

English, Bonter, Mitchell Foundation Application Guidelines and Helpful Hints

This guide is intended to explain the essential information and exhibits needed to properly evaluate your request for funding. Please describe your request for funding and the anticipated impact on the population served as clearly and concisely as possible. Since the Distribution Committee receives many requests for worthy causes from throughout our community, a clearly articulated request that concisely demonstrates how your organization meets the objectives of the Foundation will help to ensure thorough consideration.

In order for us to consider your application complete, we require completion of the following two separate request sections:

1. Funding Request Document (for electronic submission)

This document package is available on our web site at www.EnglishBonterMitchell.org as an Adobe pdf form (a current version of the free [Adobe Reader](#) software is required to fill out and save this form), and consists of:

- This guideline page
- Executive Summary
- Exhibits A through E
- Checklist and instructions for submitting your Funding Request electronically.

These forms should be completed in their entirety and submitted to the English, Bonter, Mitchell Foundation via email as a file attachment (see instructions on last page).

2. Supporting Documents and Exhibits

This portion of the application consists of:

- Those required additional documents and exhibits described in the Application Package Checklist page.
- An original signed Applicant's Agreement (Exhibit E).

These supporting documents may be submitted in electronic form if available, with the exception of the signature page (Exhibit E), which must be a signed original. In order for your application to be considered complete, all these documents must be submitted. These supporting documents should be mailed to the address included below the same day you submit your completed Funding Request Document.

Please note that a failure to submit both portions of the application could cause your request for funding to be declined. When both pieces of your application are received we will evaluate them for completeness. After that you will receive an email or letter from us confirming receipt. Once you have your confirmation of receipt there is no need for you to contact the foundation to inquire about the status of your application. However if you do not receive confirmation of receipt within 15 business days of sending it, then please contact Margaret Sturm at 260-461-6218.

Materials to be submitted via email should be sent to: margaret.sturm@pnc.com
See final page for important information about submitting your forms electronically.

Mailed documents should be sent to:

PNC Institutional Investments
Attn: Margaret Sturm
110 West Berry Street, Suite 900
Fort Wayne, IN 46802

Submission deadlines are April 15th and September 15th.

EXECUTIVE SUMMARY PAGE

Request date *← Start here, then tab or click to next fields*

Organization name

Primary contact person

Street address

City, state zip

Telephone

Extension

Email address

Amount of request

Purpose of request

Organization mission

Clients served per year

Number of staff

(in full time equivalents)

Number of volunteers

TOTAL PROGRAM BUDGET AMOUNTS

Revenues

Program generated

Individual

Corporate

Foundations

Government Grants

Other

Total revenue

Expenditures

Programs

Administration

Fundraising

Other (total)

Total expenditure

PENDING REQUESTS

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PRIOR ENGLISH, BONTER, MITCHELL GRANTS AWARDED

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EXHIBIT A

Use this page to describe your organization. Include information about the population and communities served, the nature of services provided and the impact on the community.
(Please do not use more space than this page allows.)

EXHIBIT B

Explain the program or project for which you seek funding, its purpose and objective, and the amount of request.

(Please do not use more space than this page allows.)

EXHIBIT C

FINANCIAL HISTORY

For the budget year starting _____ and ending _____

STATEMENT OF SUPPORT & EXPENSES

Revenues

Contributions
Individual
Corporate
Foundations
Government grants
Program generated
Other (please specify):
•
•

Total Revenue

Expenditures

Programs
Administration
Fundraising
Other (please specify):
•
•

Total Expenditure

BALANCE SHEET

Assets

Cash
Securities
Property/Equipment
Other (please specify)
•
•
•

Total Assets

Liabilities

Current
Long Term

Total Liabilities

Fund Balances

Restricted
Unrestricted

Total Fund Balance

**Liabilities & Fund
Balances Total**

EXHIBIT D

BOARD OF DIRECTORS

<u>Name</u>	<u>Additional Information</u>
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EXHIBIT E

APPLICANT'S AGREEMENT

Applicant understands that recipients of grants are required to submit periodic written reports regarding funded projects and hereby agrees to submission of same in the event funding is approved. Submission of requested written reports shall be made by Applicant to the Foundation within twelve (12) months of the date of the grant. In the event that a report satisfactory to the trustee is not submitted, Applicant agrees that it will return grant monies it has received from the English, Bonter, Mitchell Foundation.

Applicant

Name of Applicant

Signature of Officer
(see note below)

Name of Officer Printed

Date

Note

We must have the signature of an authorized officer of the organization making this request. In the case of an electronic request submission (see the next page), print out this page, then sign and mail it with any other required supporting documents.

APPLICATION PACKAGE CHECKLIST

We have submitted the following documentation as part of this grant application package:

- Grant application summary (Executive Summary)
- Description of your organization (Exhibit A)
- Summary of program/project, purpose and objective, and amount of request (Exhibit B)
- Final History (Exhibit C)
- List of Board of Directors (Exhibit D)
- Applicant's Agreement (Exhibit E)

The following Supporting Documents and Exhibits are also required to complete the grant application package. They may be separately submitted via email or mailed:

- Internal Revenue Service Letter of Determination showing 501C(3) status
- Most recent fiscal year-end Annual Report, Audited Financial Statement and Operating Budget
- Signed Applicant's Agreement

How to Submit Your Funding Request

After filling out this Funding Request on-screen, save it to your computer's hard drive. Then **email** the completely filled out document to margaret.sturm@pnc.com as a file attachment.

The required Supporting Documents and Exhibits (see list above), including the signature page, should then be **mailed** to:

PNC
Institutional Investments
Attn: Margaret A. Sturm
110 West Berry Street, Suite 900
Fort Wayne, IN 46802
or emailed to margaret.sturm@pnc.com

Submission deadlines are April 15th and September 15th.