



Florida Financial Literacy Initiative

A statewide Initiative managed by the Florida Literacy Coalition and supported by Wells Fargo

2018 APPLICATION

Please complete the following application electronically and submit it online at <https://app.formassembly.com/forms/test/4666416>. **The narrative and budget should be submitted as one PDF document.**

Part I: Narrative

The narrative **MUST** be formatted using the following sections:

1) Project Abstract/Summary

2) History and Accomplishments

Briefly describe the organization's history, mission, current programs and activities, and students served.

3) Needs Statement

Please identify the population to be served, the problem(s) it faces, and why the project is necessary.

4) Objectives

Please describe how the proposed project will address the problem(s) identified in the Needs Statement. Objectives should be stated in clear, measurable terms. Be sure to include the anticipated number of students to be served and the approximate amount of instruction that they will receive.

5) Project Description

This section offers an overview of the project. Please provide a clear description of the project's components, and the curriculum and/or materials to be used. Be sure to describe the student population and how, where, and when financial literacy instructional services will be provided. Please describe how you will work with adult learners in your program to identify and develop a suitable project-based learning activity.

* If you are a 2017 financial literacy grant recipient, please summarize your success in achieving your objectives and describe your plans for program continuation.

6) Collaboration and Partnerships

Please state how the program plans to collaborate with outside partners to recruit students, deliver instruction, and/or promote financial literacy.

7) Recognition

Please describe how Wells Fargo will be recognized for supporting and/or be involved in the proposed project. (See Guidelines)

8) Timeline

Please provide a timeline with project milestones.

9) Evaluation

Please document how the objectives and outcomes of the proposed project will be measured. (Please see required assessment tools in the Guidelines section)

Part II: Budget

Budget items should clearly support the project description and objectives. If the project has additional funding sources, please specifically note how the funds from this grant will be used. Below are instructions for each section of the budget. Feel free to format in a spreadsheet document, if preferred.

REVENUE

Specify line items. These may include the Florida Financial Literacy Initiative grant funds provided by Wells Fargo, as well as any additional cash resources (e.g. grants, donations, fees, etc.) projected to be used for the project and their sources. Matching funds are not required.

PROJECT EXPENSES

Salaries and Benefits

Please list the salaries and benefits for all paid personnel, including instructors, administrative, and program management staff. Please indicate the total number of hours each employee will contribute to the project and the rate at which they will be paid. Benefits should be listed separately and may include employer’s portion of such things as the following: FICA, employee allowances, health insurance, etc.

Example:

<i>ESOL Instructor (4 hrs per wk. @ \$18.00 hr. for 30 weeks)</i>	<i>\$2,160</i>
<i>ESOL Instructor benefits (FICA, benefits)</i>	<i>\$350</i>

Other Expenses

Specify line items. Examples: instructional materials and supplies, lease, telephone, program events and field trips, project-based learning activities, staff travel, equipment, classroom materials, printing and postage, recognition, training, etc.

Example:

<i>Supplies for student project</i>	<i>\$500</i>
<i>Classroom materials</i>	<i>\$200</i>
<i>Bus for classroom field trip</i>	<i>\$350</i>

*Equipment purchases are limited to \$400.

* Travel limited to \$400 and may include attendance at the 2018 Florida Literacy Conference.

IN-KIND RESOURCES

Description

Specify line items. These may include volunteer time, office space, supplies, and more.

List separately any in-kind resources that you anticipate will be contributed in support of this project. Volunteer time should be valued at \$24.69 per hour.

(Source: <http://www.independentsector.org>)

2018-2019 BUDGET

REVENUE	Amount
Florida Financial Literacy Initiative Grant	
TOTAL REVENUE	

PROJECT EXPENSES	Grant Amount
Salaries and Benefits	
Total Salaries and Benefits	
Other Expenses	
Total Non-Staff Expenses	
TOTAL EXPENSES	

IN-KIND RESOURCES (Optional)	
Description	Amount
TOTAL IN-KIND RESOURCES	

Part III: Supporting Documents

Please include the following documents with your online application:

- Copy of the most recent organization Annual Profit and Loss Report or Annual Audited Financial Report (School districts and state/community colleges please provide adult education related information only.);
- Current Operating Budget;
- Copy of IRS tax-exempt determination letter (for non-profits only); and
- Other supporting materials (i.e. letters of support, newspaper articles, etc.) are optional and, if included, must be limited to 2 pages.

Formatting and Delivery Notes:

- Proposals should be typed using a 12-point font (Times or similar), formatted with one-inch margins on all sides and include page numbers.
- The proposal (including the budget) should be limited to five pages and be submitted online as one PDF document.
- Supporting documents (detailed above) should be submitted separate from the proposal in the designated areas on the application website.
- Proposals must be submitted by **August 24th, 2018**.

Applications that do not comply with the application guidelines and instructions may not be reviewed. Please do not fax or e-mail applications. Upon receipt of a proposal, an acknowledgement will be e-mailed to the applicant. For your convenience, you may refer to the enclosed application checklist.

Please contact Heather Surrency at surrencyh@floridaliteracy.org or 407-246-7110, ext. 209, if you have questions.

Thank you and we look forward to your application!