



2011 Grant Application

Waves of Change





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In a time when competition for grant money is fierce, the NAILBA Charitable Foundation is dedicated to providing funds to small, well-run charities that may not otherwise have access to additional funding.

Since 2002, NAILBA Charitable Foundation grants have helped to advance worthwhile philanthropic projects. We welcome your grant application and appreciate the contribution you are making to your community. If you have any questions as you complete this application, please contact NAILBA's Director of Membership and the Foundation, Kathy Allison at (703) 383-3072.

About the NAILBA Charitable Foundation

The NAILBA Charitable Foundation is the philanthropic arm of the National Association of Independent Life Brokerage Agencies, the premiere insurance industry organization promoting financial security and consumer choice through the use of independent brokerage distribution.

The Foundation provides grant funds to organizations in the United States with great purpose and little economic resources that serve to enhance the quality of life for those less fortunate, with a special emphasis on children in the U.S.

Foundation grants are designed to recognize programs or projects in the communities of NAILBA's member agencies and corporate supporters.



Participants in the Center for Independence program gather for a group photo at the end of a day of crafts and therapy. This 2010 grant application was endorsed by NAILBA member agency Euclid Managers.



How Are Grants Awarded?

Grant award amounts are based on the size and scope of the organization and/or the program for which the applicant requests funding. The scope of the program will be determined by the Grants Committee of the Charitable Foundation, based on information provided by the applicant.

There is no stated limit to the amount that can be requested or granted.



Legal & General America's president Jimmy Atkins (left) presents a check to 2010 grantee A Wider Circle's founder and Executive Director Mark Bergel, Ph.D.



Youth and Family Services received a grant in 2010 thanks to the endorsement of NAILBA member agency Financial Markets, Inc.

Application Review Process

- All applications for grants to be awarded during the current calendar year (2011) must be received on or before Friday, July 15, 2011.
- Incomplete applications received after the stated deadline are returned to the applicant.
- If the grant request meets the stated criteria, the application is submitted to the Charitable Foundation Grants Committee for review, classification, and deliberation.
- The Committee forwards its recommendation to the NAILBA Charitable Foundation Board of Directors, which makes final award decisions.

Eligibility Criteria

Grants are awarded for a wide range of programs and causes, however, grants are only awarded to organizations or programs meeting the following criteria:

The organization:

- Is non-sectarian
- Is managed responsibly
- Employs appropriate fiscal accounting procedures
- Is classified as charitable by the appropriate governmental agency
- Has not received a NAILBA Charitable Foundation grant in the previous grant cycle

Grants are awarded to organizations that provide services designed to help people in need with a special emphasis on children, such as, but not limited to:

- Underprivileged children with special needs
- Programs that support at-risk youth
- Volunteer emergency services, emergency food, or shelter groups
- Programs that provide service to persons or children with physical or mental disabilities
- Organizations providing mental health services (including substance abuse programs)
- Social service organizations, programs for youth or at-risk groups.
- Programs that support business and economic research, encourage major initiatives in the field of health promotion, or increase the knowledge base or principles upon which the financial services industry depends
- Other unique and unusual opportunities for uplifting programs

Note:

Grant requests targeted to meet the needs of children will receive special consideration.



Jonathan A. Shaw, CLU, ChFC, President and CEO of Shaw Financial American (*left*), presents the 2010 grant to Dare to Care Executive Director Brian Riendeau (*right*), and Jackie R. Keating, Dare to Care Chief Development Officer (*center*).

Required Attachments

Please submit the following with your completed application:

1. Documentation from the appropriate governmental agency that recognizes the organization as a registered charity.
2. A copy of your organization's letter from the Internal Revenue Service granting it tax-exempt status.
3. A letter of endorsement from a NAILBA member agency or corporate partner.
4. A copy of your organizational documents (Articles of Incorporation and Bylaws).
5. A list of the names of your organization's governing body (Officers and Board of Directors).
6. A set of audited financial statements and operating budgets for the organization for the most current fiscal year.
7. A copy of the proposed budget for the program or project for which funds are requested.
8. A list of the major funding sources for your organization.



NAILBA member agency The Brokerage, Inc. endorsed the grant application for The Ark House in Richardson, Texas.

Tips for a Successful Application Submission

1. **DO** always type your grant proposal.
2. **DO** keep the written proposal to the point and demonstrate the intended tangible results when possible.
3. **DO** state what is to be accomplished and how it will be accomplished.
4. **DO** request funding for a specific program or project.
5. **DO** reread your proposal and check for any errors or omissions.
6. **DO** include a letter from the NAILBA member agency or corporate partner that is endorsing your application.
7. **DO** consider submitting photographs or video with your grant application.
8. **DON'T** request funds for your general operating budget, capital campaigns, multi-year grants, fundraising events, other re-granting organizations, or existing deficits.
9. **DON'T** submit an application if you've received a grant from the NAILBA Charitable Foundation in the previous grant cycle (2010).



Participants at Camp Angel, a program of 2010 grantee Angel on My Shoulder, which provides weekend retreats for young people affected by cancer. NAILBA member agency CPS Horizon endorsed their grant application.

Written Attachments

Please include a written attachment for the areas listed below along with your completed Grant Application form.

1. Brief history of organization
2. Primary nature of organization programs
(youth programs, human services, health, education, research)
3. Project title and brief description
4. Geographic area to be served by this program
 - a. Regional or Local (explain)
 - b. National or International (explain)
5. Client Group to be served
6. Approximate number of individuals served by the program annually
7. Anticipated project period
8. Total project cost
9. Amount and source of matching funds, if any
10. Amount requested from the Charitable Foundation
11. Other funding sources (and amounts) for this project
12. Objective/Purpose: What specific problem is to be solved?
How will the objective be accomplished?
13. Approach: How and where will the program be implemented?
14. Competence: What evidence can you give of the ability of your organization and personnel to implement this program successfully?
15. Evaluation: How does the organization plan to evaluate the success of the program?
16. Uniqueness/Reasoning: Why should the Charitable Foundation support this program over other applicant requests?
17. How will Charitable Foundation funds be used?
18. Future Funds: How will the project be financed in the future?
19. Additional comments

GRANT APPLICATION

Please answer each question in the order presented and follow the formatting of the application as closely as possible.

Additional attachments, other than the ones requested in the guidelines, are not necessary unless they are essential to the understanding of your program. You are encouraged to submit photographs and/or video of your organization with your application. **You must include the written attachments listed on the previous page with your application form.**

Note: By submitting photographs and/or videos, you are giving the Charitable Foundation consent to reproduce or reuse the materials for promotional or publicity purposes.

Organization _____

Address _____

City _____

State _____ Zip _____

Contact Person _____

Title _____

Phone _____ Fax _____

E-mail _____

Web address _____

Endorsing NAILBA Member Agency or Corporate Partner

Letter attached? Yes No

Is the person completing the application a paid or volunteer staff member of the applicant organization? Yes No

Is the person completing the application a paid outside consultant/fundraiser? Yes No

APPLICATION SUBMISSION

**Applications due by
Friday, July 15, 2011**

All applications for grants to be awarded during the current calendar year must be received on or before July 15, 2011.

Please direct all questions and/or completed applications to:

Kathy Allison

Director,
Membership and the Foundation

NAILBA Charitable Foundation
11325 Random Hills Road
Suite 110
Fairfax, VA 22030

Phone: (703) 383-3072

Fax: (703) 383-6942

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