



Annual Voluntary Credit Union Diversity Self-Assessment Instructions

Best Practices for Demonstrating a Commitment to Diversity and Inclusion

NCUA form 15004, OMB #3133-0193

Section I – Credit Union Information

- Enter credit union name, charter, or insurance certificate number. Alternatively, use the “Find My Credit Union by State” option to find and populate your credit union’s official name and charter or insurance certificate number.
- Enter your credit union’s total number of employees. The other information in the shaded boxes will automatically populate with information from the most recently completed Call Report.
- Enter a brief description of your credit union in the space provided.
- Complete the Business Contact Information chart by entering the credit union point of contact for this self-assessment. Enter the information requested in the other two columns or check the appropriate box to prepopulate the information.

Section II – Self-Assessment

- Check the “yes” box for each item that applies to your credit union. If an item is not applicable, you do not need to do anything. You may enter comments regardless of whether you check the “yes” box.
- In some cases, you will be prompted to share a hyperlink or email information to us. This is optional. You may submit the self-assessment without sharing hyperlinks or emailing any additional information to us.

Section III – Diversity Data (optional information)

- Complete the Workforce Profile chart. The information requested on this chart uses the same categories for race and ethnicity that the EEOC adopted for the EEO-1 Report.
- Complete the Procurement-Supplier Diversity chart. The percentage fields will populate automatically.

Section IV – Recommendations and Feedback (optional information)

- Share your feedback on the self-assessment form and recommendations on how the NCUA’s Office of Minority and Women Inclusion can assist credit unions with their diversity and inclusion efforts.

Submitting and Saving


I want to save **ONLY**
(will not submit)

You may save the form and return to it later by selecting the “Save as Draft” button, which will generate an email to the point of contact and the CU CEO containing a link to return to your saved information. The link will remain active until you submit the form or until December 31.


I'm done and ready to
Submit!

To submit the self-assessment select the “Submit” button. The designated point of contact and the CU CEO will receive email confirmation of your submission along with an EXCEL version of your self-assessment for your records. You may also submit the self-assessment via email to CUDiversity@NCUA.gov; Fax to (703) 518-6685; or mail to the Office of Minority and Women Inclusion, National Credit Union Administration, 1775 Duke Street, Alexandria VA 22314.

Contact CUDiversity@NCUA.gov with questions regarding this self-assessment.