



OVERVIEW

SAFE Credit Union is pleased to announce our 2021 application process for our Community Sustainability Grant. As a not-for-profit, member-owned financial services provider, our mission is to serve our members and communities. Through the SAFE Community Sustainability Grant, we support community initiatives that have significant impact on the Sacramento area and align with our three areas of philanthropic engagement.

1. Programs supporting healthy community initiatives.
2. Education programs specific to financial education and financial capability.
3. Initiatives supporting work-force development for military personnel transitioning to civilian careers.

For 2021, SAFE will award up to \$120,000 in a three-phase funding cycle. Each grant will not exceed \$20,000.

Q1 deadline for nonprofits focused on veterans transitioning to civilian careers is March 5, 2021.

Q2 deadline for nonprofits focused on healthy community initiatives is April 30, 2021.

Q3 deadline for nonprofits focused on financial education and/or financial capabilities is July 30, 2021.

Grant Qualifications

1. Applicants must have tax-exempt status under Section 501(c)(3) of the Internal Revenue Code and demonstrate financial stability.
2. A local board of directors must govern applicants.
3. Applicants must be in and affect individuals or groups within SAFE's area of membership.
4. Applications must be compatible with one of our areas of focus. Please check one area:
 - Health
 - Education
 - Veterans

Important Dates

Applications and all supporting documents are due to SAFE via email at grants@safecu.org by 5 p.m. by the deadlines listed above.

SAFE Credit Union will notify grant recipients within 60 days of the application deadline.

INSTRUCTIONS

Download and fill out the attached application in its entirety by **the applicable deadline**.

Please submit the application electronically to grants@safecu.org and all of the required documents for your organization listed below.

- 501(c) (3) status letter from the IRS
- Current annual operating budget
- Audited financial statement (or copy of Form 990)
- Request for Taxpayer Identification Number and Certification (Form W-9)
- Most recent annual report
- Proof of general liability insurance
- List of board of directors
- List of leadership staff



- One to three letters of support

You will receive confirmation of the receipt of your proposal within 48 hours. Late and/or incomplete applications will not be considered.

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Date of application		
Legal name of organization applying (Should be the same as on IRS determination letter and as supplied on IRS Form 990)		
Year founded		
Current annual operating budget		
Are you currently receiving funding from SAFE CU? Identify reason and amount.		
Executive director		
Contact person and title (If different from executive director)		
Address (principal/administrative office)		
Mailing address, if different from above		
Project name		
Purpose of grant (one sentence)		
Amount requested and total project cost		
Geographic area served		
Signature: Board of directors chairperson		Date:
Typed name and title		
Signature Executive director		Date
Typed name and title		



YOUR PROGRAM/PROJECT DESCRIPTION Briefly describe your agency and its mission.

Describe the program/project in detail to include population served; the planned or proposed activities or curriculum; and an implementation timeline with specific date, if possible. How is your grant request connected to SAFE's three philanthropic engagement areas of veterans, health, and education?

Indicate the number of people you anticipate the program will serve annually.

Describe how the impact of funding can/will be measured. Be as specific as possible.

Are you aware of other community agencies or organizations providing a similar service, or targeting the group this program/project will serve? Please explain.

Would your organization be willing to:

- Provide a link to SAFE's website on your organization's website?
- Allow for SAFE's logo to be included in print and digital material relating to the project?
- Allow SAFE to be recognized in publicity related to the project?
- Provide volunteer opportunities for SAFE volunteers?

Has your agency attended the Impact Foundry Certified Sustainable course?

YES

NO



FINANCIALS

Please detail the total funds requested from SAFE (\$20,000 maximum). In your attached program/project budget, please specify exactly how the funds would be spent and at what point in the program/project timeline.

Are you currently requesting or receiving additional funding from other organizations for this program/project? If yes, please list the names of all other organizations from which you are requesting or receiving funding.

If the program/project is ongoing, identify possible sources of future funding or community support. If this program/project is not able to be supported by SAFE funding and volunteers for more than one year, how will this program/project be continued or re-organized to continue addressing the community?

EVALUATION

Evaluation of your program will be requested one year from the date the grant was awarded. The program/project should contain criteria to determine whether it has been a success, even if objectives were not met.

How do you plan to monitor and measure program/project outcomes and impact, and program/project success (what is your evaluation plan)?

Please provide the name, title, email address, and phone number of the person who will be responsible for monitoring and measuring program/project outcomes, impact, and evaluation.

Thank you for requesting support from SAFE Credit Union. Completion of this application does not guarantee you will be awarded a grant. SAFE will contact you once our committee has reviewed your application and made a decision on the recipient(s) of the grant.

Please note that this application may be used by SAFE to pursue other opportunities within our company, including volunteer support and collection drives.