

**What information do I need in order to fill out the application?**

1. A program/project or event that fits within the [USAA Corporate Responsibility Strategy](#).
2. Organization federal tax ID number (also known as EIN. i.e. 12-1234567)
3. Organization operating budget
4. The itemized budget for the program/project or event for which you are applying
5. List of Board of Directors and their affiliations
6. Details on the program/project or event for which you are applying and its potential impact in the community
7. Details on how your organization plans to communicate successes and/or promote the program/project or event
8. Current signed W-9

**Questions Prior to Applying**

1. Does my organization have to be a 501(c) non-profit organization to apply for funds from The USAA Foundation, Inc.?
  - a. Yes. All organizations must be designated a 501(c) non-profit organization by the IRS and be in good standing.
2. May I discuss my organization's ideas for a grant or partnership with someone at USAA prior to applying?
  - a. USAA has limited staff to be able to discuss all proposal ideas prior to application. Before beginning an application, please refer to the [USAA Corporate Responsibility Strategy](#). If you feel your program/project or organization fits within the strategy, we invite you to apply.
3. May I submit a paper application in the mail or by delivery to USAA or to an individual employee at USAA?
  - a. Only applications that are submitted online through <https://usaa.versaic.com/login> will be considered. Paper applications or applications submitted through any way other than our online application will not be accepted or acknowledged.
4. May I apply for a grant below \$1,000?
  - a. No. The minimum grant request that will be considered is \$1,000.
5. What is the maximum grant my organization can apply for?
  - a. There is not a maximum amount that USAA will consider. However, the average grant awarded is between \$5,000-\$25,000. We hope that you will request what your program/project needs to be successful. Please note that USAA and The USAA Foundation, Inc. strive not to be the sole or majority (more than 25%) funder of organization's total operating budget.

6. Will USAA make partial grants (i.e. award a grant that is less than the amount requested)?
  - a. Yes.
7. Does USAA give grants to individuals?
  - a. No. USAA makes grants only to 501(c) non-profit organization as designated by the IRS.
8. Does USAA make grants to capital campaigns (i.e. bricks and mortar)?
  - a. No. To make measurable impact toward the [USAA Corporate Responsibility Strategy](#), USAA, the USAA Federal Savings Bank, and The USAA Foundation, Inc. only make grants to specific programs/projects at this time.
9. Will USAA fund staff salaries or general operations support as part of the overall program/project?
  - a. Yes. Because we understand that adequate staffing and operational support is required to run successful programs/projects, these costs are eligible components of the overall program/project budget.
10. May I apply multiple times in a calendar year for the same program/project?
  - a. Yes. However, we ask that if your program/project has been declined earlier within the same calendar year that you consider whether it is a true fit with the [USAA Corporate Responsibility Strategy](#).
11. May I apply multiple times in a calendar year for the same organization but different programs/projects?
  - a. Yes.
12. May I apply for multiple programs/projects within the same application cycle?
  - a. Yes, however you must submit separate requests for each program/project.
13. May our organization apply for multi-year funding?
  - a. No. Grant applications are accepted for one-time, non-recurring program/projects only at this time, unless otherwise requested by USAA or The USAA Foundation, Inc.
14. Do I need to be a member of USAA to apply for a grant?
  - a. No.
15. Am I able to preview the application questions before I begin?
  - a. Yes. Please see the link for the "Sample Application" on the application login page below the FAQ link.
16. Will the application form allow me to save my work and resume it at a later time?
  - a. Yes.
17. Will I know when my application has been received?
  - a. Yes. The person whose contact information is listed will receive a confirmation email upon receipt. That same person will receive an email

regarding USAA's decision in the timeline defined by the [USAA grant cycles](#).

18. May I contact someone at USAA to ask for status updates on my application?
  - a. USAA will proactively contact the person whose contact information is listed in the application with updates and/or requests for additional information (if applicable). Please do not contact USAA with requests for additional updates.
19. If I submit a grant request that I feel aligns with the [USAA Corporate Responsibility Strategy](#), is it guaranteed to be funded?
  - a. No. USAA endeavors to respond favorably to as many requests for funding as possible, however the amount of requests USAA receives exceeds the amount of funding available. If a grant request is declined, it is not a reflection of the program/project, event, or organization's merit. Not all requests, no matter how worthy, can be funded.

### **Preliminary Application Questions**

1. Does my organization have to be a 501(c) non-profit organization to apply for funds from USAA?
  - a. Yes. All organizations must be designated a 501(c) non-profit organization by the IRS and be in good standing.
2. Why do organizations need to be incorporated for three years or more to apply for funding from USAA?
  - a. USAA strives to give contributions to organizations with a proven track record of impact. The minimum three years of incorporation threshold is a way to advance that goal and is in alignment with best practices outlined by the Better Business Bureau's Wise Giving Alliance.
3. Am I able to preview the application questions before I begin?
  - a. Yes. Please see the link for the "Sample Application" on the Login homepage below the FAQ link.

