

**GREATAMERICA EMPLOYEE ADVISED FUND**

**2024 GUIDELINES**

purpose:  
The GreatAmerica Financial Services Employee Advised Fund supports programs that enhance the quality of life and community development within the communities where employees live and work in the Cedar Rapids/Iowa City Corridor.

DEADLINE:  
Friday, March 29, at 4:30 p.m. Central Time.

PRIORITIES:

* **Health and Human Services**: Care for underserved individuals such as food, shelter, and medical care
* **Arts and Culture:** Programs with emphasis on participation
* **Environment:** Projects and programs that provide education and/ or protect the environment
* **Public Projects:** For community good such as non-governmental recreational facilities

ORGANIZATION ELIGIBILITY:   
Applications accepted only from IRS 501 (c) (3) approved non-profit organizations.

Eligible applicant organizations must be located in Benton, Johnson, Jones or Linn County.

INELIGIBLE ACTIVITIES:

* Administrative or overhead expenses
* Expenses for projects/programs that have already occurred or will occur during the grant review process (approximately 8 weeks total following deadline date)
* K-12 education or extracurricular activities
* Religious activities or expenses for religious purposes in any form
* Political activities
* Re-granting funds to other non-profits

REQUEST AMOUNT / AWARD RANGE:

* Organizations may request/receive $1,000- $25,000 in either a single grant or two smaller grants in 2024.
  + Request amount may not exceed 50% of total project budget.
  + Organizations with operating budgets less than $125,000 may request/receive an amount up to 20% of their operating budget per request (rounded up to the nearest $100).

Duration of grants:  
12 months

**HOW TO APPLY**

1. Visit [https://gfsc.smapply.io/](https://nam12.safelinks.protection.outlook.com/?url=https%3A%2F%2Fgfsc.smapply.io%2F&data=05%7C02%7Crochelle.naylor%40gcrcf.org%7Ced994007646748ea277608dc29b8d5f1%7Cc057518d4b044074a2ba268bb1d23a9f%7C0%7C0%7C638431121052964157%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=bVM%2FCscTY0o9Kxgy9vlOfK6jcWU5JSEs8YyBMp8Bf6M%3D&reserved=0).
   1. If you’re a returning applicant, click “Log In” in the top-right corner. *Skip to Step 7.*
   2. If you’re a first-time applicant, click “Register” in the top-right corner. *Continue to Step 2.*
2. Create a new SMApply account following the on-screen instructions.
3. Check your email inbox for the confirmation link. You won’t be able to submit applications or complete certain tasks until your email address has been verified.
4. Click “Confirm email address” and then click “Continue” on the “Thanks” screen.
5. Click “View programs”
6. Click “Fill out eligibility profile” and complete the Eligibility Quiz.
7. *(Skip if first-time applicant)* If you’re a returning applicant, after you login, you’ll first see “All Applications.”
8. *(Skip if first-time applicant)* To begin the application process, click “Programs” in the top navigation menu.
9. You will see a program titled “GreatAmerica Employee Advised Fund (Year).” Click “More” to open the application process.
10. Complete the application.

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| APPLICATION CHECKLIST: |  | |
| * Application responses completed in this document | | Recommended |
| * Online application completed | | Required |
| * Project budget document completed and uploaded (optional form available) | | Required |
| * REQUIRED organization financial statements:   Most recent Balance Sheet and Profit/Loss Statement  *The Balance Sheet (sometimes called the Statement of Financial Position) is a financial statement that reports the assets, liabilities, and equity of the organization on a given date. The Profit/Loss Statement (sometimes called the Statement of Financial Activities or the income and expenses statement) summarizes the revenues, costs, and expenses incurred by the organization during a specific period of time.* | | Required |

Questions:   
Questions about eligibility or application process? Contact Rochelle Naylor at the Greater Cedar Rapids Community Foundation at [rochelle.naylor@gcrcf.org](mailto:rochelle.naylor@gcrcf.org)

Questions about navigating or using the portal software? Contact John Wiedenheft at GreatAmerica Financial Services at [jwiedenheft@greatamerica.com](mailto:jwiedenheft@greatamerica.com)

**APPLICATION QUESTIONS**

**Organization Contact Information**

Organization name:

Tax ID:

Name of organization primary contact: This is the Executive Director, Board Chair or organization President.

Address information:

Website address:

Organization phone number:

Primary contact organizational role:

Primary contact phone and extension:

Primary contact email:

**Submission Information**

Who should we contact with questions regarding this specific application?

Application contact’s organizational role:

Application contact’s phone and extension:

Application contact’s email:

**Organization Background**

What is your organization’s purpose or mission statement and geographic service area?

Provide a brief organizational history.

Please list and briefly describe the primary programs and/or services of the organization.

Number of paid employees

Total dollar amount of the current fiscal year organization budget

List of Board of Directors’ names and professional roles (limited to ten board members)

**Proposal Title:**

Use a title that describes the program or project*.* (*10-word limit.)*

**Section 1: Proposal Summary**Proposal Summary Statement: Provide a two-three sentence summary of the project/program. The application answers and project budget in this application should align with the proposal summary.

What priority does this project/program fit into? (dropdown)

Type of Request (check one): Program Based Capital Based  
*Program Based = Programmatic or project support • Capital Based = The building of or physical improvement of something*

Total Project Budget inclusive of all funding: (Dollar amount answer)

What is the amount of funding already committed to the program/project? (Dollar amount answer)

Amount requested from this grant program (limited to no more than 50% of total project budget): (Dollar amount answer)

Name of GreatAmerica team member(s) who provided the referral for this grant opportunity. (Required, with a limit of ten)

**Section 2: Proposal Details**Explain the proposal. Describe how the project/program will be carried out outlining the relevant activities and timelines. (500-word limit)

How will you measure the success of this project/program? (300-word limit)

How will this program/project impact the quality of life in the community? (300-word limit)

If this is a capital project:

How many bids did you receive for the proposed project/equipment/assistance? (Numerical answer)

How did you choose this bid over the others? (150-word limit)

What other support, if any, is the community providing to this program/project? (This may include in-kind support.) (150 word-limit)

**Section 3: People Served:**Estimate the total number of persons who will be served in each of the following groups:

Adults

Children (under 18 years old)

Average income level of households served

**Section 4: Team Member Involvement:**Please list any GreatAmerican team members serving on the organization’s Board of Directors:

Are there opportunities for GreatAmerica team members to support or volunteer with this effort outside of working hours? Please explain. (150-word limit)

**APPLICATION CRITERIA**

* Eligibility:
  + Application fits one of the Fund priorities.
  + All expenses for which funding is requested are eligible.
* Quality of application:
  + Proposal summary, application answers, and project budget are aligned.
  + Project/program appears well thought-out.
  + Success of program/project is clearly described.
* Impact: project/program is likely to have a positive impact on the quality of life in the community.