

Section II. OSCUI as a Consulting Organization

1. In the past, our credit union has used consulting services (i.e., economic development specialists) from OSCUI.
a. Yes. b. No. (If “Yes” go to questions below, if “No” go to next section.)

2. OSCUI’s assistance was tailored to our specific needs.
1= Far Exceeded Expectations, 3 = Met Expectations, 5 = Far Below Expectations

3. OSCUI listened carefully and consistently to our concerns before making recommendations.
1= Far Exceeded Expectations, 3 = Met Expectations, 5 = Far Below Expectations

4. OSCUI was attentive to our needs during the consultation.
1= Far Exceeded Expectations, 3 = Met Expectations, 5 = Far Below Expectations

5. How would you rate OSCUI compared to other consultants the credit union has hired to conduct similar work?
1= Much Better, 3 = About the Same, 5 = Much Worse, 0 = Not Applicable

6. Overall, the services provided by OSCUI consultants:
1= Far Exceeded Expectations, 3 = Met Expectations, 5 = Far Below Expectations

7. To strengthen its consulting services OSCUI should_____. (open ended question)

8. Did your credit union implement the changes recommended in the consultation?
a. Yes. B. No. (If “No” why not?)

Section III. OSCUI as a Donor or Lender (i.e., grants and loans)

1. In the past, our credit union has received a grant or loan from OSCUI.
 - a. Yes.
 - b. No. (If “Yes” go to questions below, if “No” go to next section.)

2. The *grant(s) initiative* provided by OSCUI met our local context and needs.
1= Far Exceeded Expectations, 3 = Met Expectations, 5 = Far Below Expectations

3. The grant provided was sufficient to implement the planned program/service.
1 = Completely Agree, 2= Somewhat Agree, 3= Neither Agree nor Disagree,
4 = Somewhat Disagree, 5 = Completely Disagree, 6= Unsure 7= Not applicable

4. The *loan(s)* provided by OSCUI met our local context and needs.
1= Far Exceeded Expectations, 3 = Met Expectations, 5 = Far Below Expectations

5. The *loan(s)* terms were sufficient to implement a new service or create change in the institution.
1 = Completely Agree, 2= Somewhat Agree, 3= Neither Agree nor Disagree,
4 = Somewhat Disagree, 5 = Completely Disagree, 6= Unsure 7= Not applicable

6. Did your credit union implement the program/service which you received the loan or grant for?
 - a. Yes.
 - B. No. (If “No” why not?)

Section IV. OSCUI as a Trainer

1. In the past, our credit union has attended an **in-person** OSCUI training program(s).
 - a. Yes
 - b. No. (If “No” go to question #6.)

2. In the past, our credit union has attended an **on-line** OSCUI training program(s) or webinar.
 - a. Yes
 - b. No. (If “No” go to question #6.)

3. The quality of the training programs provided by OSCUI:
1= Far Exceeded Expectations, 3 = Met Expectations, 5 = Far Below Expectations

4. Assuming the same content, if OSCUI’s training programs were only offered via distance learning platforms (e.g., webinars, on-line self-paced, videos, etc.) how likely would you be to attend compared to now?
1=Much more likely 3=The same as now 5=Much less likely

5. Has information obtained during OSCUI trainings/workshops been used to positively bring about change in the credit union?
 - a. Yes.
 - b. No. (If “No” why not?)

6. Our credit union has not attended training because (Choose all that apply):
 - a. Limited budget for travel (in-person)
 - b. Limited staff to attend
 - c. Not aware of training offered
 - d. Topics not relevant
 - e. Inconvenient times or schedule (on-line)
 - f. Other _____

Section V. OSCUI Facilitating Partnerships and Outreach

1. In the past, our credit union has used partnership and outreach resources from OSCUI (i.e., OSCUI website, FOCUS e-newsletter, and information on external resources or FAQ+ online search function).
 - a. Yes
 - b. No.
 (If “Yes” go to questions below, if “No” go to question #6.)

2. The partnership informational resources and outreach support from OSCUI have:
 1= Far Exceeded Expectations, 3 = Met Expectations, 5 = Far Below Expectations

3. Has your credit union used OSCUI resources to bring about change in the credit union?
 - a. Yes
 - b. No. (If “No”, why not?)

Section VI. About Your Credit Union

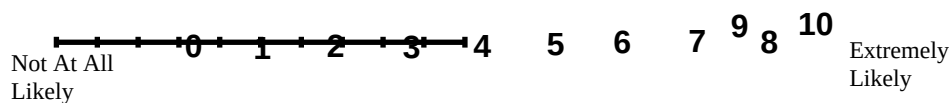
1. Our credit union’s biggest challenge is: **(Choose only one)**:
 - a. Net Worth Restoration Planning
 - b. Budget Guidance
 - c. Consumer Compliance
 - d. FOM Expansion
 - e. Internal Control Guidance
 - f. Marketing Strategy
 - g. Merger Guidance
 - h. New Product/Service Development
 - i. Recordkeeping
 - j. Secondary Capital
 - k. Strategic Planning

1. Board / Succession management

2. What are the key success drivers that move a credit union from stagnation in deposits, loans, and/or membership to growth?
- a. Expanding its field of membership and growing members
 - b. Growing the deposit base
 - c. Introducing new fees
 - d. Introducing new loans
 - e. Adding staff
 - f. Grants
 - g. Other: _____
3. Why don't some eligible credit unions pursue the low-income designation?
- a. The communication is unclear regarding what needs to be done
 - b. There is a stigma attached to LID designation
 - c. Some credit unions do not understand the designation or its benefits
 - d. Credit unions perceive the LID designation will not bring practical benefits
 - e. Other: _____

Section VII. The Future

1. In the future your credit union's demand for OSCUI services will be:
(1= Much More, 3 = About the Same, 5= Much Less)
2. OSCUI should measure the impact of its work with credit unions through:
- a. Survey evaluations conducted after trainings, consulting engagements, loans/grants and partnerships
 - b. Comparing the financial health of the credit unions it serves to similar peer credit unions that it does not serve
 - c. The sustainability of all small and low-income credit unions
 - d. What OSCUI is doing is working, don't change it
 - e. Other: _____
3. How likely is your credit union to use OSCUI's services?
(1=Much more likely 3= The same as now 5= Much less likely)
4. On the scale of 0-10 how likely are you to recommend that another credit union use OSCUI's services?



5. How should OSCUI measure its own success? (open ended question)

6. OSCUI should allocate more resources to? (open ended question)

7. OSCUI should allocate fewer resources to? (open ended question)

8. Is there anything else you would like to mention about OSCUI that has not been covered?
(open ended question)