



GRANT APPLICATION GUIDELINES

Please send your completed application to:

**Financial Investments, Inc. Philanthropic Fund
462 Herndon Parkway, Suite 205
Herndon, VA 20170**

PLEASE SEND ONE (1) COPY OF YOUR COMPLETED PROPOSAL



Mission Statement

Our mission is to have a positive social impact on those in need in the Washington, DC area. Investments we will consider shall include social economically disadvantaged youth and young families striving to adapt, improve, and eventually have these individuals become contributing individuals back to society.

Financial Investments Inc.'s criteria for submitting grant proposals:

- Beneficiaries must be valid U.S. Citizens and/or immigrants with legal U.S. visting documents.
- Non-profits must be fiscally responsible and have a verifiable social impact within their community.
- We look positively on organizations that have additional matching contributions (with those contributions having been received.)
- Grant proposals are accepted by the end of each quarter, March 31st, June 30th, September 30th and December 31st. Grants are issued during the subsequent quarter.
- Grants are initally issued for \$2,000 to \$10,000 per year. Subsequent grants may be issued upon submission and presentation of a viable business plan and achievement of current philanthropic objectives.
- There is no need to submit annual comprehensive financial statements and annual reports.

Financial Investments Inc. (FII)
2010 Community Investment Grant Cycle
Guidelines and Criteria

General Information: Financial Investments Inc. (FII) is pleased to announce its 2010 Community Investment Grant Cycle providing capacity building, program, and general support grants to local nonprofits. Grants will be offered through FII's Philanthropic Grant Program in the following fields of interest:

- **Poverty Relief:** food, housing and emergency assistance to those in need and programs that help people become and remain self-sufficient.
- **Child and Youth Development:** to help at risk children and youth obtain the support, services and opportunities they need to thrive. Priority will be given to programs in high need areas.

Highest priority will be given to programs in the area of poverty relief; the second priority will be given to program for children and youth.

Grant Application Deadline: All applications (one copy) and supporting documents (one copy of each) must be **postmarked by the end of each quarter, and mailed to:**

Melanie Martin or Craig Kendall
Financial Investments Inc. Philanthropic Fund
462 Herndon Parkway
Suite 205
Herndon, VA 20170

Grant Criteria: FII will consider requests for grants that meet the following criteria:

- Applicants must be 501(c)(3) organizations or organizations providing charitable or educational services
- Grant requests should initially be for \$2,000 to \$5,000 with subsequent years potential grant allocations to \$7,500.
- Applicants must complete the FII Grant Application (attached).
- Grant requests are made for program or general support purposes, not capital improvements, endowments, or scholarship awards. Funding may be used to support, expand or enhance existing programs or to start new programs.
- Grants will be made to organizations providing services in Northern Virginia (defined as the areas within Fairfax and Loudoun Counties.)
- Applications must be fully completed and contain all of the requested information and attachments (see below). Applications that are late, incomplete, or do not follow the grant format (including page limits) will not be considered.

Required Grant Application Format:

1. Applications should be printed on white paper, using a 12-point font (Times New Roman or similar font) and one-inch margins on all sides.
2. Pages should be numbered and should include the name of the organization applying at the top of each page.
3. The completed application should include the full text of each question, numbered as in the original, followed by your answer.
4. Answer all questions **clearly** and **concisely**, within the page limits noted in the application.
5. Applications should not be placed in binders or folders. **Staple** the application in the upper-left hand corner securing Sections I, II and III and letters from collaborating agencies.
6. Submit **one (1) copy** of the completed Grant Application (Sections I, II and III and letters from collaborating agencies).
7. Submit **one copy** of the supporting documents (Section IV) – 501 C3 letter, most recent audited financial statements, IRS Form 990, Board of Directors list and annual report (if available). **DO NOT ATTACH OR INCLUDE ANY ADDITIONAL INFORMATION.**
8. Applications must be postmarked by **March 31st, June 30th, September 30th or December 31st**. Or applications can be emailed to mmartin@financialii.com.

Grant Award: Grants will be announced 30 days after calendar quarter end.

Questions: contact Melanie Martin or Craig Kendall at (703) 435-2777 or email us at:
mmartin@financialii.com or ckendall@financialii.com

Financial Investments Inc. (FII)
2010 Community Investment Grant Application

I. Executive Summary - No more than two (2) pages single spaced

1. Organization's name, address, and Web site URL
2. Contact person's information (full name, title, email, and telephone)
3. Organization's federal tax-exempt number
4. Amount of this funding request (\$2,000 to \$5,000 - first year, up to \$7,500 in subsequent years)
5. Purpose of this funding request – **one paragraph - no more 50 words.**
6. The field of interest which best describes your funding request (choose **one**)
 - Poverty Relief
 - Child and Youth Development
 - Health, Mental Health, Aging
7. Total program budget (if program funding is sought)
8. Total current organizational budget and fiscal year
9. Period of time this funding request will cover
10. Geographic area to be covered by this request – **of the population to be served by the grant**, indicate the approximate percent from each of the following areas:

Fairfax County	_____%
Loudoun County	_____%
Other (list) _____	_____%
_____	_____%
11. Signature of Executive Director or President
I authorize this application and certify that the information contained in the application is true and accurate.

Signature _____ Title

II. Narrative - No more than five (5) pages double-spaced (not including letters from collaborating organizations.)

II A. Information about the organization:

1. Briefly describe the organization's history, mission, goals, and recent organizational accomplishments.
2. How does the program requesting funding fit into the work of this organization?

II B. Information about the program requesting funding (note: if requesting general support, answer the following for the whole organization):

1. Briefly describe the program for which you are requesting funding.
2. What issue/need is addressed by the program? Cite evidence of this need (how do you know the need exists?).
3. Describe, as specifically as possible the population the program is intended to benefit, including the number of individuals to be served, age and other demographic characteristics of the population, geographic location, etc.
4. Where is the program located? What hours/days/months is the program provided?
5. For a **new** program: how was the program approach developed?
6. What measurable outcomes (defined specific benefits or changes to individuals) does the program seek to achieve? For an **ongoing** program: how successful has the program been in achieving these outcomes in the last year?
7. How does this program collaborate with other organizations in the same field and/or geographic area?
8. How will the FII grant be used to support, expand, or enhance the program?
9. What resources (financial, personnel, partnerships, etc.) will be needed to sustain this effort over time? How will those resources be secured?
10. Letters from collaborating organizations: If the program applying for funding requires the cooperation of another entity (for example, if it uses space at another organization, shares transportation, is a collaboration with another program or agency) attach a short letter from the collaborating organization that describes their participation.

III. Budget Information (provide one copy, stapled to narrative Parts I and II)

1. Current FY Organizational Budget
2. Program Budget and Justification: prepare a budget showing all income and expenses for the proposed program, and an explanation of line items – including whether or not other funding sources are secured.

IV. Supporting Documents (submit ONE COPY of each)

1. A copy of your current IRS tax-exempt determination letter.
2. Most recent financial statements (audited if available).
3. IRS Form 990.
4. Current list of board members with terms, occupations, and places of employment.
5. Annual report, if available.