

Community Giving Grant Application



The purpose of this form is to gather information, specific to your funding request that will aid Charter Oak in deciding whether your application will be considered. There are several criteria we look for when considering an organization for funding. Once a request is reviewed, applicants will be notified in writing of the Community Giving Committee's decision.

Please provide complete answers to the following and attach additional pages if necessary. Should brochures regarding your program be relevant, please include them with the completed application.

SECTION ONE: GENERAL ORGANIZATION INFORMATION

Date Submitting Application:

Name of Organization:

Address:

City:

State:

Zip:

Email Address:

Website Address:

Chief Executive Officer (CEO)/Executive Director:

Contact Person for the Application (if different from the CEO/Executive Director):

Title:

Phone:

Fax:

Email:

What year was your organization started?

Geographic area served:

Who does your organization serve and how many individuals benefit from your efforts?

Has your organization received funding from Charter Oak's Community Giving Program in the past?

Community Giving Grant Application



Does an employee of Charter Oak Federal Credit Union serve on your Board of Directors or volunteer with your organization? If yes, please name the individual(s).

Does your organization do any banking with Charter Oak? If not, who do you currently bank with?

Does your organization receive support from the United Way of SECT?

If yes, please list the most recent amount received:

Were all of these funds given for the same program for which you are applying to the Community Giving Program?

If yes, how much was used for this program?

Please provide a brief description of the history, size and mission of your organization.

SECTION TWO: GRANT REQUEST

Amount Requested:

Total project budget (Please attach a detailed budget, including both income and expenses, and showing how the amount requested would be spent, if awarded):

Proposed starting date of project:

Proposed completion date:

- Please provide a one-paragraph executive summary of the Grant request.
- Please attach a narrative of no more than 5 pages that provides the following information about your project.

Community Giving Grant Application



1. Number of people/targeted population to be served by the program.
2. Please describe the issues or concerns that this program is designed to address.
3. Is this a new or ongoing program/project? If ongoing, for how long? Please provide copies of past promotional materials and media coverage.
4. Please describe the program activities: what will you do, who will participate, where will it take place, and what is your timetable?
5. How will this project support or differ from other similar projects in the community?
6. What kinds of plans do you have in place to promote your organization within the local community to raise awareness of your project?
7. What qualifications do your organization and its staff possess that will enable you to operate this program successfully? (Please do not attach staff resumes)
8. What are the goals of the program? In other words, what specific outcomes will you need to achieve in order to consider the program a success? How will you measure this?
9. Describe how the Charter Oak Federal Credit Union's Community Giving Program will be recognized for supporting this project.
10. When are the funds needed?

SECTION THREE: OTHER SOURCES OF FUNDING

Please list any other public or private organizations that have provided significant charitable contributions to your organization during the past year:

Name of Contributing Organization:

Amount of Contribution:

Please list any other organizations that have been approached for funding for this project, and include the amount requested and the status of the request.

Name of Organization:

Amount Requested Status:

Community Giving Grant Application



SECTION FOUR: APPROVAL OF CHIEF EXECUTIVE OFFICER

Approval of Chief Executive Officer or Organization Representative: The organization named above will act as the responsible fiscal agent for any funds which might be received and will comply with applicable tax laws, regulations, and guidelines.

Signature of CEO:

Date:

Attach the Following Supporting Documents:

- A copy of the IRS letter documenting the 501 (c) (3) status of your organization
- The mission statement of your organization
- A list of your board of directors or trustees, with their affiliations
- A complete budget for the project for which you are requesting funding (including both income and expenses)
- The current annual operating budget for your organization
- Your most recent annual report

Sorry-we cannot accept applications via fax or email. All applicants will be notified in writing of the Community Giving Committee's decision. Applicants may request information about the program or how to apply for funding by calling the

Community Giving Coordinator at 860.446.3425 to discuss their project prior to submitting an application. All Grant applications must be complete in order to be reviewed.

**Forward completed application to:
Charter Oak Federal Credit Union Community Giving Program
Attn: Community Giving Coordinator
1055 Hartford Turnpike
Waterford, CT 06385**