

**Marion Gardner Jackson  
Charitable Trust**

Bank of America, Trustee

**Proposal Guidelines**

Deadline: July 31st  
For grants beginning January 1st

# MARION GARDNER JACKSON CHARITABLE TRUST

Bank of America, Trustee

## **BACKGROUND**

The Marion Gardner Jackson Charitable Trust was established by Marion Gardner Jackson, the granddaughter of local industrialist Robert W. Gardner, founder of the Gardner-Denver Company. Before her death in 1976, Mrs. Jackson set up a perpetual trust to aid religious, charitable, scientific, literary and educational organizations in the Quincy, Illinois area. Approximately \$10.8 million has been distributed to charitable agencies serving the Adams County area since the first grant was awarded in 1978.

## **PROGRAM OVERVIEW**

The Marion Gardner Jackson Charitable Trust, with Bank of America as Trustee, awards grants on an annual basis to aid religious, charitable, scientific, literary and educational organizations in the Quincy, Illinois area. The Trust will consider applications from not-for-profit organizations that provide services for residents of Quincy, Illinois and the surrounding communities in Adams County. No grants will be made to individuals.

The Fund will make grants in two categories:

**Capital Grants** – Applicants may apply for grants for one to five years to support capital projects that support the mission of the organization and/or the stated outcome of a program or project.

**Program/Operating Support Grants** – Applicants with organizational budgets of \$1 million or less may apply for grants of up to \$25,000 per year for up to 3 years for program or general operating support. For program support grants, the yearly request may not be more than 50% of the program's budget

Organizations may submit only one application per year to only one of the two categories. Organizations may not have more than one award from the Trust in any given year. Those receiving a multi-year award from the Trust that continues into the next grant year are not eligible to apply for an additional grant until the end of the grant cycle.

As a condition for accepting grant monies, grantees must provide annual programmatic and financial reports detailing the use of the funds and documenting the progress of the capital campaign/capital project or documenting the impact achieved by their use. Receipt of second through fifth year funding for multi-year grants will be dependent on the submission of the annual financial and project/programmatic reports. Report outlines will be provided with award letters. These reports must be received no later than December 15th.

Applicants will receive a formal notification from the Trustee during the first two weeks of January.

## **APPLICATION PROCESS**

Applications need to conform to the following guidelines.

### **Capital Grants**

To apply for a capital grant, applicants should complete all four sections of the application:

- I. Face Sheet
- II. Organizational Background
- III. Project Narrative
- IV. Required Attachments

#### **I. Face Sheet**

- a. Using the form provided, complete the application face sheet. *All completed applications are required to have two signatures on the face sheet.*

#### **II. Organizational Background**

- a. Provide general background information on the organization, its mission and range of services, and major accomplishments. Include a statement detailing the Board of Director's involvement with the organization.
- b. Provide descriptions of all programs offered by the organization, including descriptions of populations served and numbers of individuals served by each program.
- c. Briefly describe the organization's management structure and process.
- d. Briefly describe any funding received from the Jackson Charitable Trust in the last five years. If the project(s) has not been completed, please explain why.

#### **III. Project Narrative**

- a. Describe the project, its purpose and its relationship to the organization's other activities.
- b. Provide a detailed project budget and information on the fundraising strategies intended to meet the budget. The description of fundraising strategies should include information on other public and private sources that will be approached, as well as amounts requested. If the project will increase annual operating costs of the organization, include a description of how the organization will support these increased costs on an annual basis. Attach three bids for the capital project or any significant purchases of equipment. If you are unable to obtain three bids, please attach an explanation with the bids submitted.
- c. List all other funds raised and pending for the project. List the source of funds and the amount received or requested.

#### **IV. Required Attachments**

- a. Copy of the organization's current **IRS Determination Letter** confirming the organization's 501(c)3 and non-private foundation status. For organizations that have not received their Federal 501(c)(3) status, a fiscal agent may be used. In these cases a letter confirming the agreement from the fiscal agent and a copy of their Federal 501(c)(3) letter must be included in the proposal. The letter should outline their role and any administrative fees as a result of this agreement.
- b. Copy of the organization's current list of Board of Directors.
- c. Copy of the most recent audited financial statement.<sup>1</sup>
- d. Copy of the current fiscal year's budget and next year's projected budget.<sup>2</sup>
- e. List of organization's major funders for the current fiscal year.

Applicants should submit **two copies** of the completed sections I, II and III and only one

copy of section IV (required attachments). The narrative sections (II. organizational background and II. project narrative) of the application must not exceed **ten double-spaced pages using a 12-point font**. Concise applications are encouraged.

