

CREDIT UNION FOUNDATION OF THE DAKOTAS

Grant Application

2019



Grant Application



Grant Application Summary for Credit Unions and Non-Credit Union Organizations in North Dakota and South Dakota

Eligibility Requirements:

1. All affiliated North and South Dakota Credit Unions are eligible to apply, as well as other community organizations. Non-Credit Union organizations may apply for grant funding, but must partner with a North or South Dakota credit union and be able to clearly demonstrate how the project will impact Credit Unions and their members.
2. Uses of funds from the Credit Union Foundation of the Dakotas are as follows:
 - Public education initiatives related to consumer finance;
 - Projects and programs that support new, small or community development credit unions;
 - Enhancement to League/Association projects funded by other sources that are consistent with the Foundation's mission and purposes;
 - Programs or projects that extend credit union services to the full range of membership, with emphasis on the unserved, underserved or "low-wealth" consumers;
 - Affordable housing projects;
 - Disaster relief;
 - Partnerships that provide services or carry out projects consistent with the Foundation's mission and purposes;
 - Other purposes consistent with the Foundation's 501(c)(3) mission and purpose; and
 - Matching fund for a project or program that meets criteria.
3. Solicit endorsement and/or additional funding from at least one local credit union or credit union related supporter.
4. Projects must be able to leverage funds from other community, philanthropic, government or other sources to maximize benefit and ensure sustainability at the conclusion of funding from this grant.
5. Obtain letters confirming in kind support or funding commitments from partners both within and outside the credit union movement.
6. Projects must have tangible, achievable goals and objectives.
7. Grants will not be awarded to political campaigns or promotion for public office candidates, programs that promote religious activities, event sponsorships, national credit union sponsored programs, or scholarships that fund individual high school or college students.

Grant Report

Successful applicants must mention the Credit Union Foundation of the Dakotas in all press releases, newsletter articles and website references related to the grant project. A suggested credit line is the following: "This project has received local recognition through a Grant from the Credit Union Foundation of the Dakotas."

At the conclusion of the project or event, all grantees are required to submit via e-mail a final report addressing the results of the project, provide copies of marketing materials, photographs, articles and other information related to promotion and execution of the project.

Filing of this grant report will be a factor to be considered for the review of future grants and grant funding.

Required Attachments:

- Completed Grant Application
- The organization's letter from the IRS (if it is not a North or South Dakota Credit Union) stating that it is tax-exempt under Section 501(c)(3) or Section 501(c)(6) and not a private foundation under Section 509(a).
- An up-to-date audited financial statement and a complete copy of a recent Form 990 federal tax return (if it is not a North or South Dakota Credit Union).
- Current organizational and project budget, and if available, budgets for the coming year.
- Leadership information about the applicant's board and staff.
- List of other funding sources for the organization, including letters of in kind support/funding commitments.

Review and Grant Making Process

Deadline

Bi-annual deadlines for the Credit Union Foundation of the Dakotas grant applications will be due **May 30th** and **November 1st**. The maximum amount of grant requests approved will be **\$1,000 per year, per organization**.

Submission

To be eligible, grant applications must be sent via e-mail to lwelder@cuad.coop. Late, incomplete, or faxed applications will not be considered.

The Credit Union Foundation of the Dakotas will meet within 20 days of the deadline to evaluate proposals and make funding decisions. Applicants will be notified about funding decisions via e-mail or by phone no later than 30 days from deadline.

If you have any questions, please call **Lori Welder**, Executive Director of the Credit Union Foundation of the Dakotas, at **701.250.3968**.

2019 Credit Union Foundation of the Dakotas Grant Application for Credit Unions and Non-Credit Union Organizations

Date: _____

Legal Name of Organization: _____

Address: _____

Mailing Address

City

State

Zip

Email Address: _____

Name of Executive Director and/or Chief Volunteer Officer:

Is the applicant an IRS 501(c)(3) or an IRS 501(c) non-profit, non-governmental, tax exempt, charitable organization?

Yes No

CONTACT PERSON INFORMATION

Contact Person: _____

Contact Title: _____

Phone: _____

Fax: _____

Email Address: _____

Website: _____

Amount Requested: \$ _____

Summary of Organization's Mission:

CHAPTER ONLY – Match Program

Will the Chapter be contributing funds (up to \$500) for a Foundation match in addition to the original \$500 grant to support the financial wellness initiative?

Yes – Amount \$ _____

Source: _____

No

Please note only Chapters affiliated with Credit Union Association of the Dakotas may receive a grant with a maximum of \$1,500 upon approval. Chapters that complete projects that were not pre-approved will only receive a \$500 grant, not the bonus match.

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Project Name: _____

Project Summary:

List of Project's Specific Target Population and Geographic Communities:

Project Budget in US Dollars:

\$ _____

If already prepared, please attach budget. Otherwise, please supply a detailed breakdown by categories of expenses and indicate funds committed or requested from other donors:

The Period This Grant Will Cover: _____ / _____ to _____ / _____.

Signature

Date

Email application and required attachments to Lori Welder: lwelder@cuad.coop

