

strength in members.

New York Credit Union Impact Report Survey

New York Credit Union Association

Welcome to the New York Credit Union Impact Report Survey! We know credit unions across the state stepped up to assist their members and communities in 2020. This survey helps the New York Credit Union Association measure and quantify the community impact of New York's credit unions. Survey responses will be used to produce the 2021 New York Credit Union Impact Report.

Note: If a question requires an answer and you did not offer the initiative, please mark "0" in the field.

*** 1. What is your role at the credit union?**

- CEO
- Executive/management
- Staff
- Volunteer

*** 2. Your Full Name**

*** 3. Email Address**

*** 4. Credit Union Name**

*** 5. Is your credit union low-income designated?**

- Yes
- No

*** 6. Is your credit union a Community Development Financial Institution (CDFI)?**

- Yes
- No

*** 7. Do you have branches in areas where your credit union is the only or primary financial institution?**

Yes

No

*** 8. Which of the following services/products did your credit union provide to assist members specifically as a result of the COVID-19 pandemic? Please check all that apply.**

Interest-free loans

Special loan programs

Skip-a-pay

None of these initiatives

Reduced/eliminated fees

*** 9. Did your credit union offer Paycheck Protection Program loans in 2020?**

Yes

No

strength in members.

New York Credit Union Impact Report Survey

Paycheck Protection Program

10. **Approximately how many PPP loans did you make?**

11. **What was the total dollar amount for PPP loans your credit union made?**

strength in members.

New York Credit Union Impact Report Survey

Impact Overview

* 12. Which of the following initiatives did your credit union offer in 2020? Please select all that apply.

Note: Selecting "None of these initiatives" will take you to the end of the survey. Please only select this choice if you have no other information to share.

- | | |
|--|---|
| <input type="checkbox"/> Adult financial education or counseling | <input type="checkbox"/> Community investment & outreach |
| <input type="checkbox"/> Youth financial education | <input type="checkbox"/> Sustainability/environmental/green efforts |
| <input type="checkbox"/> Immigrant outreach | <input type="checkbox"/> None of these initiatives |

strength in members.

New York Credit Union Impact Report Survey

Financial Education & Financial Counseling

Note: If a question requires an answer and you did not offer the initiative, please mark "0" in the field.

* 13. In 2020, how many financial education and/or financial counseling sessions did your credit union provide to adults (members and non-members)?

* 14. Approximately how many adults (members and non-members) did you reach through financial education/counseling over the course of the year?

* 15. Does your credit union offer free financial counseling, either through the credit union or a third-party vendor/program?

Yes

No

* 16. In 2020, how many total financial education sessions did your credit union provide to children/teens younger than 18 (members and non-members)?

* 17. Approximately how many children/teens (members and non-members) did you reach through financial education sessions in 2020?

* 18. In how many schools did your credit union offer student banking programs in 2020?

Note: This does not include in-school branches, which are covered in the next question.

* 19. How many in-school branches did your credit union operate in 2020?

strength in members.

New York Credit Union Impact Report Survey

Immigrant Outreach

* 20. Please choose all that apply.

Our credit union...

- | | |
|---|--|
| <input type="checkbox"/> Provided educational workshops/sessions specifically for immigrant communities in 2020 | <input type="checkbox"/> Participated in partnerships or initiatives to engage immigrant communities in 2020 |
| <input type="checkbox"/> Employed bilingual staff to assist non-English-speaking members in 2020 | <input type="checkbox"/> Provided products or services geared specifically toward the immigrant community |
| <input type="checkbox"/> Provided non-English translations of member materials/communications such as product brochures, website, program information, etc. in 2020 | <input type="checkbox"/> Did not participate in any immigrant outreach in 2020 |

21. Please list any other immigrant outreach efforts your credit union undertook in 2020.

strength in members.

New York Credit Union Impact Report Survey

Community Investment & Outreach

Note: If a question requires an answer and you did not offer the initiative, please mark "0" in the field.

* 22. **How many charities or community organizations did your credit union support (either through monetary or in-kind donations, event sponsorships or event participation) in 2020?**

* 23. **Approximately how much money did your credit union raise or donate to local charities, community projects or organizations in 2020?**

* 24. **Approximately how many hours did your credit union spend volunteering or participating in community events in 2020?**

* 25. **How many college scholarships did your credit union award in 2020?**

* 26. **How much did your credit union provide in student scholarships in 2020? Please list a total dollar amount.**

strength in members.

New York Credit Union Impact Report Survey

Sustainability/Environment Efforts

*** 27. Which of the following sustainability initiatives did your credit union engage in or undertake in 2020? Check all that apply.**

- | | |
|--|--|
| <input type="checkbox"/> Reduced paper use | <input type="checkbox"/> Implemented sustainably travel guidelines |
| <input type="checkbox"/> Reduced energy use | <input type="checkbox"/> Achieved or worked toward carbon neutrality |
| <input type="checkbox"/> Developed a sustainability plan | <input type="checkbox"/> Did not participate in sustainability efforts |
| <input type="checkbox"/> Implemented energy-efficient lighting | |

28. Please list any other examples of your credit union's sustainability efforts.

29. Thank you for participating in the Impact Report Survey! Please click the "done" button below before exiting. You can also complete the optional question below.

Optional: Please provide details on your credit union's top three impact/outreach initiatives in 2020.