



OHIO CREDIT  
UNION  
FOUNDATION

## FINANCIAL EDUCATION GRANT RESULTS REPORT

Following your project, program, or event please complete each section in this report and an itemized list of expenses, attach all expense receipts, and forward to:

Ohio Credit Union Foundation  
10 West Broad St., Suite 1100  
Columbus, OH 43215

**The completed report, itemized list of expenses, and expense receipts must be provided to OCUF before reimbursement will be made. This information is necessary for the Foundation's reporting to investors and contributors, to auditors, and for the continued promotion of the Ohio Credit Union Foundation.**

**Failure to properly complete this report in full may result in a delay of payment.**

### CREDIT UNION INFORMATION

Credit Union \_\_\_\_\_

Project Contact \_\_\_\_\_

Contact Phone Number \_\_\_\_\_ Email \_\_\_\_\_

### GRANT INFORMATION

Grant Dollars Awarded \_\_\_\_\_ Grant Dollars Used \_\_\_\_\_

Date(s) & Name of Project/ Event/Professional Development Experience \_\_\_\_\_

Purpose of Grant \_\_\_\_\_

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**I. NARRATIVE** (maximum of 4 pages, exclusive of attachments)

**All responses may be used in future OCUF marketing & promotional materials.**

**A. Results/Outcomes**

1. Describe the progress made toward the stated goals and objectives related to this specific grant. (Please include the goals and objectives in your response, and note objectives that were not fulfilled and the reasons why.)
2. Explain how you measured the success of the project, program, or event, and what difference the grant made in your community and for your members. Please discuss evidence of effect (e.g. numbers served, demographic information, survey results, community indicators, outcomes, etc.).
3. Were there any unanticipated results, either positive or negative, that you have not already described in A-2 above? If yes, please describe the implications.
4. Describe collaborations, if any, related to the work funded by this grant and how it impacted your efforts.
5. What did this OCUF grant and project, program, or event mean to you personally?
6. Provide comments from program participants and partners that support the results explained above.

**B. Lessons Learned**

1. Describe what you learned based on the results/outcomes you reported in Section A above and what, if any, programmatic or organizational changes you will make based on your results/outcomes.
2. Did external or environmental factors (e.g. weather, the economy, a partner organization stopped providing services, etc.) affect the achievement of your program or organizational goals or the anticipated timeline? If yes, what did you do to address these issues?

**C. Future Plans**

1. If you will plan to continue/repeat the project, program or event, what are the plans for sustaining or expanding the program, including a future-funding plan? If you will not continue/repeat the program, what factors led to this decision?
2. What plans do you have to communicate your outcomes and lessons learned with others?
3. If you have identified areas where increased collaboration between organizations would lead to increased positive outcomes for your members and community, briefly describe your ideas.

**II. FINANCIALS**

Submit a final project budget that is supported by receipts and other relevant accounting documents. If permission was given for spending variances, please highlight and explain.

**III. PICTURES**

Please e-mail photos of your professional development experience to Outreach Manager Laura Busque at [lbusque@ohiocul.org](mailto:lbusque@ohiocul.org). *(These may be used in future OCUF marketing & promotional materials.)*