



Community Impact Grant Application

Organization Name: _____

Organization Address: _____

Contact Person: _____

Contact Phone: _____

Contact Email: _____

Project Title: _____

Area of Funding:

- Financial Wellness and Education
- Community Development Financial Institute (CDFI) Application Support
- Community Development Financial Institute (CDFI) Grant Writing Support

Project Summary: Please provide a brief summary of the project, including its goals and objectives. (Maximum 500 words)

Project Description: Please provide a detailed description of the project, including how it aligns with one of the funding areas and its related objectives, as outlined in the Funding Priorities. (Maximum 1000 words)

Organizational Capacity: Please provide information on your organization's capacity to successfully deliver quality programming and meet established project goals, including your experience and qualifications in the proposed project area. (Maximum 500 words)



Community Impact Grant Application

Project Need: Please describe the need for the project being proposed and how it will address barriers to the well-being and prosperity of credit union members and their communities. (Maximum 500 words)

Impact: Please describe how your project has the potential to create a positive impact on the community. (Maximum 500 words)

Budget: Please provide a detailed budget for the project, including all expenses and sources of funding. (Maximum 500 words)

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: _____

Grant Period: _____

Area of Funding:

- Financial Wellness and Education
- Community Development Financial
- Institute (CDFI) Application Support
- Community Development Financial
- Institute (CDFI) Grant Writing Support

Project Objectives: Please describe the objectives of your project and how they align with the funding area you applied for.

Project Activities: Please describe the activities undertaken during the grant period to achieve the project objectives.

Outreach: Describe the strategies and methods used to engage with the community and other stakeholders (e.g., community meetings, social media outreach, etc.).

Capacity Building: Describe any training, skill-building, or capacity-building activities that were implemented as part of the project.



Grant Report Form

Evaluation: Describe how the project was evaluated, including any metrics used to assess the effectiveness of the project activities.

Project Outcomes: Describe how the project was evaluated, including any metrics used to assess the effectiveness of the project activities.

Sustainability: Describe the sustainability of the project beyond the grant period, including any plans for continued funding, partnerships, or program expansion.

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. Additionally, describe how the credit union/chapter engaged with the partner organization and any challenges encountered during the partnership. Finally, discuss any plans to continue or expand the partnership beyond the grant period.

Challenges and Solutions: Please describe any challenges encountered during the project period and how they were addressed.



Grant Report Form

Budget: Please provide a detailed breakdown of expenses incurred during the grant period. Include all receipts or invoices.

Future Plans: Please describe any plans to continue or expand the project in the future, including any funding, partnerships, or program expansion.

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: _____