



To be considered for the Juntos Avanzamos designation, credit unions must demonstrate a strong and measurable commitment to serving Hispanic and immigrant communities through inclusive policies, culturally relevant practices, and accessible financial products.

ELIGIBILITY & REQUIREMENTS

Who is eligible to apply?

Credit unions are eligible if they:

- Are federally or state-chartered and located in the United States or Puerto Rico.
- Are active Inclusiv members.
- Provide bilingual (English/Spanish) service capabilities.
- Offer at least one accessible deposit product and one accessible loan product for Hispanic and immigrant members.
- Provide bilingual financial education or empowerment services.

What criteria are used to determine designation?

Applicants must show:

- Hispanic representation among board, leadership, and front-line staff.
- A mission and strategy that intentionally support Hispanic and immigrant communities.
- Bilingual member service, marketing, and brand visibility.
- Accessible financial products and services such as flexible identification options.
- Cultural relevance in financial education, outreach, and community partnerships.

APPLICATION PLATFORM PROCESS

How do I use Submittable to apply?

- Create a free Submittable account or sign in with Google or Facebook.
- You may save drafts and return later—your work is saved automatically.
- Submittable works best on Chrome, Firefox, or Safari. (Internet Explorer is not supported.)
- You will receive email updates—please safelist emails from: notifications@email.submittable.com

How long will the application take?

On average, applicants need approximately 2 hours to complete the form. You may complete it over multiple sessions.

Can more than one person work on the application?

Yes. You can invite collaborators:

- Click Invite Collaborators within the form.
- Enter their email addresses.
- Collaborators must accept the invitation before you submit it.
- The submission owner can remove or add collaborators at any time before submission.

Can I edit my application after I submit it?

No. Once the application is submitted, you cannot make changes. Please review carefully before submitting.

Will I receive confirmation after submitting it?

Yes. You will receive an automated confirmation email. If you do not see it, check your spam folder and confirm that Submittable emails are safe listed.

Who can I contact for technical assistance?

Please visit the Submitter Resource Center or contact Submittable Customer Support.

APPLICATION CONTENT

The Juntos Avanzamos application is organized into 5 key sections. Credit unions are encouraged to respond to each section thoughtfully and thoroughly, using both narrative descriptions and supporting documentation to demonstrate their commitment to serving Hispanic and immigrant communities.

- Credit Union Profile
- Hispanic and Bilingual Representation
- Demonstrated Commitment to Serving Hispanic and Immigrant Communities
- Marketing and Communications
- Products and Services

What is included in the credit union profile section?

This section captures foundational information about your institution, such as:

- Asset size
- Number of branches
- Total staff and board members
- Field of membership
- Mission and Vision statement

These details help illustrate your institution's size, reach, and strategic purpose.

What information is required in the Hispanic and bilingual representation section?

This section assesses your institution's cultural and language capacity to serve Hispanic and immigrant members effectively. You will report:

- Percentage of Hispanic board members
- Hispanic representation in leadership and front-line positions
- Bilingual representation across board, leadership, and member-facing staff

This data helps us understand your operational readiness to engage diverse communities.

What information is required in the Demonstrated Commitment to Serving Hispanic and Immigrant Communities section?

This section is a core part of the application. You will describe:

- The demographics and financial needs of the Hispanic community in your service area
- Documented strategies and measurable benchmarks within your strategic plan
- Inclusive internal policies and practices (e.g., flexible ID policies, cultural training)
- Existing partnerships with nonprofits, consulates, community groups, and immigrant-serving organizations

Your responses should show intentional, sustained efforts to expand access and reduce systemic barriers.

What information is required in the Marketing and Communications section?

In this section you will provide examples of how your credit union communicates in a culturally relevant and bilingual manner, including:

- Signage, website, app content, and member-facing materials available in English and Spanish
- Marketing campaigns tailored to Hispanic communities

Please upload supporting materials that provide evidence of this work.

Examples may include website links, PDF flyers, event photographs, and other marketing or outreach material, demonstrating your commitment to serving members in linguistically and culturally relevant ways.

What information is required in the Products and Services section?

In this section you will describe:

- Financial products and services offered to Hispanic and immigrant consumers
- Policies that make products accessible (alternative IDs, flexible underwriting, etc.)
- Inclusive pricing or lending models
- Documentation showing product usage and community impact

These details help demonstrate your institution's role in expanding financial inclusion.

Do we need to describe our financial education and inclusion programs?

Yes. You should outline:

- Workshops, financial coaching, counseling, or outreach efforts
- Programs specifically supporting Hispanic and immigrant communities
- Measurable outcomes, if available

This helps demonstrate your broader commitment beyond products and services.

How long does it take to complete the full application?

Completion time varies by institution.

Is being an Inclusiv member required to apply?

Yes. Active Inclusiv membership is a core requirement for the Juntos Avanzamos designation.

Is there an additional cost to submit the Juntos Avanzamos designation application?

No. There is no additional cost to submit the Juntos Avanzamos designation application.

Are Juntos Avanzamos-designated credit unions required to share data through FIDAP?

Yes. As part of the Juntos Avanzamos designation, participating in credit unions are expected to share data through the Financial Inclusion Data Analytics Platform (FIDAP). This data helps Inclusiv and Juntos Avanzamos evaluate impact, track trends, and strengthen advocacy efforts that support Hispanic and immigrant communities nationwide. Data shared through FIDAP is used in aggregate form only and is designed to protect member privacy while demonstrating the collective impact of the Juntos Avanzamos network.

What happens after we submit our application in Submittable?

Once submitted, your application will enter a formal review process that includes:

- Initial staff review for completeness
- Evaluation by the Selection Committee
- Requests for clarification or additional documentation (if needed)
- A final committee determination
- You will be notified of your status once the review is complete.

How long does it take to complete the full application?

Completion time varies by institution.

What if our application is incomplete?

Inclusiv may request additional documents or clarification. Your application will not advance to committee review until all required materials are provided.

What happens if our credit union receives the designation?

- Receive a formal acceptance notification
- Sign the Juntos Avanzamos Designation Agreement
- Begin planning the Proclamation Ceremony (90-day notice required)
- Join the national JA network and gain access to resources, partnerships, and support

What happens if our credit union is not approved?

If not approved, Inclusiv will provide:

- A formal notice of the decision
- A summary of areas needing improvement
- An invitation to reapply once the recommended enhancements are completed

APPLICATION WINDOW (2026)

When can credit unions apply for the Juntos Avanzamos designation?

There will be two application windows each year:

- Spring
- Fall

DESIGNATION AND COMPLIANCE

What is required to maintain the Juntos Avanzamos designation?

Designated credit unions must:

- Maintain all minimum designation requirements
- Participate in Juntos Avanzamos network activities, webinars, and initiatives.
- Submit updates, data, or reports when requested to confirm ongoing compliance.

Please reach out us at juntosavanzamos@inclusiv.org for support at any stage of the process. Contact details are available on the Inclusiv website and within Submittable.