

Screen shot explanations:

Below you will find screenshots of five sections of the questionnaire – the cover page, section 1, section 2.D, section 2.E, and section 4. For section 2, specifically, we included screenshots of questions in which there are sub-items (see section 2.D1) and questions in which there are single items (see section 2.E) in the matrices. These are included to display how the survey was adapted and programmed based on the original template Word document to maximize clarity and consistency. We have also included a screenshot of the mobile view (see section 4) to show how it will appear for those taking the survey on their mobile device.



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National Credit Union Administration



Reporting Year 2023
OMB #3133-0193

Annual Voluntary Credit Union Diversity Self-Assessment

Best Practices for Demonstrating a Commitment to Diversity and Inclusion

The National Credit Union Association's (NCUA) Office of Minority Women Inclusion (OMWI) is currently conducting their voluntary Credit Union Diversity Self-Assessment (CUDSA) survey, and you are invited to participate. The CUDSA survey is a voluntary, annual assessment conducted in order to find out more information about your Credit Union's diversity, equity, and inclusion (DEI) policies and practices. The NCUA's OMWI utilizes the results of the assessment to understand and evaluate the DEI standards as they relate to the credit union industry. For additional information, please contact privacy@ncua.gov.

The NCUA's contractor for the administration of the CUDSA survey, Optimal Solutions Group (Optimal), will securely collect and store your responses to this survey. Your participation in this survey is completely voluntary. You have the right to not participate. You can stop participating at any time and you do not have to answer any questions that you do not want to. The NCUA will never receive updates of your credit union's participation or non-participation from Optimal, nor any survey data that identifies your credit union. The estimated burden for completing this survey is approximately **60-90 minutes**. For any technical issues, please email CUDSA_survey@optimalsolutionsgroup.com.

Any information provided in this survey will be kept strictly confidential. In the context of this survey, confidentiality is defined to mean that no respondent will be identified or named in any publicly available report or other such publication without their prior permission. Your personal information will be protected to the extent permitted by law, including the Privacy Act of 1974 and the Freedom of Information Act (FOIA). In addition, to the extent permitted under FOIA, confidential business information will not be disclosed to parties outside of the NCUA and its contractors. The survey data will be retained by NCUA contractors for no fewer than 3 years after the completion of the surveys and will not be used for purposes outside of NCUA contracts during or after that period.

The NCUA thanks you for your willingness to participate!

Proceed with the survey

Do not proceed with the survey

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Section 1 – Credit Union Information



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Section I – Credit Union Information

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Credit Union Name/Charter or Insurance Certificate Number

Enter Credit Union Name/Charter or Insurance Certificate Number

OR

Find My Credit Union by State

State

Credit Union

Total Number of Employees

Enter Total Number of Employees

Total Members

Total Members

Total Assets (\$)

Total Assets

Phone

Phone

Website

Website

Section 2 – Self-Assessment Part D1



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Section II – Self-Assessment

D - Practice to Promote Transparency of Organizational Diversity and Inclusion (D1)

Transparency and communications are essential aspects of assessing diversity policies and practices. Transparency does not require you to share confidential or proprietary information. Credit unions can communicate information about their diversity and inclusion efforts through normal business methods, such as displaying information on websites, on appropriate promotional materials, and in annual reports to members.

By communicating your commitment and plans for achieving diversity and inclusion and the metrics to measure success in workplace and supplier diversity, you inform a broad constituency of current and potential members, employees, suppliers and the general community about your efforts to promote diversity and inclusion. The publication of this information can make new markets accessible for minorities, women, and other diverse groups, and illustrate the progress made toward an important business goal. Following are some ways to promote transparency of your credit union's diversity and inclusion efforts.

In a manner reflective of our size and other characteristics, our credit union:

D1 - Periodically publishes information about our efforts to enhance diversity and inclusion, which may include:

Please email CUDiversity@NCUA.GOV a sample or share a hyperlink below if appropriate.

	Yes	Comments
D1a - Demographic information on workforce composition (such as that found on an annual EEOC report).	<input type="checkbox"/>	<input type="text"/>
D1b - Demographic information on supplier diversity (contracting activities).	<input type="checkbox"/>	<input type="text"/>
D1c - Demographic information on the board members and other officials.	<input type="checkbox"/>	<input type="text"/>
D1d - Information on sponsorships or partnerships with diverse organizations.	<input type="checkbox"/>	<input type="text"/>
D1e - Other information on our diversity and inclusion efforts.	<input type="checkbox"/>	<input type="text"/>

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Section 2 – Self-Assessment Part E



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Section II – Self-Assessment

E - Self-Assessment

Credit unions with successful diversity policies and practices allocate time and resources to monitor and evaluate performance of diversity policies and practices on an ongoing basis. The NCUA encourages credit unions to disclose their diversity policies and practices and related information to both the NCUA and the public.

