

UNITED METHODIST FOUNDATION OF WESTERN PENNSYLVANIA Grant Application Packet

Suggestions for Preliminary Preparation

1. Be clear about your organization's priorities and your purpose in seeking funds.
2. Identify and research the agencies and organizations that make grants to the type of activity for which your organization is seeking funding. Make sure the purpose of your proposal fits within the Foundation's guidelines concerning the types of projects that are eligible for funding and the geographic area to be served. The Foundation reserves the right to reject any application that does not comply with its guidelines.
3. Contact your best prospects to identify application deadlines, funding cycles, and any additional application requirements, such as number of copies the grant-maker requires.
4. Include in your proposal a one-page cover letter that conveys the following information in simple terms:
 - Name of the project
 - The project's purpose
 - A strategic reason for the Foundation to fund the project
 - Amount requested
 - Time period of the project
 - Name of the contact person

The letter should be signed by the board/council president or chairperson and the pastor of the church or executive director of the organization. (If your proposal is a collaborative request, signatures of participating organization representatives must be provided.)
5. Include a one-page Executive Summary of the project. The Executive Summary should focus on the major points of the proposal, including a brief description of the proposed project, whom it serves, why it's important, and why your organization should receive the funds to implement it. The Executive Summary should excite and inspire the reader to review your full proposal. It should also provide the essential information in a concise manner.
6. Adhere to the guidelines of the *Grant Application Format* so your proposal is not delayed during the review process. Anticipate a funding source's concerns. If a question is not applicable, explain; if a problem exists that might detract from the credibility of your organization or project, address it briefly, but do not dismiss it.
7. Do not send videotapes or unsolicited information.
8. Questions or clarifications can be e-mailed to info@umfoundation.org; or call 1-800-743-2128.

Grant Application Cover Sheet

Date of Application _____ Annual Accounting Period _____

Legal Name of Organization Applying _____

Year Founded _____ Current Annual Operating Budget of Church/Organization \$ _____

Are you currently receiving funding from other United Methodist agencies or committees? Identify projects and amounts:

_____ \$ _____

_____ \$ _____

_____ \$ _____

Pastor or Senior Administrator _____

Contact Person/Title (if different from Pastor or Senior Administrator)

Address (principal/administrative office) _____

Mailing Address, if different from above _____

City _____ State _____ ZIP _____

Phone Number _____ FAX Number _____

Project Name _____

Purpose of Grant (one sentence) _____

Beginning and Ending Dates
of the Project/Campaign _____

Amount Requested \$ _____ Total Project Cost \$ _____

Geographic Area Served _____

Signature
Board/Council Chairperson _____ Date _____

Typed Name and Title _____

Signature Pastor or Senior Administrator _____ Date _____

Typed Name and Title _____

Grant Application Format

Please structure your proposal to provide the following information in the order indicated. Use the headings and subheadings provided. Then, in your own words, address the questions and issues posed in the outline. The questions reflect the general interests and concerns of grant-makers, but are not intended to be conclusive. Additional information pertinent to your project should be included. **Please be thorough, yet strive for brevity.** Although tightly written proposals are preferred, take the space you need to make your case.

A. Narrative

1. Organization Information

- State your mission and goals.
- Identify future challenges and long-range plans.
- Confirm that this project is endorsed by the governing body of your organization and is part of a long-range plan for ministry in the community. Attach relevant long-range plan excerpts.
- Outline current projects and activities, with emphasis on accomplishments.

TIP: Differentiate yourself from similar or competing organizations.

2. Purpose of Grant

- Describe the proposed project.
- Identify the needs/problems to be addressed, target population, and number of people to be served by the project.
- Describe the project goals and objectives, and your plan to meet them.
- Define the project as a new or continuing project.
- Identify other organizations, partners, or funding sources participating in the project and their roles.
- Provide a timetable for implementation.
- Identify long-term funding resources.
- Identify similar projects or services currently provided.

TIP: If a similar project or service has been conducted by your organization or another, please discuss its impact. Does it represent an expansion or duplication of services in your area? If it doesn't, define its potential to serve as a model project locally or nationally.

3. Evaluation

- Describe your plan to document progress and results. Interim and final evaluation and expenditure reports will be required for every grant awarded.

TIP: Set measurable goals for the project and specify your plans to communicate with the Foundation during the grant period.

B. Attachments

Please include the following attachments in the order indicated:

1. Copy of the current IRS determination letter indicating 501(c)(3) tax-exempt status (only required for non-parish institutions)
2. Statement verifying payroll tax payments
3. Organizational structure, including:
 - List of officers and directors, including relevant affiliations
 - Descriptions of key personnel involved in the project
4. Finances, including:
 - Grant budget for project requested in grant application; refer to *Grant Application Budget, Sections B and C*
 - List of other funding sources, potential funding sources, and amounts committed or requested, including public contracts, individual contributions, and other sources of income supporting the project
 - Current board-approved annual operating budget of the church or organization requesting grant, including expenses and income
 - Most recent audited annual financial statement
5. Letters of support (optional) that substantiate need for the project and collaboration with other organizations
6. Annual report, if available (Charge Conference format)
7. Overview of any capital campaigns undertaken in the last five years

Grant Application Budget

(Detailed budget for proposed projects)

An accurate, detailed budget for proposed projects is a primary requirement of every grant-maker. This portion of your proposal should break down the total budget into the specific items listed below. A narrative description explaining unusual budget items and, if applicable, the percentage of “overhead” applied to the project should precede the itemized listing. “In-kind” expenses and donations or matching funds should also be spelled out. As long as your budget is typewritten and contains the following information, feel free to submit it in a format comfortable and convenient for you.

