

# 2026 DEVELOPMENT ISSUES WORKSHOP



CAROLINAS  
CREDIT UNION  
FOUNDATION

## SPEAKERS



Charlotte



This year's Development Issues Workshop would not have been possible without the support of our sponsors.  
**THANK YOU!**





# CAROLINAS CREDIT UNION FOUNDATION

## DEVELOPMENT ISSUES WORKSHOP AGENDA

May 6, 2026

8:30 – 9:00 AM

**Coffee, Breakfast & Registration**

Networking, Dress for Success donation drop-off

9:00 – 9:10 AM

**Welcome & Opening Remarks**

9:10 – 9:45 AM

**Opening Session: Workforce Readiness in Action: Creating Employment Opportunities**

**Speaker:** Dr. Emily Jensen Wheeler, CEO, Dress for Success Charlotte

**Session Focus:** Learn how Dress for Success Charlotte supports women in overcoming barriers to employment through career development, professional attire, and ongoing support, creating pathways to long-term financial independence.

**Learning Objectives:**

- Understand key barriers to workforce entry and advancement
- Recognize the connection between employment, income stability, and financial well-being
- Explore effective models that support both job placement and long-term career success
- Identify opportunities for credit unions to support workforce and economic mobility through partnerships and community engagement

9:50 – 10:50 AM

**Financial Counseling as a Strategy: Advancing Financial Well-Being**

**Moderator:** James Jeter, VP of Business and Community Development, Skyla Credit Union

**Panelists:** Stacey Adams, Financial Education Manager, Founders FCU; Annie Jones, Financial Wellness Manager, Skyla CU; and Chelsea Newton, Community Engagement Manager, Spero Financial FCU

**Session Focus:** This panel will explore how credit unions are moving beyond traditional financial education to deliver impactful, one-on-one financial counseling that drives real outcomes for members. Through programs like the Financial Counseling Certification Program (FiCEP), staff are equipped to provide trusted guidance on budgeting, debt management, credit building, and long-term financial wellness. Panelists will share how they are embedding counseling into their service models to reach underserved populations, strengthen relationships, and improve financial stability.

## Learning Objectives

- Understand how financial counseling programs drive measurable improvements in member financial health
- Explore scalable models for embedding financial counseling into credit union operations
- Identify opportunities to leverage counseling as a strategic tool for financial inclusion and impact

## 10 Minute Break

### 11:00 – 11:30 AM

#### **A New Model for Financial Capability: Lessons from Common Wealth Charlotte**

**Speaker:** Tashara Brown, CEO, Common Wealth

#### **Session focus:**

This session will explore how Common Wealth Charlotte is redefining financial education by focusing on financial capability and long-term behavior change. Through a unique, trauma-informed approach that combines education, one-on-one counseling, access to safe banking products, and 0% interest loans, the organization is helping economically vulnerable individuals move toward lasting financial stability.

#### **Learning Objectives:**

- Learn how trauma-informed financial counseling can improve engagement and behavior change among economically vulnerable populations
- Explore innovative tools such as 0% interest loan programs and re-banking strategies, that help individuals avoid predatory lending and build stability
- Learn how this model addresses the real barriers faced by working families and how partnerships with credit unions help scale impact

### 11:35 AM – 12:00 PM

#### **From Challenges to Change: Addressing Development Issues Through Credit Union Action**

**Speaker:** Lauren Whaley, President, Carolinas Credit Union Foundation

**Session Description:** This session will explore the 12 Development Issues identified by the National Credit Union Foundation and its signature CUDE Program. Participants will hear practical, “how-to” approaches that can be applied within their own organizations to advance financial inclusion and community impact.

#### **Learning Objectives:**

- Identify practical, actionable strategies that can be implemented within your own credit union
- Sets the stage for peer discussions during networking breaks and beyond to share ideas, challenges, and opportunities for impact

### 12:00 – 12:45 PM

#### **Networking Lunch**

## 12:50 – 1:50 PM

### **The ALICE Experience: A Real-World Look at Financial Survival & the Role of 211.**

**Speaker:** Sally Gordon, Director of Mission Advancement, United Way of North Carolina

**Session Focus:** This interactive session will provide a deeper understanding of ALICE (Asset Limited, Income Constrained, Employed) households. Through a condensed simulation experience, participants will gain insight into the daily financial challenges faced by ALICE households and the difficult trade-offs they navigate.

The session will also highlight the role of NC 211 as a critical resource connecting individuals to essential services, including housing, food, healthcare, and financial assistance. Together, these tools offer a clearer picture of the challenges facing many communities and opportunities for credit unions to better support members in need.

#### **Learning Objectives:**

- Understand the scale and characteristics of ALICE households across the Carolinas
- Experience the systemic pressures impacting financial stability for working families
- Learn how NC 211 functions as a key infrastructure for community resource coordination

## 10 Minute Break

## 2:00 – 2:30 PM

### **Purpose in Action: Expanding Access Through Advocacy and Community Commitment**

**Speakers:** Robert Dozier, CEO, Palmetto Citizens FCU & Billy Boylston, Chief Advocacy Officer, Carolinas Credit Union League

#### **Session Description:**

This session will highlight how credit unions are living out their mission by expanding access to financial services in underserved communities—and the critical role advocacy plays in making that work possible. Hear from Palmetto Citizens FCU on their recent branch opening in a South Carolina community left underserved by traditional financial institutions, and how that investment is making a tangible impact.

The discussion will also explore how advocacy efforts at the state and federal levels help ensure credit unions can continue to meet the evolving needs of their members and communities. Together, this session will connect purpose, action, and policy—demonstrating how credit unions can amplify their impact through both direct service and strong advocacy.

## 2:35 – 3:05 PM

### **Housing & Homelessness: A Community Perspective**

**Speaker:** Liz Clasen-Kelly, CEO, Roof Above

**Session Focus:** Understanding housing instability and homelessness in Charlotte, including key barriers to affordability and the broader impact on individuals and communities.

#### **Learning Objectives:**

- Understand the structural and economic drivers of housing instability in the Charlotte region
- Challenge common misconceptions and better understand the populations most affected
- Hear creative opportunities supporting housing stability through partnerships and community investment

**3:10 – 3:45 PM**

**Collaborative Solutions: Advancing Housing Affordability**

**Speakers:** SECU Foundation

**Session Focus:** Hear from SECU Foundation on the success of its housing initiatives across North Carolina. Learn how cross-sector partnerships, including credit unions, foundations, and community organizations, can work together to address housing affordability challenges at scale.

**Learning Objectives:**

- Understand how collaborative funding models are being used to address housing challenges
- Learn how credit unions can be part of the solution within multi-funder, “capital stack” partnerships
- Identify practical ways to engage in housing initiatives within your own community

**3:50 PM – 4:00 PM**

Afternoon wrap-up and giveaways from [Cakeable Cafe](#) in uptown Charlotte. Cakeable is a nonprofit workforce development program for adults who live with intellectual and developmental disabilities.

**Give-Back Details:**

**We are proud to partner with Dress for Success Charlotte on a donation drive!**

*Dress for Success Worldwide is the leading resource for advancing women in the workplace globally. Their purpose is to empower women to achieve economic mobility by providing a global network of support, workplace attire, and development tools for success.*

Dress for Success Charlotte is looking for the following items:

- Suits, separates and professional attire in season, in style, on hangers and clean.
- Accessories, including scarves, belts, and jewelry – please put jewelry in clear, Ziplock type bags to avoid breakage and tangling
- New and next to new shoes and purses



**Charlotte**