

Northwest Corporate Legacy Grant Application

The Foundation's Northwest Corporate FCU Legacy Grants Program is designed to help all credit unions of Oregon with back-office efficiency, enhanced delivery systems, regulatory and compliance support, improved funds management processes, and professional development to improve the overall operations of the credit union. The following list provides examples of the types of projects that qualify for funding under the Northwest Corporate Legacy Grants Program. It is not inclusive.

- Funds Management
- Data Security
- Technology
- Professional Development
- Strategic Planning
- Regulatory/Compliance
- Joint Ventures or Partnerships

Grant Information

Eligibility and Guidelines

- Funding open to Oregon credit unions of all asset sizes.
- Projects must have clearly defined, measurable and achievable goals and objectives.
- Funds will be reimbursed by OCUF upon completion of the project and receipt of the required follow-up report.
- Funds are available up to \$2,500 per credit union in a 12-month period.

Grant Making Process

- Download and complete the OCUF grant application. Include complete project budget and other pertinent supporting documentation.
- Approval/denial of applications will be communicated with applicants within one week of OCUF Grants Committee review.
- Please address questions to Danielle Brown, OCUF Executive Director, at (800) 688-6098 ext. 221 or email at danielleb@cua.org.

Northwest Corporate Legacy Grant Applicant Information

CURRENT ASSET SIZE?		NAME OF CREDIT UNION	
NAME OF CEO/CHAIRMAN OF CREDIT UNION			
NAME OF CONTACT PERSON		TITLE OF CONTACT PERSON	
ADDRESS		CITY	STATE ZIP CODE
PHONE NUMBER	FAX NUMBER		EMAIL ADDRESS

Project Information

PROJECT		
PURPOSE AND GOAL OF NW CORPORATE LEGACY FUND GRANT REQUEST		
CONTRIBUTIONS OF FUNDS AND RESOURCES (OTHER THAN THE SUPPLYING VENDORS):		
EXPECTED PROJECT COMPLETION DATE	AMOUNT OF GRANT REQUESTED*	TOTAL AMOUNT OF PROJECT BUDGET

Additional Information Required

1. Has your credit union received a grant in the past 12 months? Yes No
2. How would you implement this project if you do not receive an OCUF NW Corporate Legacy Fund Grant?
3. Please provide the following that includes, but is not limited to:
 - **Purpose & Goal** - Provide a brief paragraph outlining key points of the project. If applicable, include measures of success.
 - **Description of the Proposed Project/Activity** - Include strategies for implementation of your project, anticipated length of the project, and how the project will improve or otherwise impact your credit union. Explain how this project correlates to the credit union's overall strategic plan.
 - **Recurring Expense** – Do you anticipate this being a recurring expense? If so, how do you anticipate handing it in future years?
 - **Marketing/Promotion of Project** – If applicable, please describe what methods will be used to promote this project and to promote the impact of the project on the community/credit union system.
 - **Project Budget** - Attach a detailed budget listing anticipated revenue, expenditures and total cost of project. Provide an itemized list of expenditures and the primary allocation areas. Include all other sources of income, including the OCUF grant. List in-kind contributions, volunteer hours donated, resources, etc. Include vendor only if they are providing support and/or resources at no or limited cost.

An Incomplete Application May Impact Your Ability To Qualify For Grant.

APPLICANT SIGNATURE	TITLE	DATE
CEO SIGNATURE		DATE

Send Completed Application With Attachment To:

Oregon Credit Union Foundation
 Attn: Grants Program
 P. O. Box 1900
 Beaverton, Oregon 97075
 (800) 688-6098, ext. 221
 Fax: (503) 644-7234