

# Potential

Improving Lives By Serving Credit Unions, Their Staff & Members



Nº 41

Donor Recognition Issue

Spring 2021

## Not Too Late To Promote \$12,000 Credit Union College Scholarship

The March 31st deadline may be closing in, but you still have time to volunteer to judge and encourage young members to apply.

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## Tap Expertise of Seasoned CU Professionals with Roycroft Masters

Need to consult with a credit union professional on an issue you're facing? Meet and engage with our Roycroft Masters.

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## Thank You! Complete Listing - 2020 Annual Appeal Donors

In a combined show of support, credit unions, businesses, and individuals donate generously to enable Foundation programs.

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## Training Grants Keep Staff, Volunteers Up-To-Date

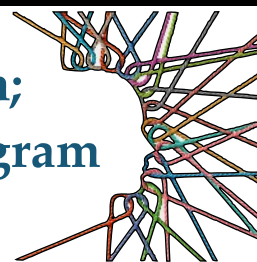
Over \$130,000 in training grants have been awarded to eligible credit unions. Are you getting your share?

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## CU Foundation Supports DEI Certificate Participation; Announces Financial Assistance for Georgetown Program

Credit Unions with up to \$500 Million in Assets Eligible; 50% Program Costs Awarded



To support local credit unions, the CU Foundation MD|DC is offering financial assistance for the Diversity, Equity, and Inclusion (DEI) in the Workplace certificate program offered by Georgetown University in partnership with the MD|DC Credit Union Association. The Foundation is providing a limited number of grants to help professionals who are employed by credit unions with under \$500 million in assets to participate in the program. The Foundation grants reimburse fifty percent of awarded participants' program fees.

"The Foundation Board is committed to provide assistance to local credit unions and enable them the opportunity to receive diversity, equity, and inclusion certification through this program," said CU Foundation MD|DC Chair Ron Shockley. "By reimbursing half of the course fee for credit unions with assets up to \$500 million, we hope to bring this important initiative within the financial reach of local credit unions who otherwise could not afford participation. We are grateful to our generous Foundation donors for making this grant offering possible." (See listing, page 3)

"We are pleased to be joining with the Credit Union Foundation MD|DC and Georgetown University to offer credit union professionals the opportunity to deepen their knowledge, increase awareness, and inform individual and organizational actions to promote diversity, equity, and inclusion," said MD|DC Credit Union Association President/CEO John Bratsakis. "It's a part of a multidimensional program the MD|DC Credit Union Association is offering to provide meaningful tools and resources for credit unions on their DEI journey."

The certificate program will be live-taught online by faculty and experienced practitioners affiliated with the Georgetown Master's in Human Resources Management Program and Georgetown's Executive Certificate in Diversity, Equity, and Inclusion.

Combining lectures, class discussions, case studies, and hands-on application through projects, the program is designed as a cohort to promote a high level of interaction between participants. Upon successful completion of the program, participants will earn a Certificate in

Advancing Diversity, Equity, & Inclusion in the Workplace.

Participants will learn to:

- Prepare a solid business case for diversity and inclusion, and identify measures to prove the return on investment (ROI) of diversity and inclusion initiatives;
- Develop strategies and programs to attract and engage diverse talent, and achieve HR and business goals;
- Measure the progress and impact of diversity and inclusion programs and initiatives, using appropriate metrics and benchmarks, and;
- Communicate about diversity and inclusion solutions, initiatives, events and progress to diverse audiences and stakeholders.

To register, or for more information, visit the MD|DC CUA DEI Program registration site: <https://covent.me/kIM3Dz>.

Financial assistance information and the easy-to-complete application is available on the Foundation's website at [CUFound.Org/DEI](http://CUFound.Org/DEI)

## Judge For Yourself!

Join the Credit Union Scholarship Judges' Panel

The Foundation's College Scholarship Program is honored to count over 100 judges on its roster!

Participation is easy and you can complete your assigned scoring in 30 minutes or less!

- ✓ Ten essays or less to score
- ✓ Entire rating process is conveniently online
- ✓ All scoring instructions & tools provided
- ✓ Help young credit union members earn college scholarships!



Become A Judge! Visit:  
[CUFound.Org/Judge](http://CUFound.Org/Judge)

## Scholarship Deadline - March 31

*Not Too Late To Promote This Great Member Opportunity!*

The Foundation's \$12,000 College Scholarship application deadline is fast approaching and it's not too late to apply or to promote to your members.

