



Professional Development Grant Application

Generously supported by the James V. and Elizabeth N. Hamilton Foundation

The Carolinas Credit Union Foundation helps enrich the lives of those in the Carolinas by supporting the ability of credit unions to make a greater impact in their communities. Through Professional Development Grants, small credit union staff and volunteers are able to grow their knowledge to better serve members. Thanks to the financial support of Summit Credit Union and the Elizabeth N. and James V. Hamilton Fund, credit unions with \$50 million or less in assets are eligible for grants to cover top-tier training and education expenses.

Instructions for Grant Submission & Reimbursement

To streamline the application process for 2021, the Foundation is eliminating the need to complete the standard two-page grant application. Instead, if your credit union is interested in applying for a grant for 2021, we are asking that you simply send me an email to lwhaley@carolinasfoundation.org with the following details:

- 1) Your credit union's assets and net worth (from the latest quarterly call report)
- 2) What professional development opportunity is needed and a brief explanation on how the grant will benefit you, your credit union and/or the community.

The deadline for grant submission is December 18, 2020.

If your credit union is selected as a grant recipient, you will be required to submit an expense reimbursement form and funds will be made payable to your credit union (via a check or ACH transfer). Travel and accommodation expenses will be the responsibility of the credit union. A maximum of \$1,250 per credit union per calendar year may be awarded. The following conferences are eligible for grant funding.

2021 Training/Development Grant Options

- MACCU Spring and/or Fall Conference**
- CCUL Risk and BSA Conference**
- East Coast Marketing Conference**
- CCUL Webinars**
- CCUL Annual Meeting**
- Vizo Financial Conference**
- Southeast Directors Conference**
- Coastal Internal Auditor Conference**
- Strategic Planning (your choice)**
- Onsite Training (your choice)**
- National or Regional School (your choice)**
- National or Regional Conference (your choice)**

Elizabeth "Sis" Hamilton served as the manager and CEO of Summit Credit Union for 60 years and served on the board of directors for 70 years, making her the longest serving credit union volunteer in U.S. history. During that time, she managed as many as five other credit unions while also managing Summit Credit Union. Sis was a pioneer in our industry and valued the important role of small credit unions in our communities. In honor of her legacy and that of her late husband, Summit Credit Union has allocated \$100,000 to the Carolinas Credit Union Foundation to underwrite a portion of its Professional Development Grant Program to preserve the important role of small credit unions in the Carolinas.