A. Heading

Please specify the budget period (e.g., January 1, 2007 to December 31, 2007).

B. Expenses

Please itemize the following expenses. Be sure to include any additional items relevant to your particular project. Provide an expense total.

- Salaries and wages by individual position, specifying full- or part-time positions
- Payroll taxes
- Fringe benefits and related fees
- Consultant and professional fees (e.g., accounting, legal, etc.)
- Travel
- Equipment
- Supplies
- Printing and copying
- Telephone and fax
- Postage and delivery
- Mission share
- Project expenses by category (education, worship, etc.)
- Rent
- Utilities
- In-kind expenses
- ---

TOTAL EXPENSES

C. Income

Please include all confirmed and anticipated sources of revenue, and indicate their status. Provide an income total.

- Government grants and contracts
- Foundations
- Corporations
- Earned income (rents, fees, etc.)
- United Way, Combined Federal Campaign, or other federated campaigns
- Individual contributions & offerings
- Fundraising events and product sales
- Endowment fund income
- In-kind support
- Additional revenue
- ---

TOTAL INCOME

Grant Application Guidelines

General

1. The Foundation reserves the right to reject in whole or in part any grant application that it deems to be incomplete or not in accord with its policies.
2. The decision of the Board of Directors of the Foundation regarding all awards shall be final.
3. Applications that are rejected may be resubmitted once they have been perfected to comply with the guidelines.

Purpose

1. Those seeking grants shall qualify for consideration by:
 - Being a United Methodist church or organization that is related to the Western Pennsylvania Annual Conference of The United Methodist Church
 - Seeking funding for activities that are in keeping with the mission and ministry purpose of the organization seeking the grant
 - Seeking funds for operating expenses necessary for the grant-related project
2. Priority for grant awards shall be given to:
 - Projects that are intended to enhance a ministry that is consistent with the United Methodist Foundation's mission to complement and reinforce the stewardship ministry of the churches, organizations, and programs of the Western Pennsylvania Annual Conference
 - Projects that are deemed to be of an outreach nature to the larger community
 - Projects that are collaborative with other United Methodist entities
 - Projects that have identified matching sources of revenue
 - Projects that are an integral part of a long-range plan for ministry in the community
3. Grants shall not be made for:
 - Direct salary support
 - Building repair, replacement, or expansion
 - Capital items
 - Cases in which the applicant has full funding available for the project or activity from another source (it is a positive to demonstrate contributions or matching funding)
 - Projects or activities that have no mechanism for evaluation in place
 - Cases for which there is no evidence of the governing body of the organization endorsing the project or activity

Grant Amounts and Terms

1. No grant shall be awarded to any one applicant in excess of \$5,000 for any calendar year.
2. Grants may include amounts to cover the internal expense of the Foundation staff assigned to provide fund development consultation with the entity seeking the funding.
3. Grants may be renewable for up to three consecutive years depending on funding sources and quality and scope of the project.
4. Grants may be made conditioned upon certain requirements being met and documented to the Foundation's satisfaction.
5. All grants awarded shall require no less than annual reporting to the Foundation as to the progress of the project and the financial activity resulting from the grant and the project funded.

Timing & Filing

1. Grant application packets are available on our Web site www.umfoundation.org.
2. Completed grant applications must be submitted in hard-copy in triplicate to the Foundation office by April 30th of each year.
3. Grant awards shall be made by May 31st of each year.

Grant Application Check Sheet

- One-page cover letter
 - Name of project
 - Purpose of project
 - Strategic reason for need for funding
 - Amount requested
 - Time period of project
 - Name, address, and phone number of contact person

- Copy of the current IRS determination letter indicating 501(c)(3) tax-exempt status (only required for non-parish institutions)

- Statement verifying payroll tax payments

- Organizational structure, including:
 - List of officers and directors, including relevant affiliations
 - Descriptions of key personnel involved in the project

- Finances, including:
 - Grant budget for project requested in grant application; refer to the *Grant Application Budget, Sections B and C*
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 - Current board-approved annual operating budget of the church or organization requesting grant, including expenses and income
 - Most recent audited annual financial statement

- Letters of support (optional) that substantiate need for the project and collaboration with other organizations

- Annual report, if available (Charge Conference format)

- Overview of any capital campaigns undertaken in the last five years

Mail 3 Copies of Completed Grant Application to:

**United Methodist Foundation of Western Pennsylvania
Attention: Grants Committee
223 Fourth Avenue, Suite 707
Pittsburgh, PA 15222**

**Applications must be received by
April 30th to be considered
in each applicable annual cycle.**