### **Program/Operating Support Grants**

In the best interest of the Quincy area community, the Marion Gardner Jackson Charitable Trust understands that support of programs and general operations budget items is necessary for the accomplishment of programmatic and organizational outcomes. Applicants with organizational budgets of \$1 million or less may apply for grants of up to \$25,000 per year, up to 3 years, for program or general operating support. For program support grants, the yearly request may not be more than 50% of the program's budget. To apply for a program/operating support grant, applicants should complete all three sections of the application:

- I. Face Sheet
- II. Program Narrative
- III. Required Attachments

#### **I. Face Sheet**

- a. Using the form provided, complete the application face sheet. *All completed applications are required to have two signatures on the face sheet.*

#### **II. Program Narrative (maximum of 10 pages for a through g)**

- a. Provide a brief summary of your organization's history, mission and experience.
- b. Describe the community and the need(s) that the proposed program will address. Identify what sources you used to determine those needs.
- c. State and discuss the outcome measures for the target population(s). Attach a program logic model.
- d. Describe the program activities and timeline for these activities to achieve the stated outcomes. Include the estimated number of people to be served.
- e. Outline the qualifications of the individual(s) who will actually provide the proposed services. Attach resume(s) of existing personnel and job descriptions for positions to be hired.
- f. Discuss your strategies for implementing your evaluation plan and describe how you will measure the effectiveness of this program.
- g. Discuss your plans for sustaining this program when Marion Gardner Jackson Trust funding has ended.
- h. Using the budget forms provided, for each year you are requesting support, indicate the funds required to operate the program and how those funds will be used. *The budget pages are not part of the 10 page limit.*

#### **III. Required Attachments**

- a. Copy of the organization's current **IRS Determination Letter** confirming the organization's 501(c)3 and non-private foundation status. For organizations that have not received their Federal 501(c)(3) status, a fiscal agent may be used. In these cases a letter confirming the agreement from the fiscal agent and a copy of their Federal 501(c)(3) letter must be included in the proposal. The letter should outline their role and any administrative fees as a result of this agreement.

- b. Letter from executive director confirming that the organization and staff are appropriately licensed or certified to conduct the proposed programs or services and that the organizations is operating within the rules and regulations of the system(s) it is part of.
- c. Copy of the organization's current list of Board of Directors.
- d. Copy of the most recent audited financial statement. <sup>1</sup>
- e. Copy of the current fiscal year's budget and next year's projected budget.<sup>2</sup>
- f. List of organization's major funders for the current fiscal year.

Applicants should submit **two copies** of the completed sections I and II and only one copy of section III (required attachments). The program narrative section of the application must not exceed **ten double-spaced pages using a 12-point font**. Concise applications are encouraged.

**APPLICATION DUE DATE**

All completed applications must be **received by 5:00 p.m. EST on July 31st**. If July 31<sup>st</sup> falls on a weekend, then applications must be received by 5:00 p.m. EST on the last business day of the month preceding July 31<sup>st</sup>.. Applications should be mailed or delivered to:

Debra L. Grand  
 Senior Vice President  
 Bank of America  
 231 S. LaSalle Street  
 Suite 0340  
 Chicago, IL 60697  
 Phone 312-828-2055

Applications will be acknowledged in writing by the Trust within one month of receipt. Applications that do not conform to the guidelines or are received after the deadline will not be considered.

**SITE VISITS**

A site visit may be requested by the Trustee. A site visit is not required for funding.

**TECHNICAL ASSISTANCE**

Additional copies of these guidelines may be obtained at:

- [www.bankofamerica.com/grantmaking](http://www.bankofamerica.com/grantmaking) (coming in the fall of 2009)
- the United Way of Adams County, 217-222-5020 or [www.unitedwayadamsco.org](http://www.unitedwayadamsco.org)
- the Community Foundation of the Quincy Area, 217-222-1237 or [www.mycommunityfoundation.org](http://www.mycommunityfoundation.org).

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<sup>1</sup> If the audited financial statement for the most recently-ended fiscal year is not yet available, please provide us with the unaudited figures, as well as the audit for the most recent year available. If the organization does not conduct an annual audit of its finances, please provide us with the unaudited financial statements as well as a cover letter from the organization's Treasurer, stating that the organization does not audit its financial statements and why (e.g., annual revenues and expenses under \$100,000).

<sup>2</sup> If the organization is within the first nine months of its current fiscal year, please provide only the current year's budget.

