

Desjardins ADULT Financial Education Award 2011 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 12/31/10)

- Less than \$50 million** in assets
- Between \$50 million and \$150 million** in assets
- Between \$150 million and \$500 million** in assets
- More than \$500 million** in assets

ENTRY INSTRUCTIONS

Submit the completed Credit Union Checklist (1) with this form (2) and your entry (3) to your league by the league's deadline.

Submit materials in a three-ring binder or spiral bound notebook, with tabs for the major sections—see Entry Format below. (Entries will be returned no later than March 2012.)

Your entry must address each of the three criteria described on page two. (See “How does Desjardins scoring work?” in the credit union/chapter program FAQs.)

IMPORTANT CHANGE FOR 2011: For **each criterion**, limit your submission as follows:

- **1-page narrative**, which judges will scrutinize.
- **Up to 5 pages** of primary evidence, which judges will read.
- **Optional appendix** of secondary exhibits, which judges will skim.

Present your best case for each of the three criteria, following the submission limits and entry format. Remember that excessive length and poor organization might hinder evaluation and consideration. (Ignore “Secrets of a Winning Credit Union Entry” at your peril.)

ENTRY FORMAT

1. **Adult Instruction** [tab]
1-page narrative
Up to 5 pages of primary evidence
2. **Awareness** [tab]
1-page narrative
Up to 5 pages of primary evidence
3. **Collaboration** [tab]
1-page narrative
Up to 5 pages of primary evidence
4. **Adult Instruction Exhibits** [tab]
5. **Awareness Exhibits** [tab]
6. **Collaboration Exhibits** [tab]

ENTRY CRITERIA

Mandatory Criterion 1

Adult Instruction (20 points max.) Describe your credit union's best effort, with evidence of success, in any of the following areas:

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

Mandatory Criterion 2

Awareness (20 points max.) Describe your credit union's best effort, with evidence of success, in any of the following areas:

- a) Inform employers, credit union people, elected officials, the press, and the public about the problem of adult financial illiteracy.
- b) Persuade local employers, service organizations, and technical schools to provide personal finance instruction for adults,

Mandatory Criterion 3

Collaboration (20 points max.) Describe your credit union's best effort, with evidence of success, in any of the following areas:

- a) Work with other organizations to provide adult financial education and financial literacy leadership.
- b) Assist in the training of instructors and volunteers to teach personal finance.