



**CREDIT UNION**

**GRANT APPLICATION**

**1. APPLICANT**

Organization Name \_\_\_\_\_  
 Legal Name (if different) \_\_\_\_\_  
 Mailing Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Office Phone \_\_\_\_\_ Website \_\_\_\_\_  
 Email \_\_\_\_\_  
 Contact Person \_\_\_\_\_  
 Contact Person's Mailing Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Work Phone \_\_\_\_\_ Personal Phone \_\_\_\_\_  
 Email \_\_\_\_\_

**2. STRUCTURE**

Is your organization an IRS 501(c)(3) not-for-profit?       YES    NO  
*If no*, is your organization a public agency/unit of government?       YES    NO

- A. Brief summary of organization history, including the date your organization was established.
- B. Brief summary of organization mission and goals.
- C. List of Board members and their affiliations
- D. Brief description of key staff, including qualifications relevant to the specific request. (List number of full-time paid staff, part-time paid staff and volunteers.)

**3. Finances**

- A. Most recent financial statement from most recently completed year, audited if available, showing actual expenses. This information should include a balance sheet, a statement of activities (or statement of income and expenses) and functional expenses.
- B. Organization budget for current year, including income and expenses.  
 Project budget, including income and expenses (if not a general operating proposal).
- C. List names of corporations and foundations from which you are requesting additional funds, with dollar amounts, indicating which sources are committed or pending.

A copy of your current IRS determination letter (or your fiscal agent's) indicating tax-exempt 501(c)(3) status.

If an employee, or family member of an employee of All In Credit Union is involved with your organization, list names and involvement.

#### **4. COMMUNITY IMPACT INFORMATION**

A. Population served; geographic area served; number of people served.

B. Brief description of organization's current programs or activities, including any service statistics and strengths or accomplishments. Please highlight new or different activities, if any, for your organization.

C. Your organization's relationship with other organizations working with similar missions. What is your organization's role relative to these organizations?

D. How the organization plans to complete the naming process in order to prominently display the All In Credit Union name.

#### **5. DETAILED DESCRIPTION OF USE OF FUNDS**

A. The opportunity, challenges, issues or need and the community that your proposal addresses.

B. How that focus was determined and who was involved in that decision-making process.

C. Specific activities for which you seek funding.

D. Overall goal(s) regarding the situation described above.

E. Objectives or ways in which you will meet the goal(s).

F. Who will carry out those activities.

G. Time frame in which this will take place.

H. How the proposed activities will benefit the community in which they will occur, being as clear as you can about the impact you expect to have.

I. Long-term funding strategies (if applicable) for sustaining this effort.

## 6. MEASUREMENTS OF SUCCESS

A. Please describe your criteria for success. What do you want to happen as a result of your activities? You may find it helpful to describe both immediate and long-term effects.

B. How will you measure these changes?

C. Who will be involved in evaluating this work? Staff, board, constituents, community, consultants?

D. What will you do with your evaluation results?

**7. NAME** *of the authorized official of the organization who has the authority to apply for grants and sign grant agreements for the organization.*

Name: \_\_\_\_\_

Title: \_\_\_\_\_ Phone \_\_\_\_\_

Email \_\_\_\_\_

## 8. CHECKLIST OF REQUIRED MATERIALS:

- Completed Checklist
- Proposal narrative
- Organization budget
- Project budget (if not general operating grant)
- Financial statements, preferably audited, showing actual expenses including:
  - Balance sheet.
  - Income Statement
- List of additional funding
- List of board members and their affiliations
- Brief description of key staff
- IRS Affirmation or Determination letter regarding charitable status/tax exemption