



## NAIW INTERNATIONAL LEGACY FOUNDATION

### GRANT APPLICATION

The NAIW International Legacy Foundation is pleased to support the Grant Program funding education-related programs and projects benefiting the insurance industry. The objective with these grants is to reward local associations, councils and regions for creating programs that effectively educate our members on a peer-to-peer basis. Grants are awarded at the discretion of the Legacy Foundation Board of Directors.

#### SUBMISSION GUIDELINES

- Each local association/council/region is allowed one submission per submission period. Multiple associations can collaborate on a submission, but there will only be one award for each program.
- All applications and supporting documents **must** be typewritten and submitted within the specific award period and submitted via the [online form](#) to be considered.
- No late or incomplete applications will be accepted. Highlights of each section are included to assist in ensuring all aspects of the application are completed.
- Grants will only be awarded for programs to be held after the decision announcement date. No past events, or events occurring prior to the decision announcement date, will be considered. Please note amount awarded may be less than amount requested.
- Please provide the following information with the application:
  - **Purpose of Request:** Include why your local association/council/region is interested in hosting this program and requesting the grant. If you have applied for and/or received other funds for this same purpose, please provide details of that application.
  - **Background on Local, Council or Region:** Please tell us about your local association/council/region and why you need this grant.
  - **Program Description:** Provide a brief description (maximum length – two pages) of the program’s content and design.
  - **Project Budget:** Outline the budget associated with the course/program.
  - **Speaker Bio and Fee:** If requesting support for an educational program speaker, please provide the speaker bio and fee.
  - **Marketing Plan:** Provide a high-level overview of the marketing plan you will undertake to promote this program.

**NAIW International Legacy Foundation**  
2501 Jolly Rd, Suite 110  
Okemos, MI 48864  
[www.naiwlegacyfoundation.org](http://www.naiwlegacyfoundation.org)

Updated 12/2023

## SELECTION CRITERIA

- Applications will be reviewed by the Legacy Foundation Board of Directors.
- Local associations/councils/regions will abide by all criteria, as outlined in this document.
- The speaker and/or program must fit with the [mission and values](#) of the Legacy Foundation.

## APPLICATION DEADLINE AND TIMELINE

- **Application Submission Deadline:** Grant applications will be accepted until October 15 at 11:59 p.m. EST for the first application period and until March 15 at 11:59 p.m. EST for the second application period.
- **Grant Selection:** All grant applicants will be notified of the selection decision by November 15 for the first application period and by April 15 for the second application period.
- **Program Completion:** All programs must be completed within 12 months of receipt of the grant.

Submit all application materials via the online form at: <https://naiwlegacyfoundation.org/grants/legacy-foundation-grant-application/>

Emailed, mailed or faxed applications will not be considered.

## GRANT MANAGEMENT

- Grant funds will be distributed by November 15 for the first application period and by April 15 for the second application period. PLEASE NOTE: grant amount awarded may be less than amount requested.
- The Legacy Foundation, as well as other relevant sponsors, will be recognized during the delivery of the program. Such recognition includes showcasing the Legacy Foundation's logo (found online under "Forms", in the Members Only section of the website) and mentioning the Legacy Foundation during the session's opening statement.
- A written report detailing the program's success should be provided to the Legacy Foundation within 60 days after the completion of the program and include attendance numbers.

## QUESTIONS?

Please contact Executive Director, Tiffany Bukoffsky, with questions at [director@iaip-ins.org](mailto:director@iaip-ins.org) or 404-789-3153.

**NAIW International Legacy Foundation**  
2501 Jolly Rd, Suite 110  
Okemos, MI 48864  
[www.naiwlegacyfoundation.org](http://www.naiwlegacyfoundation.org)

Updated 12/2023



## NAIW INTERNATIONAL LEGACY FOUNDATION GRANT APPLICATION

### APPLICATION CHECKLIST

Only complete applications will be reviewed by the board of directors. All sections must be completed. Grant applications will be accepted until no later than October 15, 11:59 p.m. EST for the first application period and until March 15 at 11:59 p.m. EST for the second application period.

- Section 1: Grant Request Details
- Section 2: Contact Information
- Section 3: Purpose of Request
- Section 4: Background on Local, Council or Region
- Section 5: Program/Course Description (*maximum length – two pages*)
- Section 6: Project Budget
- Section 7: Speaker Bio and Fee (*if a speaker is needed*)
- Section 8: Marketing Plan
- Section 9: Authorization

### SECTION 1 – GRANT REQUEST DETAILS

**Association Level:**

*(select one)*

Local: \_\_\_\_\_

Council: \_\_\_\_\_

Region: \_\_\_\_\_

**Program Project Name:** \_\_\_\_\_

**Program Date:** \_\_\_\_\_

*Grants will only be awarded for programs to be held after the decision announcement date.*

**Grant Amount Requested:** \_\_\_\_\_

*Grant amount awarded may be less than amount requested.*

**NAIW International Legacy Foundation**

2501 Jolly Rd, Suite 110

Okemos, MI 48864

[www.naiwlegacyfoundation.org](http://www.naiwlegacyfoundation.org)

Updated 12/2023

SECTION 2 – CONTACT INFORMATION

Provide the contact information for the individual that will manage the grant application and process

**Contact Name:** \_\_\_\_\_  
**Phone Number:** \_\_\_\_\_  
**E-Mail:** \_\_\_\_\_

**Payment Information:** If awarded the grant, provide the details on who the grant payment should be made payable to and mailing address.

**Payee:** \_\_\_\_\_  
**Address for Payment:** \_\_\_\_\_

SECTION 3 – PURPOSE OF REQUEST

Include why your local association/council/region is interested in hosting this program and requesting the grant.

Have you applied for and/or received a grant for this same purpose?  Yes  No

*If yes, please provide details of that grant and date that the program report was submitted to the Legacy Foundation.*

---

#### SECTION 4 – BACKGROUND ON LOCAL, COUNCIL OR REGION

Provide an overview of your local association/council/region and how this grant will benefit the organization.

#### SECTION 5 – PROGRAM/COURSE DESCRIPTION

Provide a brief description (*maximum length – two pages*) of the program’s content and design.

#### SECTION 6 – PROJECT BUDGET

Outline the budget associated with the course/program. (*If needed, attach additional sheets with the budget details*)

## SECTION 7 – SPEAKER BIO AND FEE

If requesting support for an educational program speaker, provide the speaker bio and fee details.

## SECTION 8 – MARKETING PLAN

Provide a high-level overview of the marketing plan you will undertake to promote this program.

## SECTION 9 – AUTHORIZATION

This form requires two signatures

### Association President

---

Signature

Date

### Association Officer (President-Elect, Secretary, etc.)

---

Signature

Title

Date

### Council Director or Regional Vice President

---

Signature

Title

Date

### Custodian of Funds (Treasurer)

---

Signature

Title

Date