- or via e-mail by contacting [debra.l.grand@bankofamerica.com](mailto:debra.l.grand@bankofamerica.com)

If you have any questions regarding the materials to be submitted or need technical assistance, please contact:

Debra Grand

Bank of America

Tel: 312-828-2055

**Email:** [debra.l.grand@bankofamerica.com](mailto:debra.l.grand@bankofamerica.com)

## Marion Gardner Jackson Charitable Trust - Face Sheet

<b>Agency Name:</b>	
<b>Agency Mission:</b>	

Chief Executive Officer	
Name:	
Title:	
Address:	
Telephone:	
Fax:	
Email:	

Main Contact	
Name:	
Title:	
Address:	
Telephone:	
Fax:	
Email:	

<b>Type of Request (Circle One) :</b>	<input type="radio"/> Capital <input type="radio"/> Program/ Operating Support	<b>Request:</b> <i>(Year 4 &amp; 5 for Capital Requests Only)</i>	Year 1: \$ Year 2: \$ Year 3: \$ Year 4: \$ Year 5: \$
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Brief Description of Capital Project or Program for which you are requesting support:

Agency Budget Information for Current Fiscal Year	\$	%
Total Agency Budget:		100%
Total Revenue <i>(include realized and projected sources of support)</i>		100%
Amount from United Way:		
Amount from government grants:		
Amount from government reimbursements:		
Amount from non-government grants <i>(corporations, foundations)</i> :		
Amount from fee for services:		
Amount from local fundraising, special events and contributions:		

*I certify that all required materials are included and that this application is in compliance with the Marion Gardner Jackson Charitable Trust application requirements.*

\_\_\_\_\_  
Chief Executive Officer *(Typed)*

\_\_\_\_\_  
Chief Volunteer Officer – Board Chair *(Typed)*

\_\_\_\_\_  
Chief Executive Officer *(Signature)*

\_\_\_\_\_  
Chief Volunteer Officer – Board Chair *(Signature)*

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

Marion Gardner Jackson Charitable Trust - Budget Form A  
Total Program Costs from All Sources

Please check one:  
 Year 1, 2009  
 Year 2, 2010  
 Year 3, 2011

Position Title	Annual Salary	FTE	Total Project Costs	Other Funding Sources	Amount Requested from Gardner
1.					
2.					
3.					
4.					
5.					
<i>Subtotal (salaries):</i>		\$	\$	\$	\$
Payroll Taxes (   %)					
Fringe Benefits (   %)					
<i>Subtotal (benefits):</i>		\$	\$	\$	\$

Total Employee Compensation  
(salaries + benefits):

\$	\$	\$
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**Non-Employee Compensation**

Total Non-Employee Compensation

\$	\$	\$
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**Operating Expenses**

Item	Total Project Costs	Other Funding Sources	Amount Requested from Gardner
Office Supplies			
Equipment			
Copying and Printing			
Telephone and Fax			
Postage and Delivery			
Rent			
Insurance			
Utilities			
Maintenance			
Program Advertising			
Staff Travel			
Training and Educational Supplies			
Staff Training			
Evaluation			
Other Expenses ( <i>list and explain on Budget Form B</i> )			
Total Operating Expenses:	\$	\$	\$

Total Direct Expenses ( <i>Total Employee Compensation + Total Non-Employee Compensation + Total Operating Expenses</i> ):	\$	\$	\$
Total Indirect Expense ( <i>may not exceed 20% of Direct Expenses</i> )	\$	\$	\$
<b>GRAND TOTAL</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

## BUDGET FORM B

### JUSTIFICATION OF PROGRAM EXPENSES REQUESTED FROM THE MARION GARDNER JACKSON CHARITABLE TRUST and IDENTIFICATION OF OTHER FUNDING SOURCES

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Please list and explain all project costs to be funded by the Gardner Jackson Trust. Include additional pages if necessary.

#### Employee Compensation:

<u>Position</u>	<u>Explanation</u>
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#### Non-Employee Compensation:

<u>Position</u>	<u>Explanation</u>
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#### Operating Expenses (including other expenses):

<u>Item</u>	<u>Explanation</u>
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#### Other Funding Sources:

List ALL other current and pending funding sources related to this project. Please include the amount funded or requested and identify all that are in-kind.

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<sup>1</sup> If the audited financial statement for the most recently-ended fiscal year is not yet available, please provide us with the unaudited figures, as well as the audit for the most recent year available. If the organization does not conduct an annual audit of its finances, please provide us with the unaudited financial statements as well as a cover letter from the organization's Treasurer, stating that the organization does not audit its financial statements and why (e.g., annual revenues and expenses under \$100,000).

<sup>2</sup> If the organization is within the first nine months of its current fiscal year, please provide only the current year's budget.