



PROFESSIONAL DEVELOPMENT FOR CHAPTERS AND SMALL CREDIT UNIONS GRANT APPLICATION INSTRUCTIONS

Please return the completed application and attachments by email to: Sue Ward-Diorio, Executive Director, CrossState Credit Union Foundation, at sward-diorio@crossstate.org.
Questions? Please call 717-839-2244

The intention of this grant program is to provide relevant training to chapters and small credit unions in order to pursue professional excellence for employees and leadership volunteers. Training and education has to be credit union relevant but does not have to be hosted by the credit union network of partners. A credit union/chapter may apply for one Professional Development grant per year. There is no application deadline; grants are accepted throughout the year.

Grant Types (See Section 2)

- Virtual Webinars
- CrossState Leadership School
- CUNA Management School
- Financial Counseling Certification Program (FiCEP)
- National Foundation's DE training
- Training relevant to credit unions

Eligibility

- Credit unions with assets less than \$50 million in assets may apply on behalf of employees or volunteers serving as board or committee members
- Pennsylvania and New Jersey credit union chapters

Application Materials

- Application signed by the credit union CEO (or board chair) or Chapter President
- Request Summary page
- Copy of registration or description of training, plus estimates for travel and lodging

Awards

- Grants for credit union staff or volunteers will cover the cost of registration, travel and lodging up to \$2,500. The credit union or individual must pay the remaining costs.
- Chapter grants may be used to offset the costs of training: cost of event minus registration revenue up to \$2,500.
- The maximum grant amount of Professional Development grant awards will not exceed \$2,500.
- A credit union may receive a maximum combined total of \$10,000 in Foundation funding per year across the grant *Categories* (Financial Literacy, Small Credit Union Assistance, Professional Development, Disaster Relief), but may not apply more than once each year per *Grant Type*.

Reporting

Within 90 days of the completion of the training program, the grantee must submit a summary of the training to the Foundation. The summary should include an overview of the training and the benefit(s) to the credit unions, staff, volunteers, and/or credit union members as a result of the training. Please include any receipts for lodging and travel (up to \$2,500) along with your summary report.

**PROFESSIONAL DEVELOPMENT
GRANT APPLICATION**

SECTION 1 – GENERAL INFORMATION

Name of Credit Union and/or Chapter _____

President/CEO/Manager Name _____

President/CEO/Manager Job Title _____

Address _____

Grant Contact's Name _____

Grant Contact's Job Title _____

Grant Contact's Telephone _____

Grant Contact's Email _____

Credit Union Applicant: Asset Size: _____ # of Members _____ # of Employees _____

Chapter Applicant: # of Members _____ # of Meetings per year _____ Average # of Attendees _____

Has your credit union/chapter applied for another Foundation grant this year? _____

SECTION 2 – TRAINING OR WEBINAR INFORMATION

What type of grant are you applying for? _____

Please attach a Request Summary by answering the following questions (see page 4):

- Explain why you are requesting this grant; what need is being addressed?
- What are the goals and objectives of this professional development opportunity?
- How is this training relevant to your position and/or assisting your members and/or community?

TRAINING/WEBINAR

Name of Training _____

Start and End Dates _____

In Person Venue or Virtual _____

Registration Cost per person: \$ _____ # of Registrants _____

Total Registration Cost (if more than one person): _____

Cost for Travel: _____ Cost for Lodging: _____

For Chapters:

Total cost of event minus registration revenue: _____

Attach registration and/or description of training. Can provide weblink.

Section 3 (Credit Unions Only) – ANALYSIS - Your Credit Union’s Financial Condition and Trends

Part 1: Financial Assessment of Credit Union

	YTD Current Year	Prior Year	Two Years Prior
Net Worth Ratio			
ROA			
Delinquency Ratio			
Charge Off Ratio			
Operating Expense/Asset Ratio			
Loan/Asset Ratio			
Loan Growth			
Asset Growth			
Membership Growth			

Part 2: If Net Worth Ratio is under 8 and/or ROA is negative for any of the three periods listed above, please explain how this will be addressed. If any other adverse or weak financial ratios or trends are shown, please explain how this grant will benefit your credit union members and positively impact these ratios or trends.

Section 4 - PRESIDENT / CEO / MANAGER / SIGNATURE

Total Grant Request \$ _____

Printed Name and Title _____

Signature _____

Date _____

GRANT CHECKLIST:

- Have you completed all information on this application?
- Have you attached a copy of the registration form or webinar(s) description?
- Has the credit union’s CEO or Chapter President signed this application?
- Have you included the Request Summary?
- If applicant is a credit union, have you completed Section 3 – Analysis?

REQUEST SUMMARY

- Explain why you are requesting this grant; what need is being addressed?

- What are the goals and objectives of this professional development opportunity? (Please make sure to provide anticipated numeric outcomes, ie, # of presentations to # of people, etc.)

- How is this training relevant to your position and/or assisting your members and/or community?
