



2009 FINANCIAL EDUCATION GRANT GUIDELINES

Financial Education Grant

Veridian's Financial Education Grant targets programs that improve the financial knowledge of adults and/or children. Example programs include, but are not limited to, school programs, financial planning or money management seminars, and resource materials.

Grant Review

Applications must be received by 3:00 p.m. on Friday, October 30, 2009. A total of \$30,000 is available from the Financial Education Grant. A committee reviews the grants, and funds are awarded within approximately 30 days after the application's deadline. Applicants will be notified on all decisions.

Grant Eligibility

Programs in the following list of organizations **are not eligible** for funding.

- Individuals (scholarships, student trips and pageants)
- Organizations fundraising for other organizations
- Political, partisan, or labor organizations, religious or fraternal organizations
- For-profit organizations, promotional organizations, sports or athletic groups and activities

Grant Guidelines

Each grant application should adhere to the following grant guidelines:

1. All questions must be answered on the application.
2. Do not include extra materials, such as brochures, pamphlets, etc.
3. The application must be typewritten in no smaller than 10-point type.
4. Your application must be free of staples.
5. Veridian Credit Union will not provide funding to organization's using another's tax-exempt status.
6. Funding for administrative staffing expenses will not be considered.
7. Organizations can only receive grant funding once per year.
8. If Veridian funds are used for programs other than the program applied for, we will request the funds to be returned. Future applications from your organization will not be considered.
9. Incomplete applications will not be considered.
10. Funds must be used within our 35-county field of membership which includes Allamakee, Benton, Black Hawk, Boone, Bremer, Buchanan, Butler, Cedar, Cerro Gordo, Chickasaw, Clayton, Dallas, Delaware, Fayette, Floyd, Franklin, Grundy, Hardin, Iowa, Jasper, Johnson, Jones, Linn, Louisa, Madison, Marion, Marshall, Muscatine, Polk, Poweshiek, Story, Tama, Warren, Washington, and Winneshiek Counties. Applicants should not request funds if a portion would be sent out of the 35 counties including administrative or other fees of a parent organization. Also eligible for membership at Veridian Credit Union are individuals with disabilities, as defined by the Americans with Disabilities Act of 1990, who are living in the State of Iowa.
11. A final report must be received within 30 days of the project's completion.

Funds need to be used within the 2010 calendar year. Multiple-year commitments will not be considered.

If your organization is eligible to receive Veridian funding, complete the application on the following pages, and use the checklist at the end of the application to ensure your have included all required items.

Send Grant Requests To:

Veridian Credit Union
Katie Bjerke, Communications Specialist
P.O. Box 6000
1827 Ansborough Avenue
Waterloo, IA 50701-6000
(319) 833-1158 phone
(319) 833-1185 fax
KatieHB@veridiancu.org



2009 FINANCIAL EDUCATION GRANT APPLICATION

Section 1: Organization Information

Name of Organization/Agency		\$	Amount Requested	
Name of Program		Program Contact Person		
Address	City	State	Zip Code	
Telephone		Email Address		

1. Has your organization received funding from the credit union in the past? _____

If yes, please list the year and the program funded.

A final report must be on file before funding will be considered for this program.

2. Briefly describe the mission of your organization.

E. What are your goals, intended results, or outcomes? How will your program improve the financial education of your target group?

F. Describe in detail the measurements used to determine whether you have reached your stated goals?

Section 3: Communication

Please include all information on this form.

A. How will you raise awareness of your program in order to recruit participants?

Section 4: Program Budget

A. Is there a fee to participate in this program? If yes, is financial assistance available to those in need?

B. If amount granted is less than amount requested, how will this program be completed?

C. Attach program budget and ensure the following items are included. Funding for organization administrative staffing expenses will not be considered for grant funding.

- Indicate sources of income, potential income, and in-kind contributions. Indicate the value of all contributions.
- Indicate which expenses will be funded by Veridian's grant.
- Indicate what percentage of your program's budget will be funded by United Way?

Section 5: Grant Application Checklist

Please verify the following items are complete.

- All questions are answered on the application.
- Do not include extra materials, such as brochures, pamphlets, etc.
- The application in no smaller than 10-point type.
- Your application is free of staples.
- Funds must be used within our 35-county field of membership which includes Allamakee, Benton, Black Hawk, Boone, Bremer, Buchanan, Butler, Cedar, Cerro Gordo, Chickasaw, Clayton, Dallas, Delaware, Fayette, Floyd, Franklin, Grundy, Hardin, Iowa, Jasper, Johnson, Jones, Linn, Louisa, Madison, Marion, Marshall, Muscatine, Polk, Poweshiek, Story, Tama, Warren, Washington, and Winneshiek Counties. Applicants should not request funds if a portion would be sent out of the 35 counties including administrative or other fees of a parent organization. Also eligible for membership at Veridian Credit Union are individuals with disabilities, as defined by the Americans with Disabilities Act of 1990, who are living in the State of Iowa.
- Funds will to be used within the 2010 calendar year.

Please include the following items in this order when submitting your grant application.

- Completed grant application
- Program budget
- Organization's major funding sources and level of support
- Organization's most recent Balance Sheet and Statement of Revenue and Expenses (excluding public schools and universities)
- Organization's Board of Directors (excluding public schools and universities)
- Organization's 501(c)(3), 501(c)(4), 501(c)(6) or 509(a)(1) letter from the IRS (excluding public schools and universities)

Section 6: Grant Application Agreement

The undersigned hereby certifies that the information included with this application is correct to the best of my knowledge. The IRS 501(c)(3), 501(c)(4), 501(c)(6) or 509(a)(1) has not been revoked, canceled or modified. Funds will be used for the projects outlined in the application as agreed to by both parties.

Signature of Applicant _____ Date _____