

2009 Desjardins Youth Financial Education Award CREDIT UNION Entry Form

Credit Union Name _____

Credit Union President _____

Contact Person _____

Title _____ E-mail Address _____

Address _____

City _____ State _____ Zip _____

Phone Number _____ Fax Number _____

P.O. Box (if applicable) _____ City _____ State ____ Zip _____

Category (assets as of 12/31/08)

- Less than \$35 million** in assets
 Between \$35 million and \$75 million in assets
 Between \$75 million and \$250 million in assets
 More than \$250 million in assets

Number of criteria to be used to judge entry (see "How does Desjardins scoring work?" in the credit union/chapter program FAQs*)

Three Four Five

- Submit materials in a three-ring binder or spiral bound notebook. (Entries will be returned no later than March 2010.)
- Submit the completed Credit Union Checklist (1) with this form (2) and your entry (3) to your league by the league's deadline.
- Present your best case for each of the following applicable criteria. Attach relevant supporting evidence directly after each criterion. (Ignore **Secrets of a Winning Credit Union-Chapter (Group) Entry** at your peril.)

Mandatory Criterion 1

Awareness and Teacher Training (20 points max.) Describe your credit union's best effort, with evidence of success, to:

- a) Inform teachers and school officials, credit union people, elected officials, the press, and the public about the problem of youth financial illiteracy,
- b) Persuade parents and schools to provide personal finance instruction,
- c) Assist in the training of teachers and/or classroom volunteers to teach personal finance to youth.

Mandatory Criterion 2

Youth Instruction (20 points max.) Describe your credit union's best effort, with evidence of success, to:

- a) Teach young people about personal finance and related topics in or out of the classroom,
- b) Assist young people in developing a savings habit and responsible money management skills through programs or events.

Mandatory Criterion 3

Collaboration (20 points max.) Describe your credit union's best effort, with evidence of success, to work with other organizations to provide youth financial education and financial literacy leadership.

OPTIONAL Criterion 4

In-School Branch(es) (20 points max.) Describe your credit union's best effort, with evidence of success, to provide financial services to young members at schools, youth centers, or other nontraditional locations.

OPTIONAL Criterion 5

Legislative & Regulatory Advocacy (20 points max.) Describe your credit union's best effort, with evidence of success, to build grassroots support for:

- a) Administrative policy or curricular changes at the state and district levels to improve the financial education of youth,
- b) Legislative or regulatory action to improve the financial education of youth.