



## **GRANT INSTRUCTIONS**

**Please read these guidelines carefully, as they govern our grant-making process!**

### **GRANT-MAKING GUIDELINES**

Thank you for your interest in the Montpelier Area Foundation (Foundation). The following information will assist you in determining whether to apply to the Foundation for funding and explain how to proceed if you are eligible to do so. Please review these materials carefully. While the Foundation would like to support all the important work being carried out by Williams County's not-for-profit organizations, its financial resources are limited. The information provided through the application process helps the Foundation make sound decisions based on its mission, the directives of donors, and the Foundation's goal to provide effective assistance to as many organizations as possible.

### **POLICY STATEMENT FOR GRANT MAKING**

The mission of the Montpelier Area Foundation is to enhance the quality of life for all citizens of our area, now and for generations to come, by building community endowment, addressing needs through grant making, serving as a leader, catalyst, and a resource for charitable giving. Foundation grants are made for public charitable purposes that enrich the quality of life of citizens of Montpelier and the Williams County, Ohio area. Generally, grants are made (a) to help launch new projects which represent a unique and unduplicated opportunity for the community, (b) to support established organizations for special purposes, and (c) to generate matching funds.

### **WHO WE FUND**

The Foundation makes grants to tax-exempt 501(c)(3) organizations operating or proposing to operate programs primarily for the benefit of Williams County residents.

### **WHAT WE FUND**

The Foundation makes grants to increase the capacity of Williams County's not-for-profit organizations to respond effectively to the needs of the community. In general, the Foundation *prefers* funding for:

- **Start-up costs for new programs**
- **One-time projects or needs**
- **Capital needs beyond an applicant's capabilities and means**

## WHAT WE DO NOT FUND

The Foundation will *not* normally consider grants from unrestricted funds for the following purposes:

- Individuals other than scholarships (separate applications exist for the scholarship program)
- Programs that are strictly religious or sectarian in purpose
- Make-up of operating deficits, post-event or after-the-fact situations
- Endowment campaigns
- For any propaganda, political or otherwise, attempting to influence legislation or intervene in any political affairs or campaigns.

In addition, the Foundation board is *reluctant* to approve grants to any organization for the purpose of maintaining an on-going operating budget or for multi-year grant requests. (Please contact the Foundation office before submitting a multi-year grant request). However, exceptions to this may be made at the discretion of the Board.

## HOW TO APPLY

Completed *typewritten* application forms should be delivered to the Foundation's office at 110 S. Walnut Street, Bryan, OH 43506. The Foundation's mailing address is PO Box 651, Bryan, OH 43506. Applications cannot be submitted online.

***Applications that do not contain all the requested information may not be considered.*** If the information requested is not available, an explanation is required. To facilitate the preparation of complete grant applications, applicants are encouraged to utilize Foundation staff assistance. Contact the Foundation office at (419) 633-1156 if you have any questions or need assistance with your application.

In addition, Foundation board members may contact you to arrange a conference to discuss the application, your organization, or your request. This may be in the form of a site visit, telephone conversation, or a meeting. All proposals will be reviewed by Foundation staff for completeness and to assure that they fit within the Foundation's general guidelines. Please submit a grant application well in advance of the deadline. If, upon review, the application is considered incomplete for any reason, the application will not meet the submission requirements until the application is considered complete by the Foundation.

Once a grant is received, the Foundation anticipates that the funds shall be expended within 12 months of being awarded. **Failure to use funds for the purpose designated will result in obligation to repay grant money.** If it appears implementation of the project or program will be delayed, the grant recipient must submit a written explanation that contains a request to encumber the funds for the following calendar/fiscal year. The Foundation's Board of Trustees will determine if the funds may be held over or if the applicant must reapply in a subsequent grant cycle.

## **PROPOSALS SHALL INCLUDE**

- **Requested Signatures**
- **A copy of IRS determination letter showing 501 (c) (3) tax exempt status**
- **Most recent annual financial statement (preferably audited) or most recent 990 submission**
- **Organizations current annual operating budget detailing income and expenses**
- **Most recent annual report, if available**
- **Purchase estimates and/or project bids, if applicable**

## **WHEN TO APPLY**

The Foundation Board considers grants four times each year – in December, March, June, and September. Completed applications must be received at the Foundation office by **12:00 PM (NOON)** on:

<b>September 30</b>	<b>for consideration in December</b>
<b>December 31</b>	<b>for consideration in March</b>
<b>March 31</b>	<b>for consideration in June</b>
<b>June 30</b>	<b>for consideration in September</b>

If the deadline date falls on a weekend or holiday, the deadline for applications will be the first workday PRIOR to the deadline (e.g. Friday, if the deadline falls on a weekend).

**The Montpelier Area Foundation reserves the right to revoke any grant if the implemented project does not comply with our guidelines or fails to reflect the application that was submitted.**