

*National Credit Union Administration
Office of Small Credit Union Initiatives
Community Development Revolving Loan Fund*

<h2 style="margin: 0;">Application</h2> <h3 style="margin: 0;">Financial Education and Financial Literacy Initiative -2011</h3>

1. CREDIT UNION NAME	
2. MAILING ADDRESS	
MAILING ADDRESS, CON'T	
3. CITY, STATE, ZIP	
4. CONTACT NAME/TITLE	
5. CONTACT PHONE NUMBER	
6. CREDIT UNION FAX NUMBER	
7. CREDIT UNION EMAIL ADDRESS	
8. CREDIT UNION CHARTER NUMBER	
9. CREDIT UNION EMPLOYER TAX ID NUMBER	
10. CREDIT UNION DUN AND BRADSTREET UNIVERSAL NUMBERING SYSTEM NUMBER	
11. AMOUNT REQUESTED	\$
12. NAME AND TITLE OF AUTHORIZED INDIVIDUAL	
13. SIGNATURE* AND DATE	

*By signing above, the credit union representative (1) is certifying that the credit union remains low-income designated, as defined in NCUA's Rules and Regulations; and (2) is committing the credit union to working toward the objectives of the CDRLF as described in the grant guidelines and the application.

Application Financial Education & Financial Literacy Initiative (2) - 2011

Before completing the application, please read
all instructions and guidelines carefully and thoroughly.

Description and Costs of the Project

1. Describe fully the financial education activity or project that the grant will cover. Include date(s) of activities, projected participants, length of project, and a description of the partner organization's role in the project.
2. In the table below, identify the total cost of implementing the project or undertaking the activity—including grant awards from NCUA, the credit union's own monies, grants from other partners, and all other funds provided to complete the project.

Total cost of the project	
NCUA grant:	\$
Other funds:	\$
Total Cost of Project	\$

Note: OSCUI considers the total dollars committed to the project, or leverage, when evaluating a grant application. Projects with higher leverage ratios will receive more favorable consideration. Leverage is described in the Grant Guidelines under the heading "How Are Grant Applications Evaluated?"

3. Provide an itemized list of the activities and purchases to be funded by the NCUA grant including vendors who will deliver the goods and/or services and the costs associated with each line item. Use format outlined below, listing items in order of most to least important.

Vendor Name	Item Description	Cost of Item
(1) <u>Example Company</u>	<u>1 Thing</u>	<u>\$ 500.00 (most important)</u>
(2) <u>Sample, Inc.</u>	<u>4 Things @ \$100.00</u>	<u>\$ 400.00 (least important)</u>

4. Please attach copies of bids, estimates, prices, and other supporting information for each entry from the itemized list.

Partner Organization

5. Provide the name, address, and, if available, website, of the partner organization. If the credit union is not established a partnership relationship, state, "none."
6. If applicable, attach a letter or statement on the partner organization's letterhead. The letter should indicate that the partner has agreed to take part in this project, and should explain the role of the partner organization in the project.

Note: OSCUI considers whether the credit union has developed other partner relationships and has considered other resources. Under this grant initiative, a credit union with a viable partner relationship will receive more favorable consideration. "Partnerships" is described in the Grant Guidelines under the heading "How Are Grant Applications Evaluated?"

Performance Measurement

7. Has the credit union conducted its "Due Diligence" and considered the ongoing costs of implementing the project, including, for example, total budget, time needed to break-even, staffing commitments, and alternative funding sources?

Yes.

No.

8. What is the impact of the proposed project? **SELECT ALL THAT APPLY.**
 - The project will add one or more financial education services
 - The project will allow the credit union to evaluate its financial education services
 - The project will add or improve financial education access in the larger community

9. Identify at least two quantifiable participant measures the credit union will track to assess the results of its financial education programs. For example,
 - Pre-education test scores and post-education test scores.
 - Credit scores pre-education, then ____ months later.
 - Total assets, liabilities, net worth, pre-education, then ____ months later.
 - Number of late payments prior to education, then 1 year later.
 - Other(s) (identify below including timeline for measurement).

10. Describe steps the credit union will take to ensure the participant measurements are tracked?

NATIONAL CREDIT UNION ADMINISTRATION
OFFICE OF SMALL CREDIT UNION INITIATIVES
1775 DUKE STREET
ALEXANDRIA, VIRGINIA 22314
(703) 518-6610

E-MAIL APPLICATIONS TO: OSCUIAPPS@NCUA.GOV

FAX APPLICATIONS TO: (703) 519 – 4088

**EMAIL OR FAX ONLY THE APPLICATION AND YOUR RESPONSES;
DO NOT SEND THE GUIDELINES.**