College or trade school-bound members of any credit union based in Maryland or D.C., or other credit unions affiliated with the MD|DC Credit Union Association, are eligible. The program is completely turnkey and free for credit unions.

This year's topic for essay applicants is: "How do credit unions demonstrate the phrase, 'Not For Profit, Not For Charity, But For Service?'"

This year's video topic is: "Create a 60-second video showing how credit unions help families achieve their financial goals."

Photographers capture an original photograph that represents the credit union core value, "Improving Lives."

With the Foundation's online application process, it's easy to apply, right up to the midnight, March 31, 2021 deadline!

"Credit unions can use the scholarship to bond with and provide a tangible benefit for their young members. And there is no cost to participating credit unions. An opportunity like this is rare and credit union members deserve to know and benefit from it," noted Foundation Executive Director Kyle Swisher.



"All resources for the program are provided by the Foundation. I encourage participation on the judges' panel, too. Over 100 local volunteer judges select our scholarship winners." (see link at left)

### Free Promotional Resources [CUFound.Org/CUScholarship](http://CUFound.Org/CUScholarship)

The Scholarship Program includes:

- \$12,000 in awards
- 100+ volunteer judges
- Online application site
- Lobby posters
- Scholarship graphics
- Sample web articles

After the March 31, 2021 deadline, all credit unions with member applicants will receive a report noting who entered, with their rankings, so they may choose to recognize their members' efforts.

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## Roycroft Masters Dedicated to CU Success

The Roycroft Masters Advisory Program is designed to provide professional advice and guidance to emerging credit unions. The program pairs management staff at emerging credit unions with experienced credit union professionals who have vast experience in day-to-day operations.

Credit unions with assets of \$100 million or less may apply for the free advisory program. Once accepted and paired, the participating credit unions will benefit

from the experience, advice, and coaching provided by the Roycroft Masters team.

An initial on-site meeting at the credit union may be followed by further site visits, telephone contact, or other ongoing collaboration between the Roycroft Master advisors and the credit union leadership.

To learn more about a Roycroft Masters engagement, please visit [CUFound.Org/Roycroft](http://CUFound.Org/Roycroft)



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*Jim Whipp, President/CEO  
Five Star FCU, cradles a 5-liter  
vintner-signed Cabernet  
Sauvignon; his prize for  
holding the winning raffle  
ticket in the 2020 "Wine Me  
Up!" event. The fun wine-pull  
event, that includes the raffle,  
has netted over \$27,000 for  
Foundation programs.*

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## Keep Staff, Volunteers Up-To-Date; Stretch Budgets With Training Grants

*Credit Unions With Assets of \$150 Million or Less Eligible for up to 75% Reimbursement of Training Costs*

The Credit Union Foundation MD|DC pursues a mission of improving people's lives by supporting credit unions' abilities to serve their members and communities. Grants to support credit unions' abilities to meet training costs for staff and volunteers is an important component in meeting that important goal.

The Foundation offers training reimbursements to eligible credit unions with assets up to \$150 million to access training that improves their ability to meet the needs of the members and communities they serve.

The Foundation's Training Grant program has awarded in excess of \$130,000 in funding to local credit unions and has consistently expanded eligibility and ease of access.

"The Foundation's Training Grant Program is available to a majority of credit unions served by the Foundation," noted Foundation Grants and Programs Committee Chair Janet Oursler, President/CEO Howard County Education FCU.

"Many credit unions have received training financial support from the Foundation totaling \$5,000 or more over the years to meet their needs. Each will tell you that those grants have resulted in more effective employees and volunteers, and a higher degree of regulatory compliance," she added.



Program specifics:

- Applying credit unions select their preferred training providers
- Grants cover up to \$750 per year, per credit union, to help defray training costs
- Applicants may apply for tuition reimbursement for online or in-person course offerings
- Approved tuition reimbursements will be paid upon receipt of attendance verification
- Training reimbursement requests may be applied to the cost of training/ tuition itself, not to travel or lodging
- Applications must be submitted prior to training
- Funding for this program is limited

Applicants can apply for training assistance by completing a simple, online application.

Funding decisions are made promptly, usually within two business days of receipt of applications.

Visit [CUFound.Org/Training](http://CUFound.Org/Training) for more information or to apply. Training grants are made possible through the generosity of Foundation supporters.