TEXAS FINANCIAL EDUCATION ENDOWMENT
2026-2027 GRANT APPLICATION

Answer the following screening questions to determine whether or not your organization is eligible to apply for a grant from the Texas Financial Education Endowment. Answering "yes" to any of these questions will make the organization ineligible and the application will not be reviewed.

ELIGIBILITY CHECKLIST		YES	NO
1.	Does the organization hold a license or registration regulated by the Texas Finance Commission?	◉	○
2.	Will any of the funds be used to create a new company or business venture?	○	○
3.	Will any of the funds be used to pay tuition for a staff member to attend college or professional school?	○	○
4.	Will any of the funds be used to support individuals who do not reside in Texas?	○	○
5.	Will the organization require the entire grant amount requested to sustain the program or business operations (i.e., the applicant will not be able to supplement or adjust the program budget if a lesser amount is awarded)?	○	○
6.	Will any of the funds be used to purchase capital expenditures (e.g. land, real estate, construction of a new building)?	○	○
7.	Does the organization object to or anticipate issues complying with the reporting requirements listed in the Grant Application?	○	○
8.	Does the funded program have difficulty adhering to state and federal Equal Employment Opportunity laws?	○	○
9.	Will any of the funds be used to support programs or activities that do not align with the TFEE mission and objectives identified in the Grant Application?	○	○

I. CONTACT INFORMATION

Name of Organization:	
Website:	
Primary Contact **Name:** **Position or Title:** **Email:** **Phone:**	**Head of Organization** **Name:** **Position or Title:** **Email:** **Phone:**
Mailing Address:	**Physical Address (if different from mailing):**
City, State: **ZIP code:**	**City, State:** **ZIP code:**

II. ORGANIZATION BACKGROUND

1. Date founded:	**2. Tax ID number:**
3. Legal name:	**4. DBA:**
5. # Full-time staff:	**6. # Part-time staff:**

7. Unduplicated number of individuals served in prior reporting year:

8. Organizations with whom you collaborate with and briefly identify how:

9. Organization mission statement:

10. Has the organization applied for TFEE funding before? If yes, which cycles?

11. Has the organization been a recipient of TFEE funds? If yes, which cycles?

III. GRANT REQUEST INFORMATION

1. Program title:

2. Date Program founded/anticipated start date:

3. Brief description of grant request (100 or less):

4. Amount Requested (request may be up to $90,000):

5. Total project budget:

6. Is this program offered to participants at little to no cost? If no, please explain:

7. Grant term (refer to the grant instructions for guidelines): ◯ **One Year Term** ◯ **Two Year Term**

8. Grant category (refer to the grant instructions for guidelines):

◯ **K-12 Financial Education and Capability**

◯ **Adult Financial Education and Capability**

◯ **Financial Coaching**

9. Geographic area served: City/ies, MSA/s or County/ies:

10. Statewide (yes or no)**:**

1. State the purpose and goal(s) of the program, include the problem or need this program will address.

2. Identify the program's target audience. Briefly describe how you reach, affect, and maintain them.

3. Provide projected, unduplicated number of people to be served during the grant term.

IV. PROGRAM INFORMATION CONT.

4. Clearly identify an impactful program objective and performance measurement (outcome and output) to be tracked during the grant cycle, and outline the plan that will be used to achieve them. This objective will be reported on throughout the grant cycle.

Learning Objective Title	Insert Brief Headline
Description	Clearly communicate what you plan to accomplish. Objectives should be measurable, achievable, results-oriented, and time-limited.
Action Plan	Identify key actions/milestones and timing
Performance	Output: Identify performance output.
Measurement	Outcome: Identify performance outcome.
Required Resources	Identify which resources will require grant funds.

IV. PROGRAM INFORMATION CONT.

5. What type of curriculum will be used? If K-12, how will the curriculum align with Texas Essential Knowledge and Skills (TEKS) standards. If not, please explain?

