



OHIO CREDIT UNION FOUNDATION

### OUTREACH GRANT APPLICATION

The Ohio Credit Union Foundation supports modest means outreach initiatives that promote financial independence through credit unions. Grant dollars enable credit unions to implement programs within their communities that fulfill their social responsibility to make financial services affordable and accessible to all members.

Please note:

- For special events, credit unions or chapters will be reimbursed after the event is successfully completed and a written follow-up is received.
- Funds may not be used as a cash donation to a third party.

#### APPLICANT INFORMATION

Credit Union: \_\_\_\_\_ Chapter: \_\_\_\_\_

Credit Union CEO/President: \_\_\_\_\_

Asset Size: \_\_\_\_\_ Number of Members: \_\_\_\_\_ Number of Employees: \_\_\_\_\_

Title of Event or Project: \_\_\_\_\_

Contact Name and Title: \_\_\_\_\_

Address: \_\_\_\_\_ City, State & Zip: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Amount Requested: \_\_\_\_\_ Total Project Budget: \_\_\_\_\_

If you receive a grant, how much (%) of the balance will be paid by the following:

Credit Union: \_\_\_\_\_ Chapter: \_\_\_\_\_ Other: \_\_\_\_\_

\_\_\_\_\_  
Signature of President/CEO or Chairman of the Board

\_\_\_\_\_  
Date

#### OCUF Funding Recognition

Successful applicants must mention the Ohio Credit Union Foundation as having provided grant funding in all press releases, news stories, articles, interviews, and web site references. A suggested credit line is the following: “[Your Credit Union Name] received funding through a grant from the Ohio Credit Union Foundation.” Copies of the above materials must be provided to the OCUF.

#### Return to:

Ohio Credit Union Foundation, Executive Director, 10 West Broad Street, Suite 1100, Columbus, OH 43215

## **OUTREACH GRANT APPLICATION**

### **I. EXECUTIVE SUMMARY**

- A. Explain why the credit union is requesting this outreach grant, what outcomes you hope to achieve, and how you will spend the funds if a grant is made.
- B. How will the grant meet the credit union or chapter's community outreach objectives?
- C. How will the grant funds be used to provide benefits that coincide with the stated mission of the Ohio Credit Union Foundation, "Promote financial independence through credit unions?"

### **II. STATEMENT OF NEED**

- A. Explain the specific need/problem being addressed through this project, the community being served, and how this population will benefit from the project.
- B. Present documentation such as newspaper articles or quotes to support the local needs.

### **III. ORGANIZATION**

- A. Briefly describe the history and membership of the credit union with an overview of current priorities and programs.
- B. Discuss your capability to administer funds and implement the project. Provide brief biographies for the individuals coordinating the project.

### **IV. OBJECTIVES**

- A. Describe the primary purpose and secondary objectives you are attempting to achieve.
- B. What is the length/timeline of the project? What strategies will be used for implementing the project?
- C. Has the project been approved by your state or federal regulator, if applicable?
- D. How will the project improve or impact the community?

### **V. CU PARTICIPATION**

- A. What financial and/or human resources is the credit union investing in this project?

### **VI. MEASURES OF SUCCESS/EVALUATION**

- A. Describe the quantifiable goals/objectives by which the project's progress and final success will be measured.
- B. What are the criteria for success?
- C. What results are expected by the end of the funding period?

### **VII. PROJECT BUDGET**

- A. Include total estimated costs, projected budget, income sources, and list of other requests for funding, including those pending and those approved. Specify what budget items the OCUF grant will cover.

### **VIII. SUSTAINABILITY**

- A. How will the project or program be maintained/supported at the conclusion of the funding cycle?

### **IX. ATTACHMENTS**

- A. Letters of support from credit unions and/or partners.