



Credit Union Development Grant Application

Organization Name: _____

Organization Address: _____

Contact Person: _____

Contact Phone: _____

Contact Email: _____

Project Title: _____

For Applicable Credit Unions:

Has your credit union utilized the Small Credit Union Initiatives Account this year?

Yes No

Area of Funding:

Equipment & Technology Marketing Succession Planning

Project Description: (Provide a brief overview of the proposed project, including its objectives, target audience, and how it aligns with the SECUF Credit Union Development Grant funding priorities. Please limit your response to 500 words or less.)

Project Goals and Objectives: (List the specific goals and objectives of the project, including any intended outcomes or deliverables. Please limit your response to 300 words or less.)

Project Timeline: (Provide a timeline for the project, including key milestones and deadlines. Please include an estimated start and end date.)

Budget: (Provide a detailed budget for the proposed project, including all anticipated costs and funding sources. Please limit your response to 500 words or less.)



Community Impact Grant Application

Project Impact: (Describe how the proposed project will impact your credit union's operations, services, and/or members. Please limit your response to 300 words or less.)

Capacity and Expertise: (Discuss the capacity and expertise of the credit union staff and/or partners involved in the proposed project, including their ability to effectively manage the project and ensure its success. Please limit your response to 300 words or less.)

Grant Request: Please indicate the amount of funding you are requesting and how it will be used. (Maximum 250 words)

I, the undersigned, do attest to the best of my knowledge that the information contained in this application is true, factual, and accurate. Additionally, I understand and agree to the following:

- This application is for one year only, and if accepted, funds awarded must be used in the same calendar year.
- An incomplete grant application will not be accepted. This includes the acknowledgement and approval of this application via the President/CEO's signature below and submission of all necessary documents as outlined in the grant application guidelines instructions for submission.
- Grant funds are subject to reimbursement of expenses.
- The Grant Impact Report Form must be submitted within two weeks of project completion.
- Grantee acknowledges that the grantor may publicly acknowledge and promote the grant, including but not limited to, announcements, press releases, website, social media, and marketing materials. The grantor may use the grantee's name, logo, photos, and information about the grant for these purposes, without further approval or compensation from the grantee. However, the grantor will make reasonable efforts to consult with the grantee prior to any public announcements or promotions, and will take into account any reasonable objections raised by the grantee.

Applicant Signature and Date: *[Signature of Person Responsible for Proposal Details and Completion of Project/Program]*

Applicant Signature and Date: *[Signature of Credit Union President/CEO or Chapter President]*



Credit Union Profile & Financials Worksheet

All Credit Unions MUST complete this form and submit with grant application.

Credit Union Name: _____

Credit Union Assets: _____

Number of Members: _____

Number of Employees: _____ **Full Time:** _____ **Part Time:** _____

Charter Number: _____

Your most recent Financial Performance Report (FPR) can be viewed via NCUA's website:

<http://fpr.ncua.gov/>

Choose the option to view a 2-page FPR summary for one credit union online. Input your CU's charter number and select Ratio Analysis. In the worksheet below, provide the ratios taken from your online FPR.

Please use the two most recent quarter's information from the report and the peer average.

**if peer average is not available for the most recent quarter, select view previous quarter and provide available data. Incomplete submissions will not be accepted.

NCUA - Financial Performance Report Ratio Analysis	Credit Union (2nd most recent quarter) Date: _____	Credit Union (most recent quarter) Date: _____	Peer Average (most recent quarter **available) Date: _____
Net Worth/Total Assets (line 1)			
Delinquent Loans/Total Loans (line 6)			
Net Charge Offs/Average Loans (line 7)			
Return on Average Assets (line 11)			
Cost of Funds/Avg. Assets (line 17)			
Provisions for Loan & Lease Losses/ Avg. Assets (line 20)			
Net Operating Exp./Avg. Assets (line 24)			
Total Loans / Total Assets (line 28)			



Grant Report Form

Organization Name: _____

Project Title: _____

Grant Amount: _____

Date of Grant Award: _____

Area of Funding:

- Equipment & Technology
- Marketing
- Succession Planning

Project Description: (Briefly summarize the project, including its objectives, target audience, and how it aligns with the SECUF Credit Union Development Grant funding priorities. Limit your response to 500 words or less.)

Project Goals and Objectives: (List the specific goals and objectives of the project, including any intended outcomes or deliverables. Limit your response to 300 words or less.)

Project Timeline: (Provide a timeline for the project, including key milestones and deadlines. Please include actual start and end dates.)

Budget: (Provide a detailed budget for the project, including all costs and funding sources. Please specify the actual amount spent, if different from the original budget. Limit your response to 500 words or less.)



Grant Report Form

Project Impact: (Describe how the project impacted your credit union's operations, services, and/or members. Limit your response to 300 words or less.)

Lessons Learned: (What lessons were learned from this project that could be useful to other credit unions? Limit your response to 300 words or less.)

Project Partnerships: (Please describe any partnerships or collaborations established during the project period to support ongoing efforts. Include the name of the organization, the nature of the partnership, and the impact of the partnership on the project outcomes. Limit your response to 300 words or less)



Grant Report Form

Marketing Collateral and Media Materials:

Please provide any marketing collateral and media materials that were developed or used during the grant period, including but not limited to:

- Photographs or videos of the project activities and outcomes
- Social media posts or other digital content related to the project
- Press releases or media coverage related to the project
- Printed materials such as flyers, brochures, or newsletters related to the project

These materials may be used by SECUF for promotional purposes, such as website content, social media posts, or marketing materials. By submitting these materials, the grantee acknowledges and grants permission to SECUF to use them in this way. If you have any questions or concerns about the use of these materials, please contact the grantor for further discussion.

Additional Comments:

Please provide any additional comments or feedback on the grant program or application process.

By signing below, I confirm that all information provided in this report is accurate and complete.

Name: _____

Title: _____

Date: _____