

# Small CU Business Model Assessment Form

**Credit Union Name:**

**Charter Number:**

<b><i>Areas:</i></b>	<b><i>Assistance/ Guidance Needed:</i></b>
Member base: Number of Members: Potential Members:	
Member characteristics: Charter FOM Type:	
Staff (Number): Training:	
Volunteers (Number): BOD: S/C: Others: Training:	
Foreign transactions:	
Data Processor: Type (name): Date Contract Ends: Like/Don't Like:	
Electronic banking:	
Products and Services: Loans:	

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Shares:  Services:	
Branches: Drive Thru: Digital Response:	
Marketing: Web-Site: How many "hits" per month: Apps: Social Media: Other:	
Community Interactions: Member Interactions: Net Working Opportunities: Number of Strategic Partnerships/Collaborations:	
Net Worth: Net Worth Ratio: Loan to Share Ratio: ROA Ratio:	
ALLL: Budgeting: Strategic Planning: Collections: Loan Review: Asset Growth: Compliance: Others: Audits: Examination Report:	

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## ***Management Questions:***

- 1. What would help you manage your credit union better?**
  
  
  
  
  
  
  
  
  
  
- 2. What is the most pressing need facing your credit union today?**
  
  
  
  
  
  
  
  
  
  
- 3. How can the Federation work with you to support your CDCU?**
  
  
  
  
  
  
  
  
  
  
- 4. Name 3 things that would make your job at the CDCU easier?**

***ADDITIONAL COMMENTS/SUGGESTIONS/THOUGHTS (Please Print):***