



2018 Grant Application

*Building Better Communities
Through Giving*





2017 Grantees

Photos from top clockwise:

Free Arts for Abused Children • Our Mother's Home
Down Syndrome Connection • Mama's Kitchen



The NAILBA Charitable Foundation is more dedicated than ever 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 close to 200 worthwhile philanthropic organizations make positive changes in their communities. We welcome your grant application and appreciate your efforts to improve conditions for those less fortunate.

If you have any questions as you complete this application, please contact the Foundation at (703) 383-3081.

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. Foundation grants are designed to recognize programs or projects in the communities of NAILBA's member agencies and corporate partners, which is the basis for the required endorsement. 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.



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 Review Committee of the NAILBA Charitable Foundation, based on information provided by the applicant.

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

Application Review Process

- **All applications for grants to be awarded during the current calendar year (2018) must be received on or before Friday, July 13, 2018.**
- Incomplete applications or those received after the stated deadline will not be considered.
- If the grant request meets the stated criteria, the application is submitted to the NAILBA Charitable Foundation Grants Review Committee for review, classification, and deliberation.
- The Committee forwards its recommendations to the NAILBA Charitable Foundation Board of Directors, which makes final award decisions.



2017 Grantees

Photos from top clockwise:

Children's Oncology Services • Glass Roots • Pediatric Brain Tumor Foundation



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:

- Has the support of a NAILBA member agency or corporate partner
- Is nonsectarian
- Is managed responsibly
- Employs appropriate fiscal accounting procedures
- Is classified as charitable by the appropriate federal and state governmental agencies.
- Has not received a NAILBA Charitable Foundation grant in the previous grant cycle

Grants are awarded to U.S. 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 services 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.

2017 Grantees

Photos top to bottom clockwise:

Cancer Kiss My Cooley • Jewish Relief Agency
Woody Foundation • Angel Flight Central

Tips for a Successful Application Submission

1. DO include a letter from the NAILBA member agency or corporate partner that is endorsing your application.
2. DO always type your grant proposal.
3. DO request funding for a specific program or project.
4. DO keep the written proposal to the point and demonstrate the intended tangible results when possible.
5. DO state what is to be accomplished and how it will be accomplished.
6. DO reread your proposal and check for any errors or omissions.
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 (2017).



2017 Grantee Ark House Foundation



2017 Grantee Seany Foundation

Required Attachments

Please submit the following with your completed application:

1. A letter of support from a NAILBA member agency or corporate partner.
2. Documentation from the appropriate state or local governmental agency that recognizes the organization as a registered charity.
3. A copy of your organization's letter from the Internal Revenue Service granting it tax-exempt status.
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. If an audit is not required, the organization's most recent IRS Form 990 submission is acceptable.
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.



2017 Grantees

Photos from top clockwise:

Quest for Grace • Urban League of Greater Kansas City

Pomeroy Recreation & Rehab Center • Camp Rainbow Foundation

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: local, regional, or national (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 NAILBA 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 NAILBA Charitable Foundation support this program over other applicant requests?
17. How will Foundation funds be used?
18. Future Funds: How will the project be financed in the future?
19. Additional comments

APPLICATION SUBMISSION

Applications are due by
Friday, July 13, 2018

All applications for grants to be awarded during the current calendar year must be received on or before July 13, 2018.

Please direct all questions and/or completed applications to:

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

Phone: (703) 383-3081

Fax: (703) 383-6942

Email: membership@nailba.org

GRANT APPLICATION

Please answer each question in the order presented and follow the formatting of the application guidelines 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 NAILBA 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 _____

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

Endorsing NAILBA Member Agency or Corporate Partner

Letter attached? Yes No



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



NAILBA Charitable Foundation

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