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**Florida Financial Literacy Initiative**

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

**2017 APPLICATION**

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# Part I: Coversheet *(Please return this form with your grant application)*

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| --- | --- |
| Organization: | |
| Program Name (if applicable): | |
| Address: | |
| Contact Name and Title: | |
| Phone: | Fax: |
| E-mail: | Website: |

**Your organization’s\* total annual operating budget: $**

\**If you are requesting funds for a literacy or educational program that operates within a larger entity, you must provide the specific budget for the literacy program versus the organizational budget: $*

**Number of adult basic education/literacy, ESOL and/or family literacy students provided instruction during the 2016 fiscal year:**

**Number of paid instructors:** **Number of volunteer instructors:**

**Number of students to be provided with instructional services under this grant:**

**County(s) served by this grant:** **Wells Fargo Region (See Guidelines):      \_\_\_\_**

**Does your organization charge a fee for instructional services?**

**If so, please explain:**

**Organization Type (please check one):**

Nonprofit Community-Based Organization State/Community College

School District Based Program Public Library

Other

**Has your program/organization otherwise addressed financial literacy before?**

**Part II: Narrative**

The narrative MUST be formatted in 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 number of students to be served and the projected number of instructional hours to be provided.

**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 2016 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 III:** **Budget**

Please provide a program budget, ensuring that items in the budget are clearly supported in the program description. 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:*

*ESOL Instructor (4 hrs per wk. @ $18.00 hr. for 30 weeks) $2,160*

*ESOL Instructor benefits (FICA, benefits) $350*

**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:*

*Supplies for student project $500*

*Classroom materials $200*

\*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 $24.14 per hour.

(Source: [http://www.independentsector.org](http://www.independentsector.org/volunteer_time?s=volunteer%20value))

**2017-2018 BUDGET**

|  |  |
| --- | --- |
| **REVENUE** | **Amount** |
| Florida Financial Literacy Initiative Grant |  |
|  |  |
|  |  |
| **TOTAL REVENUE** |  |

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

|  |  |
| --- | --- |
| **IN-KIND RESOURCES** |  |
| **Description** | **Amount** |
|  |  |
|  |  |
|  |  |
| **TOTAL IN-KIND RESOURCES** |  |

**Part IV: Supporting Documents**

In addition to the coversheet, narrative, and budget please provide the following with your application:

* Copy of the most recent organization Annual Profit and Loss Report or Audited Financial Report; (School districts, state/community colleges and libraries please provide adult education financials only.)
* Current Operating Budget;
* List of the organization’s three largest sources of funding; and
* Copy of IRS tax-exempt determination letter (for non-profits only).
* 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:**

* The proposal (including the budget) should be limited to five pages in addition to the cover sheet and supporting documents.
* Proposals should be typed and printed on white paper, using a 12-point font (Times or similar) and one-inch margins on all sides; pages should be numbered. E-mailed proposals will not be accepted.
* Proposals should not be placed in binders or folders; one staple or paper clip in the upper left-hand corner, securing all pages, is sufficient.
* Programs should submit the original and five copies of the proposal and optional 2 page supporting materials. Only one copy of remaining support documents (budget, audit etc.) is required.
* All materials must be received by **August 21, 2017** (Deadline extended)

Please mail/deliver completed application to:

Florida Literacy Coalition, Inc.

Attn: Financial Literacy

235 S. Maitland Ave

Suite 102

Maitland FL 32751

Applications that do not comply with the guidelines and application instructions or that include materials not specifically requested 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 email Heather Surrency at [surrencyh@floridaliteracy.org](mailto:surrencyh@floridaliteracy.org) for more information.

Thank you for your interest, and we look forward to your application!