



## **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 Northern Virginia area. Investments we will consider shall include those which support socially and economically disadvantaged youth and young families striving to adapt and improve, so that they become contributing members of society.

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

- Beneficiaries must be valid U.S. Citizens and/or immigrants with legal U.S. visiting 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 31<sup>st</sup>, June 30<sup>th</sup>, September 30<sup>th</sup> and December 31<sup>st</sup>.
- Grants are initially issued for \$2,500 to \$7,500 per year. Subsequent grants may be issued upon submission and presentation of a viable business plan and achievement of current philanthropic objectives.
- **We would like to be kept informed on at least a quarterly basis**, of the success and difficulties that you are having in carrying out your mission as a community service organization.
- **We would like to know specifically how our employees**, and even adults and children of our employees can participate in helping with your organization, and how specifically we can engage individuals to become more active in giving back to the community. We look at this as a first step in engaging everyone that we touch to **"Give to the Community, and in Giving Beyond the Dollar."**

**Financial Investments Inc. (FII)**  
**2012 Community Investment Grant Cycle**  
**Guidelines and Criteria**

**General Information:** Financial Investments Inc. (FII) is pleased to announce its 2012 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  
or via email to [mmartin@financialii.com](mailto:mmartin@financialii.com)

**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 \$2,500 to \$5,000 with subsequent year's 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.
- **We would like to know specifically how our employees**, and their families can participate in helping with your organization, and how specifically we can engage individuals to become more active in giving back to the community. We look at this as a first step in engaging everyone that we touch to **"Give to the Community, and in Giving Beyond the Dollar."**

**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 31<sup>st</sup>, June 30<sup>th</sup>, September 30<sup>th</sup> or December 31<sup>st</sup>**. Or applications can be emailed to [mmartin@financialii.com](mailto:mmartin@financialii.com).

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

**Financial Investments Inc. (FII)**  
**2012 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 (\$2,500 to \$5,000 - first year, up to \$7,500 in subsequent years)
5. Purpose of this funding request – **one paragraph - no more than 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-end
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.

\_\_\_\_\_

SignatureTitle

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

**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?

**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. **We would like to be kept informed on at least a quarterly basis**, of the success and difficulties that you are having in carrying out your mission as a community service organization.
11. **We would like to know specifically how our employees**, and even adults and children of our employees can participate in helping with your organization, and how specifically we can engage individuals to become more active in giving back to the community. We look at this as a first step in engaging everyone that we touch to **“Give to the Community, and in Giving Beyond the Dollar.”**
12. 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.