### **Questions within the Grant Application**

1. Do you have a specific format for the operating budget?
  - a. No. You may submit your operating budget in the format in which your organization uses it, however the system will only accept files as PDF, Word and Excel documents.
2. How do I know how much of the amount I am requesting is Qualified, Non-Qualified, and for Meals/Entertainment?
  - a. "Qualified" refers to how much of the grant request is fully tax-deductible; "non-qualified" refers to the amount of goods and services received by USAA as a result of the grant (if applicable); "meals/entertainment" refers

to the amount of USAA’s contribution that would go to meals and entertainment at a luncheon, gala, or similar event (if applicable). If this grant will be fully tax-deductible, please insert the entire amount of the request in the “qualified” line. \*Note: each field must have a value, even if the value is “0.”

3. If my organization and/or program/project is located outside a 100 mile radius of one of USAA’s branded communities, may I apply for funding in the Families in Need, Education, Safety & Natural Disaster Response, Workforce Development/Education, Economic Development, or Arts and Culture focus areas?
  - a. No. At this time, funding in the Families in Need, Education, Safety & Natural Disaster Response, Workforce Development/Education, Economic Development, and Arts and Culture focus areas is limited to organizations and/or programs/projects located within a 100 mile radius of one of USAA’s branded communities (San Antonio, TX; Dallas, TX; Chesapeake, VA; Colorado Springs, CO; Las Vegas, NV; Phoenix, AZ; Tampa, FL; or Financial Center Locations).
4. Do you have a specific format for the program/project budget?
  - a. No, however please ensure it is in Excel format and that budget categories are itemized to give an accurate picture of how your organization plans to spend the funding. For example:

<b>Program/Project Budget</b>	<b>USAA Request</b>
Supplies \$1,000	\$500
Program Staff \$2,000	\$2,000
Marketing \$300	\$0
<b>Total \$3,300</b>	<b>\$2,500</b>

5. How do you define low-to-moderate income?
  - a. Low-income is an individual income that is less than 50 percent of the area median income or a median family income that is less than 50 percent in the case of a geography. Moderate-income is an individual income that is at least 50 percent and less than 80 percent of the area median income or a median family income that is at least 50 and less than 80 percent in the case of a geography.
6. What is the difference between Financial Literacy and Financial Readiness?
  - a. USAA distinguishes between Financial Literacy and Financial Readiness primarily by audience: Financial Literacy is targeted toward children and teaching them about money, budgeting, saving, etc. Financial Readiness is targeted to young adults (18-25 years old) and adults to improve financial behaviors, habits, stability, and security.

7. Why is a signed Form W-9 required?
  - a. If your program/project is selected for funding, a signed Form W-9 is required in some cases for funding. Having an uploaded version allows USAA to complete the funding more quickly.
8. May we send additional support materials by mail or delivery to USAA, the USAA Federal Savings Bank, The USAA Foundation, Inc., The USAA Educational Foundation, or a specific USAA employee?
  - a. No. The online application allows for additional uploads into the application, which you are welcome to utilize, however any additional materials submitted in ways other than through <https://usaa.versaic.com/login> will not be accepted or acknowledged.

### Questions for after Grant Submission

1. When will my organization receive notification of a decision by USAA?
  - a. The primary contact you list in the grant application can expect to receive notification of a decision via email on or before the decision date listed for the grant cycle in which they applied for. Click [here](#) to review the USAA grant cycles.
2. May I contact someone at USAA to ask for status updates on my application?
  - a. USAA will proactively contact the person whose contact information is listed in the application with updates and/or requests for additional information (if applicable). Please do not contact USAA with requests for additional updates.
3. If my organization is selected for funding, how soon will we receive the funds?
  - a. Grant funding will be electronically routed into your organization's account within 45 days of being notified of grant funding.
4. If my organization receives funding, may we use USAA and/or The USAA Foundation, Inc.'s name and/or logo wherever we choose?
  - a. You may use the USAA or The USAA Foundation, Inc. name on your website; however, you must request permission for usage of the brand/logo on any materials by contacting your designated USAA staff contact. Likewise, please do not issue a press release about the funding without first contacting and consulting your program officer.
5. If my organization or program/project receives funding, should we expect to receive funding for the same program/project in the future?
  - a. No. Funding is awarded on a one-time, non-recurring basis unless otherwise specified.
6. If my grant application is declined, what are some reasons that may have happened?

- The proposed program/project has gaps in alignment to USAA's Corporate Responsibility Strategy. You can learn more about USAA's strategy [here](#).
- Your program/project takes place outside of USAA's targeted service area. You can review USAA's targeted communities [here](#).
- Funding limitations. USAA receives many worthy funding inquiries, more than there are funds available, and we cannot support every request we receive.
- Other programs/projects demonstrated the potential to make a larger, deeper and/or more lasting impact on USAA's targeted strategies and/or communities. USAA's grant application process is competitive, and each application is evaluated against the others that have been received during the grant cycle. USAA strives to award grants to organizations that demonstrate the potential to make a large, deep, and/or lasting impact on the strategic focus areas identified above in the communities where USAA has a physical location and significant employee presence.
- Incomplete or unclear application. Issues such as unclear goals/objectives and/or program/project activities; questions about the organization's capacity to complete the program/project successfully; and excessive spelling or grammatical errors impact USAA's decision on what requests it supports.