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| **United Way of Greater St. Louis**  **2021 ASSET Program Application**  **DEADLINE: Friday, February 10, 2021 at 5pm**  **Complete online at** [**https://www.surveymonkey.com/r/ASSET21App**](https://www.surveymonkey.com/r/ASSET21App) | |
| **Organization Name** |  |
| **Federal Tax ID Number** |  |
| **Headquarter Address** |  |
| **City, State, Zip Code** |  |
| **Address where program will be delivered (or indicate online)** |  |
| **City, State, Zip Code** |  |
| **Website URL** |  |
| **Executive Director/CEO Name** |  |
| **Executive Director/CEO Email** |  |
| **Executive Director/CEO Phone** |  |
| **Primary Contact Name (if different)** |  |
| **Primary Contact Title** |  |
| **Primary Contact Email** |  |
| **Primary Contact Phone** |  |
| **Year of Incorporation** |  |
| **Accreditation Body (if applicable)** |  |
| **Total Agency Budget** |  |
| **Total Requested Amount** |  |

**SECTION I: AGENCY NARRATIVE**

1. Briefly describe your agency’s mission, vision, values, and how this program fits with your strategic goals.

**SECTION II: PROGRAM NARRATIVE**

1. How many participants do you intend to enroll in the ASSET program? (United Way encourages you to over-enroll participants as it is unlikely all will complete classes.)
2. Based on the number of participants you anticipate will **complete the financial education portion** of the program, what grant amount are you requesting?

\_\_\_\_\_\_ (# of participants) x $250 = $\_\_\_\_\_\_\_ (total amount of grant request, maximum $5000)

1. The ASSET program is meant to primarily target parents/caregivers who have minor children. Please describe the demographics of the population you plan to serve through this program.
2. Will you be offering the financial education classes:

* Online only
* In-person only
* Online and in-person (please describe) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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1. (Optional) In addition to class participants, up to 5 front-line (non-managerial) staff members may participate in the program. While the organization will not receive grant money for staff members, they will be eligible for the savings match and financial coaching support. How many staff members do you anticipate enrolling and what is their role in the agency?
2. Please provide the name(s) and address(es) of the proposed program site(s) and the projected number of participants who will be served at each site (if applicable.) If classes will be held online, please indicate what platform you will use (Zoom, WebEx, etc.) and whether you have used the platform previously.
3. How will you market the ASSET program and recruit participants?
4. Who will teach your financial education classes? Will classes be led by a volunteer instructor, organization staff or will you utilize the online FDIC Money Smart modules? Will you need assistance locating instructors?
5. Who will you work with to provide budget and credit counseling? (Justine Petersen, Prosperity Connection, Community Action Agency, organization staff or other.)
6. How will you deliver participant reminders and follow-up?
7. How will your organization provide support to participants throughout the program?
8. Data for the ASSET program is tracked via Excel. Who will be responsible for entering participant information and tracking attendance?
9. How has your organization run programs since COVID 19? (Have you successfully moved to online classes/activities? Have you offered in-person, socially distanced sessions?)
10. You will need to select one staff member to be the ASSET program manager for your organization. Provide the credentials and competencies of the staff who will be responsible for managing the program (i.e. resume or paragraph describing applicable background and experience). If the person has not yet been hired, please provide job description.

**SECTION III: PROPOSED BUDGET**

1. What will the grant funds be used for? Complete the budget template below:

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|  | **Proposed ASSET Program Budget** |
| Technology |  |
| Childcare |  |
| Food |  |
| Transportation |  |
| Staff support |  |
| Incentives |  |
| Other: (please describe) |  |
| **Grant Total (max $5000)** |  |

Please give a detailed description for how you plan to use the funds (staff support, food, transportation, childcare, financial education materials, technology needs such as hotspots, tablets, etc.). Program funds are