

NW MESA Program

Onboarding: MESA Engagement

Spread the Word

Identify and inform college account holders and members with high school and college aged children

- Email
- Newsletters
- Statement inserts
- Text message (*if applicable*)

Use posters and flyers


- Give them to MSR
- Provide them to partner college/university
- Hang them in your branch

Customize the MESA Outreach Toolkit

Available at NWMESA.coop:

- Facebook and Twitter posts
- Newsletter inserts
- Press releases (2)
- Radio spots (2)
- Flyer
- Poster with tear-aways





With student loan debt nationally totaling more than \$1.2 trillion, families and students are looking for alternative ways to afford college. When funds fall short for students working toward a college degree, MESA can help bridge the gap. With the help of NWCUF and Northwest credit unions, the MESA program can help turn \$100 into \$300 or more toward books and tuition.

The MESA program was developed to provide students with the knowledge and tools to make well-informed financial choices, to build their assets long after the program ends – because developing solid savings habits and increasing financial literacy now is useful throughout a student's lifetime.

STUDENTS:
STARTING POINT

COLLEGES:
READY TO GET STARTED

CREDIT UNIONS:
READY TO GET INVOLVED

Credit Unions Overview

The Northwest MESA Program is dedicated to helping students save for post-secondary education at school in Idaho, Oregon or Washington. The special matched savings account is matching participant's savings \$1 up to \$300. Credit unions are ideal financial institutions to host matched savings accounts and provide the related services.

Credit Union

- Identify staff member as CU MESA Contact to be primary contact and coordinator for program
- Assist city participants to open accounts and explain program requirements
- Promote MESA program to membership and community
- Regular communication between program partners – NWCUF, NCUCC, schools and participants
- Accept application and forward to NCUCC for approval (CU not responsible for reviewing applications)

Account Opening and Maintenance

- CU MESA Contact receives email notification as new participant enrolled into program
- Participant contacts CU MESA Contact to schedule account opening meeting
- CU MESA Contact opens restricted account and reviews program expectations and materials
- Notify NCUCC once account is opened and initial meeting complete
- Provide NCUCC with needed account activity
- Distribute MESA identity statements to participants once received from NCUCC

MESA Qualified Withdrawals

- Assist and assist staff with withdrawal requests from participants. All requests must include copy of statement and/or invoice from school and/or school operators
- Submit qualified withdrawal request to NCUCC for processing. NCUCC will fee participant has completed all requirements before approving a qualified withdrawal
- Withdrawal dollars will be sent to check or transferred to credit union
- Credit union deposits match funds into the participants MESA and processes a check for the total amount requested (savings + match)
- Credit unions will communicate if student withdraws from the program voluntarily

Marketing

- NWCUF and NCUCC will provide outreach and marketing materials
 - Print, web, applications iOS and Android, social media posts, etc.
- Credit unions are encouraged to use the program as a promotion of the credit union and credit union philosophy
- Collect and share testimonials from participants

- **NWMESA FAQ**
- **NWMESA General Responsibilities CU**
- **NWMESA Account Opening Checklist for CU**

Handing Toolkit for Credit Union Handlers:

- **MESA Flyer** to be distributed in the credit union or as a statement insert
- **MESA Poster** to be displayed in the credit union with the Tear-Away
- **MESA Tear-Away** to be printed as a multiple sheet label, attached to the MESA Poster, and displayed in the credit union
- **Sample NWMESA Sample Facebook and Twitter posts**
- **Sample Press Release**
- **Sample Press Release 2**





Questions