6. What, if any, evidence supports the program's approach to the listed objectives and identified outcomes?

7. Describe plans to support the program after the term of this grant.

8. Describe recent accomplishments of this program or successes with related projects (if this is a new program). Support documents may be included as an attachment.

9. Describe organization's capacity to deliver the program. Include a summary of key personnel/partners and their anticipated roles in the program. Attach biographies for key staff administering/implementing the program.

IV. PROGRAM INFORMATION CONT.

10. Indicate any anticipated, significant changes to the organizational structure, revenue stream or expenses in the next year.

11. Video Submission (RECOMMENDED): Please include 3 minute or less video showcasing the program proposal.

V. PROGRAM BUDGET

Provide a budget narrative to justify the requested funds and proposed expenses. Include a description of each line item used on the corresponding budget spreadsheet. If expenses exceed revenues by more than 10%, explain how the difference will be offset.

Program Budget

***Worksheet will automatically calculate when Tab is used to move between cells.**

Expenses	Total Projected Budget	Amount Requested from TFEE
Salaries and wages	$ 0.00	$ 0.00
Equipment	$ 0.00	$ 0.00
Supplies & materials	$ 0.00	$ 0.00
Travel	$ 0.00	$ 0.00
Telecommunications	$ 0.00	$ 0.00
Contract Services (consulting & professional fees)	$ 0.00	$ 0.00
Other:	$ 0.00	$ 0.00
Other:	$ 0.00	$ 0.00
TOTAL EXPENSES	$ 0.00	$ 0.00

Revenues	Committed	Pending
Contributions, gifts, grants, & earned revenue		
Local Government	$ 0.00	$ 0.00
State Government	$ 0.00	$ 0.00
Foundation	$ 0.00	$ 0.00
Corporations	$ 0.00	$ 0.00
Membership Income	$ 0.00	$ 0.00
Program Service Fees	$ 0.00	$ 0.00
Fundraising Events (net)	$ 0.00	$ 0.00
Investment Income	$ 0.00	$ 0.00
In-Kind Support	$ 0.00	$ 0.00
Other:	$ 0.00	$ 0.00
TOTAL REVENUES	$ 0.00	$ 0.00
DIFFERENCE (Revenue less expenses)	$ 0.00	$ 0.00

Attachments

Required

- ☐ Eligibility Checklist
- ☐ Key Program Staff Biographies (include role in the program, tenure with organization, and contact information)
- ☐ Organizational Chart
- ☐ Board list and affiliations
- ☐ Most recent IRS Form 990 (if applicable)
- ☐ Most recent financial statement (audited, if available)
- ☐ Previous two years of tax returns (if applicable)

Optional

- ☐ Program Summary/Impact report
- ☐ Examples of curriculum, evaluation and tracking tools
- ☐ 3 minute or less video showcasing program proposal
- ☐ Support documents to demonstrate accomplishments (research findings, news articles, awards, letters of support, etc.)

Statement of Authenticity

I do hereby certify that the appropriate governing body or individual of this organization has given formal approval for submission of this application and that all figures, facts, and representations made in this application are true and correct to the best of my knowledge. Submission of this application signifies intention to comply with all guidelines and restrictions imposed by the Texas Financial Education Endowment Grant Program and the Finance Commission of Texas.

I certify that any funds received with this application will not be used for lobbying and will be expended for the project described, and I understand that the organization may be precluded from future Financial Education Endowment funding if I fail to submit a final report at the conclusion of the grant period in form and detail as required by the Finance Commission.

Signature	Signature
Print Name	Print Name
Title	Title
Date	Date

Texas Public Information Act: As a state agency, the OCCC is subject to, and complies with, the requirements of the Texas Public Information Act (Chapter 552 of the Texas Government Code). The information provided on this application and any other materials submitted to the OCCC may be subject to public inspection or disclosure if requested under the Act. Certain confidential or exempt information may be specifically withheld by law, but any records not excepted must be provided when properly requested.