



# Grant Request Guidelines

Thank you for your interest in Y-12 FCU Gives Foundation.

Y-12 FCU Gives Foundation receives many requests for support in the form of grants and sponsorships. Unfortunately, it is not possible for us to honor all requests, even though many are submitted by worthwhile organizations and causes. Because resources are limited, our grant program primarily supports the needs of organizations that align with our core foundation values which focus on educational initiatives, health and wellness and emerging community needs. The Foundation will only approve a grant to an organization once in a calendar year.

Grant application requests will only be considered during the following times:

Date Range Available	Application Due Date	Organization Notified by	Focus Area
11/15/18 – 12/31/18	December 31, 2018	February 28, 2019	Health and Wellness
5/15/19 – 6/30/19	June 30, 2019	August 30, 2019	Education
11/15/19 – 12/31/19	December 31, 2019	February 28, 2020	Health and Wellness

Grants for **emerging community needs** will be accepted the entire year; however, they will only be reviewed quarterly in March, June, September and December.

## Grant Eligibility:

Program or project must be located within the Credit Unions primary field of membership (Anderson, Blount, Campbell, Knox, Loudon, Roane, Sevier, and Union) with money staying in those communities without being processed by a national organization. Grant must address one of the focus areas listed below:

- **Education** – Programs/Projects that assist in improving the lives of children in the community or that foster education, learning and leadership. Priority will be given to programs that focus on reading and financial literacy for children and adults.  
Examples include:
  - Early Childhood education
  - After school tutoring and mentoring programs
  - College/career exploration and preparation programs
  - Parent Leadership Training
  - Job Prep and Training
  - Financial/Reading Literacy Education – Children and Adults
- **Health and Wellness** – Medical care for the uninsured and underinsured, child care and family supportive services, transportation related to medical care and critical needs such as hunger relief.
- **Emerging Community Needs** – New programs or projects that address a specific need within the community.

## Exclusions:

As a general policy, we do not approve grants to individuals, organizations that are not tax exempt, political campaigns or endorsements, or projects that have explicit religious content, express a particular religious view or advance a religious purpose. Some secular community service programs such as soup kitchens, shelters for the homeless, and job banks may be eligible, even when sponsored by religious groups. While our focus is on supporting education, we do not

approve grants to individual schools. Capital projects and equipment are also excluded from grants. The foundation will not commit to multi-year funding.

To assist the Grant Committee in evaluating your need(s), please submit a completed Grant Request Application to [GIVESgrantrequest@y12fcu.org](mailto:GIVESgrantrequest@y12fcu.org).

For grant request of \$5,000 or greater you will need to submit the following documents with your application:

- Most recent annual report for the organization
- Total board approved annual operating budget for the current fiscal year and a complete project budget, if applicable
- Current Board of Directors list with background and affiliation of each member;
- Most recent, current independent financial audit. (Copy of 990)
- YTD financial statement (income and expense) for your current fiscal year
- List top three measurable results you expect to accomplish if the grant is awarded.

***If you are unable to provide any of the supporting documentation please add a note to your request stating the reason.*** Applications that are incomplete or not submitted during the applicable grant opening window will not be reviewed for funding.

No mailed, faxed, or phone-call requests will be accepted. Receipt of this request does not guarantee support.

The Y-12 FCU Gives Foundation asks organizations receiving grants of \$5,000 or greater to submit a follow-up report to the Foundation no later than six months after receipt of funding. Reports should include general project outcomes and results as well as any supplemental materials, e.g., event photographs, printed materials, newsletters, etc. Follow-up reports should be submitted to: Y-12 FCU Gives Foundation, 501 Lafayette Drive, P.O. Box 2512, Oak Ridge, TN 37831-2512.

Please review the guidelines carefully and submit your request as directed. At Y-12 FCU Gives Foundation, we will continue to provide employees of Y-12 FCU with opportunities to serve the communities in which they live and to partner with organizations and causes in which they believe. Thank you for your interest.