

FINANCIAL EDUCATION INNOVATION FUND: SPRING SEMESTER 2016

MANDATORY FORMS CHECKLIST

On or before December 18, 2015¹:

The original complete hardcopy response, and an electronic copy of the complete hardcopy response contained on one (1) USB stick (or equivalent USB storage device) of the following must be delivered in the same package. The hardcopy response must contain original ink signatures on the required forms. The response shall include the following:

- Part 1 - Grant Application Form
- Part 2 - Required Program Description
- Part 3 – Proposed Budget and Narrative
- Part 4 – Commonwealth Forms (**Original Wet-ink Signature**)
 - Commonwealth Terms and Conditions Form*
 - Contractor Authorized Signatory Listing Form*

Due immediately upon notification of a successful grant application:

- Massachusetts Standard Contract Form (Original Wet-ink Signature)*

This will be sent to those awarded a grant. It is not required as part of initial grant application process.

All required documents should be mailed or hand-delivered to: Massachusetts State Treasury, Office of Economic Empowerment, Attn: Leanne Martin Fay, One Ashburton Place -12th Floor, Boston, MA 02108

Part 1. Grant Application Form

Name of Fair: _____ Anticipated Date / Location: _____

School District Tax I.D. Number: _____

School District Business Office* / Primary Contact Person: _____

Mailing Address: _____ Email Address: _____

Office Phone: _____ (Optional) Cell Phone: _____

Participating School(s): _____

Fair Coordinator/ Primary Contact Person: _____

Phone Number: _____ (Optional) Cell Phone: _____ Email Address: _____

Type of Funding Request (Circle One): _____

Innovation Funding (Up to \$2,500) or Seed Funding (Up to \$5,000)

Total Amount Requested _____

Total anticipated number of students served at fair: _____

[For schools seeking Innovation Funding]

In the past, how many students has your fair served: _____

How many more students will be participating in the fair, if your school is awarded: _____

¹ Please note the original deadline was December 4, 2015, however this deadline was extended to December 18, 2015.

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Part 2. Required Program Description²:

a. Describe in 400 words or fewer:

- How is your program sustainable³?
- How does your program prepare students for the fair?

b. Respond to the following:

- What makes your fair different? Please share one or more element(s) about your fair that you would like to share with other schools in the state?
- In the past, have you evaluated your fair success? If so, please include a copy of your evaluation method (questionnaire, survey, evaluation form, etc.) with your required documents for informational purposes.

- Provide a list of booths and the financial decisions that will be simulated at your fair? Some examples include:

Housing	Transportation	Luxury/Leisure
Clothing	Part-time job	Credit Counseling
Credit (Lending)	Transportation	Saving
Insurance	Health/Nutrition	Retirement
Furniture	Education	Dress for Success

- Provide a list of what organizations and/or individuals are involved in the fair? Please indicate if entities are donating planning time, volunteers, funding, etc. Some examples of these organizations are:

- Non-profit organizations
- Financial institutions
- Colleges
- Parent-Teacher Organizations/Associations
- Alumni associations
- Local businesses

Please visit www.mass.gov/treasury/innovationfund for the following Required Forms

Part 3. Proposed Budget & Narrative (Excel Doc.)

Part 4. Commonwealth Forms (Original Wet in Signature)

- Commonwealth Terms and Conditions Form
- Contractor Authorized Signatory Listing Form

Frequently Asked Questions: For more details about the application requirements.

Please do not hesitate to contact the Office of Economic Empowerment if you have any questions.

E-mail: empowerment@tre.state.ma.us Call: Leanne Martin Fay at 617-367-9333 Ext. 613.

²If awarded grant, these details may be used in press releases, website, and other program related publications.

³Fairs will be viewed as sustainable by clearly articulating how it makes a positive impact on student learning, as well as, ways in which the planning committee practices cost effectiveness and adaptability to changes over time.