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**Filene uncovers strong financial impact for CDFI credit** **unions**

*CU Strategic Planning contributes to Filene research*

TACOMA, Wash. (September 11, 2025) New research from Filene, *“*[*Amplifying Your Credit Union’s Mission: Financial and Community Impacts of Being a CDFI*](https://www.filene.org/reports/amplifying-your-credit-unions-mission-financial-and-community-impacts-of-being-a-cdfi)*,”* illustrates how Community Development Financial Institution-certified (CDFI) credit unions thrive. [CU Strategic Planning](https://www.custrategicplanning.com/cu-cdfi), the leader in CDFI certification, grant application, and strategy for credit unions, contributed research support to the project.

The research covers both quantitative and qualitative analysis. Filene finds that CDFI credit unions experience higher:

* Asset growth
* Member growth
* Loan growth
* Loans outstanding
* Loan-to-asset ratio
* Interest income on loans
* Net worth
* ROA
* ROE

The analysis also emphasizes that there was no correlating increase in delinquencies nor net charge-offs among [CDFI credit unions](https://www.custrategicplanning.com/cu-cdfi). Filene also shared impactful programs, best practices and strategies to help credit unions navigate the CDFI Program and create the most impact with their CDFI status.

The 2025 research is a follow-up to a 2015 study also published by Filene with CU Strategic Planning.

“This report highlights what we’ve long understood: that mission and margin can reinforce each other, especially when leaders design for both,” [CU Strategic Planning](https://www.custrategicplanning.com/contact) President Stacy Augustine says. “Filene’s work gives mission-driven credit unions confidence that serving deeper in their communities can create a virtuous cycle of safe, profitable growth.”

The report highlights the increase in credit unions’ interest in becoming CDFIs. CDFI credit unions nearly doubled, from 241 in 2015 to 491 by the end of 2024. It also notes that the past ten years has seen “more external resources for credit unions to lean on for support, with several firms providing services aimed at helping credit unions solidify their CDFI strategies and applications.”

Augustine adds, “We’re proud to have supported the research and to help credit unions put these insights to work.”

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[**About CU Strategic Planning**](https://www.custrategicplanning.com/)

*Since 2008,* [*CU Strategic Planning*](https://www.custrategicplanning.com/) *has provided business planning services for credit unions, focusing on community development. The Callahan Company is the No. 1 CDFI certification, grant-writing and compliance firm for credit unions in the country. Through grants, strategic and tactical planning, comprehensive business consulting and more, CU Strategic Planning achieves its mission to unlock opportunities for credit unions to change lives and their communities. CU Strategic Planning’s expert consulting includes securing and managing compliance for more than $1 billion in US Treasury CDFI grants and related award funding.*