

Callahan Impact Metrics: Data Dictionary

Category	Subcategory	Act. Code	Field Name	Format	Notes
The "Impact on Employees" section is intended to measure how your credit union has an impact on the financial wellness and upward mobility of your employees.					
Impact on Employees	Living Wage	i100	What is your minimum starting hourly wage for entry level, front-line employees?	\$___/hour	Entry level, front line employees may include but are not limited to branch staff, maintenance crews etc.
Impact on Employees	401(k) Benefits	i101a	What % of your employees participate in your 401(k)?	%	Please include FTEs only
Impact on Employees	401(k) Benefits	i101b	Up to what % of income did you match employee 401(k) contributions in 2020?	%	If you do not match, please put 0%
Impact on Employees	Career Advancement	i102a	What % of non-entry level open positions were filled by existing employees in 2020?	%	
Impact on Employees	Career Advancement	i102b	Do you offer tuition reimbursement?	Yes/No or 1/0	Please do not include tuition paid as part of work-sponsored development
Impact on Employees	Career Advancement	i102c	If yes, total \$ contributed to tuition reimbursement.	\$	Please do not include tuition paid as part of work-sponsored development
Impact on Employees	Career Advancement	i103a	Do you match charitable donations funded by employees?	Yes/No or 1/0	
Impact on Employees	Career Advancement	i103b	If yes, total \$ contributed to match employee donations?	\$	
Impact on Employees	Volunteer Support	i104a	Do you offer volunteer time off?	Yes/No or 1/0	Volunteer time off is defined as work hours allocated to volunteering and paid by the credit union as a normal workday.
Impact on Employees	Volunteer Support	i104b	How many paid hours of volunteer service were given by your employees in 2020?	#	

Impact on Employees	Volunteer Support	i104c	Other ways you support employee giving.	Text	
Impact on Employees	DEI	i105	Does your credit union currently have, or are you currently developing, a formal DEI Initiative?	Yes/No or 1/0	
The "Impact on Members" section is intended to measure how your credit union has an impact on the lives of your members in several areas including financial wellness, home ownership and options in time of crisis. (We have intentionally left out the products and services reported on the NCUA Credit Union Profile Form.)					
Impact on Members	Emergency Savings	i106a	What % of members 18 or older held at least \$400 in checking and regular savings deposits as of December 31, 2020?	%	
Impact on Members	Emergency Savings	i106b	Do you have a reverse tier savings account?	Yes/No or 1/0	
Impact on Members	Emergency Savings	i106c	If Yes, what is the yield on the lowest savings tier/smallest balances?	%	
Impact on Members	Emergency Savings	i106d	If Yes, what is the maximum amount that can receive this yield?	\$	
Impact on Members	Emergency Savings	i106e	If Yes, what is the total amount deposited in these accounts?	\$	
Impact on Members	Home Ownership	i107a	Do you track mortgages originated to first-time homebuyers?	Yes/No or 1/0	Please select "NA" if your credit union does not provide mortgages.
Impact on Members	Home Ownership	i107b	How many first mortgage loans were funded for first-time homebuyers in 2020?	#	If you do not track, please enter "NA"
Impact on Members	Home Ownership	i107c	What is the dollar amount of first mortgage loans funded for first-time homebuyers in 2020?	\$	If you do not track, please enter "NA"

Impact on Members	Financial Management	i108	Do you provide members with free access to their credit score?	Yes/No or 1/0	
Impact on Members	Environment	i109a	Have you offered special loan programs for members impacted by natural disasters, COVID, government shutdowns, or other emergencies?	Yes/No or 1/0	
Impact on Members	Environment	i109b	Do you offer targeted loans to improve the energy efficiency of homes?	Yes/No or 1/0	For example, loans for solar panels
Impact on Members	Environment	i109c	Do you provide incentives or special loan program for hybrid or electric cars?	Yes/No or 1/0	
Impact on Members	Citizenship	i110	Do you serve members without a social security number?	Yes/No or 1/0	Do you provide access to financial services for nonmembers who otherwise might not be served by a traditional financial institution?"
Impact on Members	Other	i111	Are there other unique member programs you would like to highlight?	Text	
The "Community Impact" section is intended to measure how your credit union has an impact on the physical community your credit union serves. For this section, we ask that you define "community" as the geographical footprint where your members live and work.					
Community Impact	Economic Development	i112	What is the \$ amount of business loans funded in underserved areas in 2020?	\$	<p>"Underserved" can be defined multiple ways. In this case, we are referring to the CFPB definition of underserved areas.</p> <p>"Commercial loans" can be defined multiple ways. In this case, we are defining commercial loans as loans directly to small businesses.</p>

					If you prefer to use other definitions, we would love to hear more, please let us know by emailing analystsupport@callahan.com
Community Impact	Foundation	i113	Do you have a charitable foundation?	Yes/No or 1/0	
Community Impact	Foundation	i113a	Foundation Name	Text	
Community Impact	Foundation	i113b	Foundation URL	Text	
Community Impact	Foundation	i113c	What was the value of scholarships, grants, and other charitable gifts and donations the foundation granted 2020?	\$	Please only include donations made by your foundation and not your credit union.
Community Impact	CU Contributions	i114a	What was the total contribution your credit union made to Your Foundation?	\$	Please only include donations made by your credit union not your foundation
Community Impact	CU Contributions	i114b	What was the total contribution your credit union made to Children's Miracle Network	\$	
Community Impact	CU Contributions	i114c	What was the total contribution your credit union made to national organizations	\$	
Community Impact	CU Contributions	i114d	What was the total contribution your credit union made to local/community organizations	\$	Please only include donations made by your credit union not your foundation. "Local/Community" refers to the physical geography of a community. We ask that you apply whatever geographical definition that makes sense for your credit union.

Community Impact	CU Contributions	i114e	What was the value of scholarships, grants, and other charitable gifts and donations given in 2020 to the community by your credit union?	\$	Please only include donations made by the credit union not the foundation. This total includes but is not limited to the values you input for i114a-d,
Community Impact	CU Contributions	i114f	Do you prioritize specific needs in the communities you serve? If so, which ones?	Text	Please tell us if most of your community impact efforts pertain to a specific cause like low-cost housing, SBA support etc.
Community Impact	Impact Report	i115a	Do you produce an annual impact report?	Yes/No or 1/0	Please only answer "yes" if you have a separate impact report. Please answer "no" if you do not produce an impact report, or you include community impact reporting in your Annual Report.
Community Impact	Impact Report	i115b	What is the URL of your impact report?	Text	
The "Environmental Impact" section is intended to measure how your credit union has an impact on the environment in and around the community you serve. For this section, we ask that you define "community" as the geographical footprint where your members live and work.					
Environmental Impact	Products and Services	i116a	Do you operate any LEED certified facilities?	Yes/No or 1/0	
Environmental Impact	Products and Services	i116b	Do you participate in carbon offsets for your credit union?	Yes/No or 1/0	
Environmental Impact	Products and Services	i116c	Other products and services geared towards environmental impact:	Text	
Environmental Impact	Institutional Footprint	i117a	Do you currently make any explicit efforts to track your credit union's environmental footprint?	Yes/No or 1/0	
Environmental Impact	Institutional Footprint	i117b	If yes, what metrics are you tracking?	Text	
Environmental Impact	Institutional Footprint	i117c	If no, are you considering doing so within the next year?	Yes/No or 1/0	

Last Updated: April 16, 2021