

Annapolis Evangelical Lutheran Church Endowment Fund

2019 Endowment Fund Application

Overview

The Annapolis Evangelical Lutheran Church Endowment Fund was established in 2011 with periodic contributions from parishioners in varying amount since that time. To date, more than \$115,000 has been contributed and is under careful investment.

The Endowment Fund intends to provide funds to 501c(3) tax-exempt organizations that promote the missions of the Church in accordance with the Disbursement Protocols approved by the Board of Directors in April 2013 and reaffirmed in 2016. Requests may also be made on behalf of the Church as well. A copy of the Protocol is attached for reference.

Grants are distributed once a year. The EF Board reviews all grant proposals carefully. Applications must be **received on or before March 1 of the current year**. There is no maximum award but the annual amount available for distribution cannot exceed 5% of the fund in any one year.

Timetable* (Deadline: March 1)

- March 1 – June 30 Board of Directors approves grants
- July 1 All grantees notified by mail and checks mailed

* Timetable represents the maximum amount of time needed to complete the review process

Your Application Must Include:

- ◆ Application Form available on Church website
- ◆ Typed Proposal (Send an email to twmullenix@yahoo.com to request an electronic copy of the application in Word format.)
- ◆ Attachments, if any

How to Prepare Your Grant Proposal (no more than three typed pages in length)

- ◆ An overview of the organization or background on the individual applying for the grant
- ◆ An explanation of why funds are needed
- ◆ A description of how the money will be spent
- ◆ The objectives of the program in measurable terms—What benefit do you hope to accomplish as a result of this grant?
- ◆ A timetable for the project and for the receipt of the requested funds (All funds must be expended within one year of receipt unless otherwise stated)

- ◆ A description of staff involved and qualifications of individuals involved in carrying out projects
- ◆ Describe how you will evaluate the results of this program and the impact of this grant.
- ◆ Describe how contribution will be recognized

Attachments

- ◆ A budget for your organization with a financial breakdown of income and expenditures. An official audit, if available, is acceptable
- ◆ A list of your organization's board of directors and their affiliation/occupation in the community *Not required for individuals seeking grants
- ◆ Proof of your organization's tax exempt status (if any)

PLEASE SUBMIT SEVEN COPIES OF YOUR APPLICATION AND ATTACHMENTS

GRANTEES ARE REQUIRED TO SUBMIT A FULL ACCOUNTING FOR HOW THE GRANT WAS EXPENDED ALONG WITH PROGRESS REPORT WITHIN 12 MONTHS

Endowment Fund Application Form

Project Information (please complete and return with your typed proposal and attachments)

THIS SHOULD BE THE FIRST PAGE OF YOUR COMPLETED APPLICATION

Contact Person: _____

Address: _____

Telephone Number: _____ **E-mail Address:** _____

Project Director: _____

Project Title: _____

Brief Description of Request: _____

Name of 501(c)(3) non-profit organization to which check should be written (write "none" if a 501(c)(3) will not be designated):

If a 501(c)(3) organization is not available, list the person to whom the check should be written (this person will receive IRS form 1099-MISC and will be responsible for any income taxes):

Name: _____

Amount of Request: \$ _____

Total Cost of Project: \$ _____

Have you received a grant from the Endowment Fund before? Yes No

Other Commitments Received: _____

Other Proposals Pending: _____

I hereby certify that the information continued in this application is truthful. I understand that if a 501(c)(3) organization is not provided that I am responsible for the payment of taxes on the funds I receive under the guidelines of the Internal Revenue Service. I understand that the Endowment Fund Board strongly prefers that a 501(c)(3) organization be designated.

Signature: _____ **Date:** _____

Protocol for the Disbursement of Funds

Annapolis Evangelical Lutheran Church Endowment Fund

1. The Board will determine the limits on the total amount of funds available in any year, not later than March 1. Disbursements shall be made by July 1 upon written applications received by April 1. In special circumstances, the Board may make disbursements after July 1 so long as funds are available which have not been disbursed as of July 1.
2. The Board will accept only written requests from:
 - a. an eligible organization
 - b. the Senior Pastor
 - c. Committees or Boards of Annapolis Evangelical Lutheran Church (“the Church”)

Requests from individuals will not be accepted unless sponsored by one of the groups/individuals listed in a through c.

3. Eligible organizations shall include all social, service, religious, or quasi-governmental groups who are registered with the IRS as a charitable organization or who can certify that they are exempt from taxes due to government affiliation.
4. Disbursements will be in the form of a check. Under no circumstances will cash be disbursed.
5. Projects/programs shall be evaluated using the following guidelines.
 - a. Projects/programs should have a long-term and lasting impact on the recipient, the Church’s mission and ministry, and the community at large.
 - b. Capital projects should emphasize permanent construction, major life safety code renovation, or major system replacement or acquisition. Routine maintenance items such as painting, repair, cleaning, refurbishment or beautification, or other items normally in the operating budget of the Church should not be considered.
 - c. Social services programs should emphasize the development of individual or group life skills, job training and education, or provide services, which would allow the individual to obtain those services, by providing support during the training period. The Fund should avoid funding emergency services to individuals such as food, clothing, and shelter that is temporary, but can consider funding organizations that provide such services.
 - d. The fund should avoid disbursements to reduce debt, payoff loans and provide down payments to qualify for loans. The Fund should not make mortgage payments for either individuals or groups. The Board may consider such payments if foreclosure is imminent, or if such payment would contribute directly to another approved purpose.
 - e. The project or program should benefit more rather than fewer people, or said another way, provide the greatest good to the greatest number.
 - f. This protocol will be reviewed annually for content and revisions as necessary.

THE BOARD RESERVES THE RIGHT TO MODIFY OR WAIVE THESE GUIDELINES IN THE CASE OF COMPELLING NEED OR EXTRAORDINARY CIRCUMSTANCES WHEN PROPERLY DOCUMENTED.

Adopted April 11, 2013 (Updated and Approved, December 6, 2016)