

# JOAN WOLFE

**INDIANA**   
**Members Foundation**  
*People Helping People*

# LEGACY GRANT

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Mandy Emery,  
VP Community  
Involvement  
Indiana Members  
Credit Union  
Executive Director  
Indiana Members  
Foundation

**Mission Statement:** The Indiana Members Foundation was organized exclusively for the purpose of being a positive influence in the community served by Indiana Members Credit Union; specifically, providing school children in the Indianapolis area with the necessities essential for learning and succeeding in their education.

## **JOAN WOLFE LEGACY GRANT REQUEST PROCEDURES**

Board of Directors

Robert E Martin,  
Retired Vice  
Chancellor IUPUI

Kenneth Beckley,  
Retired Executive VP  
HH Gregg Corp

Ron Collier, CEO  
Indiana Members  
Credit Union

The intent of the Joan Wolfe Legacy Grant is to assist schools and community organizations that help children to achieve success in learning. For 2018 the maximum individual grant is \$2,500. The total for all grants is \$10,000. The application must be fully completed to be considered. Examples of the types of programs the Foundation is willing to consider include the following

- Educational Materials
- Youth Financial Education
- Operational Assistance
- Community Centers
- Early Childhood Development
- Specific Programs & Services to Youth

The funding for grants comes from the Foundations fundraising efforts. Applications are accepted and reviewed March 1- April 30. Grant recipients will be notified by phone &/or email by the 2<sup>nd</sup> Friday in May. All recipients will be invited to our annual awards banquet held the last week of June.

Applications received outside of this window will be asked to reapply the following year.

When making a request for a grant, the application should be completed and forwarded to Mandy Emery, VP Community Involvement, Indiana Members Credit Union, 5103 Madison Avenue, Indianapolis, IN 46227, along with the grant proposal write-up. Any questions regarding this can be directed to Mandy Emery at (317)554-8121. Mandy can also be reached at [aemery@imcu.com](mailto:aemery@imcu.com).

The Foundation is looking forward to being able to support educational providers and community groups in their efforts to improve the lives of youth in their communities through the grant-making process.

5103 Madison Avenue, Indianapolis, IN 46227 - (317) 554-8121 [www.imf4kids.org](http://www.imf4kids.org)



## **GRANT PROPOSAL FORMAT**

- 1) **PROPOSAL SUMMARY** –Please summarize in a short paragraph the purpose of your organization. Briefly explain why your school or organization is requesting this grant and what outcomes you hope to achieve. Be sure to include your organizations official address, point of contact and Tax ID #. Do not use more than one page.
- 2) **NARRATIVE** –
  - a) Background-Describe the work of your organization, addressing each topic:
    - i) A brief description of its history
    - ii) The need or problem that your organization works to address.
    - iii) Current programs and accomplishments. Please emphasize the achievements of the past year and those achieved so far in the current year.
    - iv) The community your organization serves, including geographic location, socio-economic status, race, ethnicity, gender, sexual orientation, age, physical ability, and language.
    - v) Number of paid full-time / part-time staff and number of volunteers.
    - vi) Your organization’s relationships – both formal and informal – with other organizations working to meet the same needs or providing similar services. Please explain how you differ from these other organizations.
  - b) Funding request- Please describe the program or purpose for which you need help.
    - i) If applying for general operating support, briefly describe how this grant would be used and amounts corresponding to areas of support, and how this will help the organization become self-sufficient.
    - ii) If your request is for a specific project, please explain the project including:
      - (a) A statement of its primary purpose and the need or problem that you are seeking to address
      - (b) The community that you plan to serve and how this population will benefit from the project
      - (c) Strategies that you will employ to implement your project
      - (d) The names and qualifications of the individuals who will direct the project
      - (e) Anticipated length of the project
      - (f) How the project contributes to your organization’s overall mission.
    - iii) Please list the foundations, corporations, and other sources that you are soliciting for funding and to the best of your knowledge, your status with each.

- c) Evaluation-Please explain how you will measure the effectiveness of your activities.
- d) Describe your criteria for a successful program and the results you expect to have achieved by the end of the funding period.

3) **ATTACHMENTS**- Please label all attachments (Schools need not supply financial data)

- a) Financial information – Please provide the dates that each document covers.
  - i) Your most recent financial statement, audited if available or applicable. This statement should reflect actual expenditures and funds received during your most recent fiscal year.
  - ii) Aligned side by side on the same page, your operating budget for the current and most recent fiscal year.
  - iii) Aligned side by side on the same page, a list of foundation and corporate supporters and other sources of income, with amounts, for you current and most recent fiscal year.
  - iv) A copy of your business plan
  - v) If project funding is requested: A current budget for the project. List each staff line separately and include % of time spent on project. Indicate the specific uses of the requested grant.
- b) Other Supporting Materials
  - i) A list of your Board of Directors, with their affiliations.
  - ii) One paragraph resumes of key staff
  - iii) Your most recent annual report, if available
  - iv) No more than three examples of recent articles about, or evaluations of , your organization, if available

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**Grant Application**

Date: \_\_\_\_\_ Organization \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

County \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_ Contact Person/Title \_\_\_\_\_

Project Title: \_\_\_\_\_

Project Description: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Total Project Cost: \$ \_\_\_\_\_ Amount Requested: \$ \_\_\_\_\_

Project Period: \_\_\_\_\_