



Wisconsin Bankers Foundation 2023–24 Grant Guidelines

Background

The Wisconsin Bankers Foundation invests its resources in specific projects and initiatives that further its exempt purpose of promoting financial literacy and financial responsibility to the public. Foundation grants will target areas including financial education classroom projects, financial education training, books and manuals, and financial literacy research. The Foundation will provide grants to registered 501(c)(3) organizations and certain government instrumentalities, such as public school districts. In limited circumstances, the Foundation may provide grants to organizations that do not meet this requirement, provided those organizations use grant funds to further the Foundation's exempt purpose. Such organizations will be required to enter into a restricted grant agreement as a condition to receiving grant funds from the Foundation.

Grant Awards

The number of awards and level of funding will be at the discretion of the Foundation Board of Directors. Typical award amounts range from \$500–\$5,000 and will be determined based on the annual priorities of the Board and the available funding. Multi-year grants are possible.

Guidelines

The Foundation will accept grant proposals for both new and ongoing initiatives and research projects.

The following categories of proposals will be given priority:

1. Providing training or training materials to educators for the purposes of teaching financial education and/or
2. Research that relates to financial education, the banking industry, and consumer financial products.

Grants awarded for research related to financial literacy are conditioned on such research being completed within one year of the grant award. Recipients are expected to acknowledge assistance provided by the Foundation in any publication resulting from their research.

Criteria

Projects supported by the Foundation must:

1. Produce tangible activities that directly benefit Wisconsin community members,
2. Be conducted in Wisconsin, and
3. Align with the Foundation's mission of empowering financial decisions through education and/or research.

The merits of each application will be evaluated based on the following categories:

1. Quality and innovativeness of the project
2. Reach — scope of the project on a statewide scale and/or targeted to underserved communities
3. Feasibility — ability of the applicant to carry out the proposed project
4. Impact of the WBF award on the project



Selection

The Foundation Board of Directors will evaluate applications and select award winners in two cycles per year.

1. **Cycle 1** applications will be accepted through Friday, October 27, 2023. Winners will be notified by Friday, December 1, 2023. Award materials will be distributed by Friday, December 15, 2023.
2. **Cycle 2** applications will be accepted through Friday, March 29, 2024. Winners will be notified by Wednesday, May 1, 2024. Award materials will be distributed by Friday, May 17, 2024.

Awards are publicized in appropriate professional media and on the Foundation website, www.wisbankfoundation.org.

Contact

Questions may be directed to Cassandra Krause, WBF executive director, at ckrause@wisbank.com or 608-441-1216.