educators in 1939, Desert Financial is committed to building on the legacy of our founders through our Teacher Appreciation events and Adopt-A-Teacher program.

---

## Desert Financial Foundation fundraising and programs:



Desert Financial Foundation develops and manages social responsibility programs supporting education. Some of the foundation's fundraising efforts include the Annual Charity Golf Tournament and fundraisers for the 1 Darn Cool School at Phoenix Children's. The foundation also provides a variety of scholarships including the Community Service, Adult Learners and Student Athlete Scholarships.

# Giving back to our community

Through partnerships and our own programs, we're proud to support and invest in our community.

## Random Act of Kindness: ASU® Homecoming Parade and Block Party

In 2023, Desert Financial performed nearly 13,400 Random Acts of Kindness. We were excited to continue the celebration of our new partnership with Arizona State University® at their Homecoming Parade and Block Party, where we performed 800 Random Acts of Kindness to families, students, teachers and festivity goers by handing out Nintendo Switches, movie theater vouchers, Polaroid cameras, headphones and much more.



## Grant Recipient: Phoenix Day Early Childhood Education Program

Phoenix Day is a nationally accredited bilingual early childhood education program in South Central Phoenix. Through A New Leaf, a nonprofit housing and social service agency in Mesa, Desert Financial hosts regular story times at the center. ***“Support from community partners like Desert Financial helps ensure low-income children enter kindergarten ready to learn by supporting the development of skills needed to succeed in school and in life,” says Michael Hughes, Chief Executive Officer at A New Leaf. “Thank you, Desert Financial, for your continued support of A New Leaf and Phoenix Day.”***



**\$300,000**

in community grants awarded

**55,878**

individuals impacted through funded grant programs

**13,390**

Random Acts of Kindness performed and \$359,727 awarded

**\$1.8 million**

in corporate and community giving, impacting 125 organizations

# Our team's passion to help

By supporting our community through volunteer service and monetary giving, our team demonstrates one of our core values, Passion to Help.

## Highlight Story: Jonathan Knight, Volunteer of the Year

Desert Financial's impact in the community would not be possible without our volunteers. Prescott Valley branch manager Jonathan Knight volunteered 323 hours in the community in 2022, involving his team in various community service initiatives in Northern Arizona and serving on the board of directors for Yavapai Big Brothers Big Sisters. He facilitates opportunities for him and his team members to give back in a variety of ways, including at schools. He has been instrumental in helping Desert Financial grow our community partnerships in Northern Arizona, and we're grateful for the relationships he builds with local nonprofits and community members.

“Desert Financial empowers me to give back to my community by the culture that it creates. It's what we're about; it's infectious.”

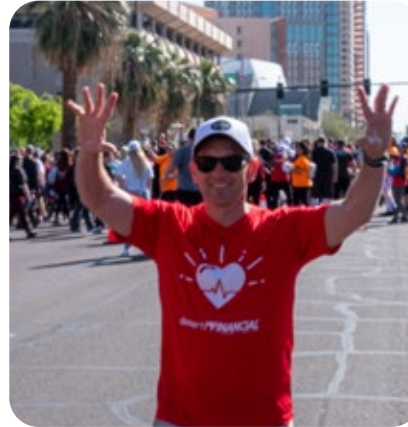
**- Jonathan Knight,  
Volunteer of the Year**



# Our team's passion to help

## Highlight Story: American Heart Association

In 2023, Desert Financial raised \$113,053 for the American Heart Association through the Phoenix Heart Walk. Since 2020, Desert Financial team members have raised more than \$370,178 total in donations, which have helped the association fund lifesaving research.



**\$113,053**  
raised for Phoenix  
Heart Walk with 315  
walkers participating

**\$606,403**  
raised through our  
Sharing & Caring Campaign  
and other fundraisers

**18,492**  
hours volunteered by  
our team; a \$557,164  
value to our partners

**234**  
students reached with budgeting  
and savings awareness  
through volunteer efforts

# Committed to education

As a credit union founded by teachers in 1939, we're proud to continue our support for education through grants, donations, fundraising, corporate giving and volunteering.

## Teacher Appreciation Story: Taylor Jr. High School

To show appreciation for their educators at Taylor Jr. High School in Mesa, our Office of Strategic Management treated the teachers and staff to lunch, new tumblers, treats, gift cards, new items for their teacher's lounge and a surprise visit from Desert Financial President and CEO Jeff Meshey and Desert Financial spokesperson Anthony Robles.



## Adopt-A-Teacher Story: Willie Munoz

Ms. Willie Munoz has been teaching for 25 years, covering everything from math to art along with coaching basketball and soccer. Currently she teaches art at Palo Verde Middle School in the Washington Elementary School District. ***"This opportunity means that I can provide all the art supplies my students need and want to create incredible art projects and provide flexible seating options for my kids to do their best work,"*** says Willie.



81

Teacher  
Appreciation  
events

14

Arizona teachers adopted for  
the year, providing \$42,000 to  
help with classroom supplies

4,500

backpacks and  
school supplies  
donated

3,332

educators and post-secondary  
students engaged in financial  
well-being education

# Building financial well-being



“I cannot thank you enough for your help and support. I really appreciate all you have done to help my students in their journey through personal finance.”  
– **Kim Mickle, St. Mary Basha Catholic School**

“My experience in this webinar was very resourceful. I gained clear sight on what tools I need to have a successful future. I can set better goals for myself and expectations in my life.”  
– **Webinar attendee, Life Stage Financial Planning**

One of the ways we give back to our community is through financial well-being programming and education. In 2023, Desert Financial also partnered with Gnosis IQ to bring financial literacy content to students and their families through their online platform, providing financial well-being to community members who might not otherwise have access to these resources. “You can’t have financial well-being without knowing a little about finance, and we’re excited to be bringing that to schools and to the parents through our partnership with Gnosis. The earlier we can teach children basic financial concepts, the better, and the more success they’ll have in life,” Desert Financial President and CEO Jeff Meshey says.

**“We’ve seen that finances are one of the social determinants of health, and it impacts students and their family’s way of life. Helping students to learn about finance, and helping them see the importance of it, will help them relieve financial stress and live healthier lives.” – Mario Ventura, superintendent, Isaac School District**

---

**134,273**

views of financial wellness content on DesertFinancial.com

**7,255**

people attended/watched an educational Desert Financial webinar/workshop

**15,505**

individuals impacted through financial wellness content

**923**

youth reached through financial wellness programming



# Desert Financial Foundation



## 2023 Community Service Scholarship recipient

Founded in 2015, Desert Financial Foundation gives back to our community through fundraising and education. In 2023, the foundation awarded a \$10,000 Community Service Scholarship to Gianna, a nursing student at Northern Arizona University who began volunteering at a young age and continues to give back in extraordinary ways, helping with local fundraisers, community festivals and mentoring young children. To donate, [visit DesertFinancial.com/Foundation](https://DesertFinancial.com/Foundation).



“It’s important for me to give back to my community because they have given so much to me. I grew up attending afterschool programs and summer camps, and they honestly took part in raising me. I feel like it did take a village, and it’s only right that I give back. It is a full circle moment.” – **Gianna, 2023 Community Service Scholarship recipient**

**\$320,750**

in scholarships  
provided

**261**

students impacted  
through scholarships

**\$722,602**

raised for the  
1 Darn Cool School at  
Phoenix Children’s

**11,566**

patient engagement  
sessions at 1 Darn Cool  
School at Phoenix Children’s



# Thank you!

Thanks to the support of our members, team, partners and community, we continued to share success and helped support Arizonans!



desert  
**FINANCIAL**<sup>TM</sup>  
CREDIT UNION