

CDFI Technical Assistance (TA) Grant Readiness Checklist

*Designed to help small and emerging credit unions build capacity rather than deploy capital.
The TA Grant is the best entry point for institutions new to CDFI funding.*

Basic Requirements

- Have (or plan to become certified after receiving the TA award) CDFI certification - emerging CDFIs can apply if they commit to becoming certified.
 - Register in SAM.gov and obtain a valid UEI.
 - Create an AMIS account with the CDFI Fund.
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Organizational Readiness

- Ability to describe your credit union's members and the communities you serve.
 - Board and leadership that reflect your target market.
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TA Grant Uses (Eligible Activities)

TA awards can be used for:

- Hiring staff (loan officers, compliance, community outreach).
- Staff training or professional development.
- Technology upgrades (core systems, lending platforms, member access tools).

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- Product development (designing new loan or savings programs).
 - Strategic planning or market studies.
 - Translation or outreach materials to better serve your members.
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Narrative Preparation

- Can you explain how TA funds will help your credit union build capacity?
 - Do you have a simple work plan for how funds will be spent?
 - Can you connect capacity investments (staff, systems, training) back to your community impact?
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If you can check these boxes, you're ready to apply for a TA Grant.

And if you don't check all the boxes yet, CUwise will help you get there.