In a manner reflective of our size and other characteristics, our credit union:

	Yes	Comments
E1 - Conducts a self-assessment or evaluation of our diversity policies and practices annually.	<input type="checkbox"/>	<input type="text"/>
E2 - Modifies our diversity policies and practices based on the results of the self-assessment or evaluation of our diversity policies and practices.	<input type="checkbox"/>	<input type="text"/>
E3 - Provides information pertaining to the self-assessment or evaluation of our diversity policies and practices to the NCUA's OMWI director annually.	<input type="checkbox"/>	<input type="text"/>
E4 - Publishes information pertaining to our assessment of our diversity policies and practices.	<input type="checkbox"/>	<input type="text"/>

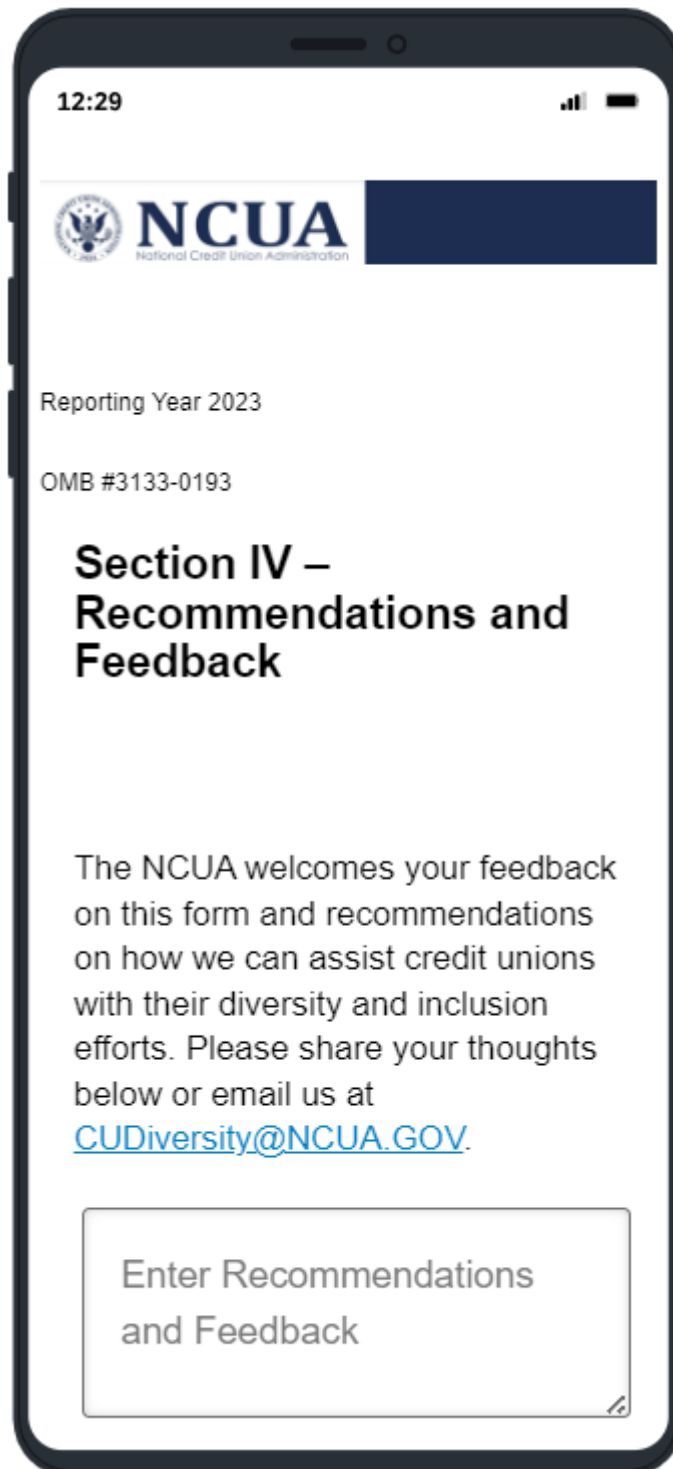
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For any technical issues, please email CUDSA_survey@optimalsolutionsgroup.com.

Mobile view of Section IV – Recommendations and Feedback

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Section IV – Recommendations and Feedback

The NCUA welcomes your feedback on this form and recommendations on how we can assist credit unions with their diversity and inclusion efforts. Please share your thoughts below or email us at CUDiversity@NCUA.GOV.

Enter Recommendations
and Feedback