



OHIO CREDIT UNION FOUNDATION

FINANCIAL EDUCATION GRANT APPLICATION

The Ohio Credit Union Foundation supports educational and 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 or financial education 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 Name: _____ Chapter: _____

Credit Union CEO/President: _____

Asset Size: _____ Number of Members: _____ Number of Employees: _____

Title of Project/Program: _____

Is this project part of the MoneyAndStuff initiative? _____

Contact Name and Title: _____

Address: _____ City/State/Zip: _____

Daytime Phone: _____ Fax: _____

Email Address: _____

Program Date(s): _____

Anticipated Number of People to be Served: _____

Grant 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: _____

Will you be leveraging funds from other sources? _____

If so, please provide information about the source(s): _____

Attach a 2-3 page narrative to address the following:

1. How will grant funds be used to provide benefits that coincide with the mission of the Ohio Credit Union Foundation to “Promote financial independence through credit unions”?
2. Describe the history and membership of your credit union with an overview of programs, activities, and evidence of a capability to administer funds and implement project.
3. Provide a detailed description of the project/program. Is this an ongoing project/program?
4. Has the project/program been approved by your state or federal regulator, if applicable?
5. What age group(s) will you reach with your project/program? If you are working with children, please list the school district and schools you will be working with?
6. Is the project/program employee or volunteer driven?
7. What resources will you use (curriculum, books, products, special program, etc.)?
8. Describe the primary purpose and secondary objectives of the project/program.
9. Discuss the potential impact of the project on your community and/or target population.
10. Provide a project/program budget that includes financial contributions made by the credit union and community partners. Please indicate which project/program expenses are based upon estimates or actual costs. Finally, specify what budget items the OCUF grant will cover.

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: “_____ Credit Union 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, 10 West Broad Street, Suite 1100, Columbus, OH 43215