

## **The Msgr. Henry V. Petter Endowment Fund at The Catholic Foundation**

### **Grant Application Process as of November 2015**

The Msgr. Henry V. Petter Endowment Fund at The Catholic Foundation (“The Endowment Fund”) was established by members of The St. Elizabeth Ann Seton Catholic Community, Plano, Texas, and has since expanded to an Interfaith led foundation to honor Monsignor Henry V. Petter’s leadership in the work of peace and social justice in the community.

#### **Purpose:**

To create and support societal structures that advance peace and social justice in our community; and

To educate, train and support individuals and families, thus providing them with the means necessary and suitable for the proper development and sustenance of life---namely, food, clothing, shelter, medical care, education and necessary social services.

Funding can be made available for general operations, to support new or existing operations, or to fund a specific project. The impact of the funding should ultimately help the organization grow capacity.

#### **Grant Application Process:**

Applications need to be submitted from January 1 through June 30.

Grants will only be given to qualified 501(c)(3) charities.

Grants may be given to groups, individuals, or organizations that demonstrate or promote social and economic justice consistent with the stated purpose.

Grant recipients will be required to submit a written report upon completion of their activities.

Grant applicants cannot submit additional requests until three (3) years have passed from the date of their last award.

Grants are to provide funding assistance in the North Texas geographical area.

Grants are awarded by final decision of The Advisory Board of Trustees.

**Grant applicants selected by the Distribution Committee will be contacted to arrange a site visit prior to the Board’s review and approval of any award.**

## Grant Application Checklist

(To be completed and returned with Grant Application and Attachments. Applications may be submitted electronically. Email to: info@PetterEndowmentFund.com)

### I. **Proposal Summary:**

- General Information
- Total Cost of Need and Amount Requested
- Signature

### II. **Narrative: (2-page maximum)**

- Background of your organization
- Funding Request (be specific)
- Budget for the Need (include bids or proposals if applicable)
- Sources of income for the request
- Evaluation- Expected Outcome

### III. **Attachments:**

- Most recent Financial Statement, including Balance Sheet and Income Statement  
(If audited or reviewed financial statements prepared by outside accountants are Available, please attach.)
- Current year operating budget with revenue and expenses
- List of Board of Directors
- Copy of most recent IRS letter indicating tax exempt status
- Major Expenditure/Construction/Renovation Projects . If applicable: (2) competitive bids for purchase of any equipment

# Msgr. Henry V. Petter Endowment Grant Application

## I. Proposal Summary:

### General Information

- A. Name of organization \_\_\_\_\_
- B. Address (Street, City, State, ZIP) \_\_\_\_\_
- C. Telephone with Area Code \_\_\_\_\_
- D. Name and Title of Contact Person \_\_\_\_\_
- E. Email address \_\_\_\_\_

Briefly explain why you are requesting this grant, what outcomes you hope to achieve and how you will spend the funds if the grant is made.

Names, titles, phone numbers and email addresses of individuals who will direct the funds:

\_\_\_\_\_

Number of paid full-time staff: \_\_\_\_\_ Number of volunteers: \_\_\_\_\_

### Total Cost of Need and Amount Requested

Number of additional staff required for this need (if any): \_\_\_\_\_

Total cost of project: \$ \_\_\_\_\_ Amount requested in this grant: \$ \_\_\_\_\_

Anticipated start date : \_\_\_\_\_ Anticipated completion date: \_\_\_\_\_

### Signature

My signature verifies that the entity applying for this grant currently has a tax exemption under the Internal Revenue Code 501(c)(3) and is not classified as a "private foundation" as defined under Code Section 509(a). My signature is made as one who is authorized to do so on behalf of the applied organization.

\_\_\_\_\_  
Director

\_\_\_\_\_  
President of Organization

Date: \_\_\_\_\_

Date: \_\_\_\_\_

## II. NARRATIVE (2 page maximum)

### A. **Background** – Describe the work of your organization, addressing the following:

1. Brief description including: history, mission and targeted service group.
2. Accomplishments and achievements (past and present).
3. Any relationships your organization has with other organizations that work to meet the same needs or similar services. Explain how you differ from these other agencies.

### B. **Funding Request** – Describe the program (project) for which you seek funding for, including how your mission impacts those in the community:

1. State the primary purpose and the need or problem you are seeking to address and how it helps fulfill your mission.
2. The population you are planning to serve and how they will benefit. (Be specific on numbers)
3. Are other organizations able to assist you in the implementation, and if so, how?
4. Will you require future funds; and, if so, how will these be obtained?
5. Is the grant request one of the top three needs of your organization?
6. Is the grant request part of a written strategic or capital plan? Describe.

### C. **Budget for the Grant**– Identify the specific uses of the requested grant (i.e. materials, capital construction, salaries, etc.)

### D. **Sources of Income** – Identify the sources of income for the need, actual and prospective amounts. Identify money received vs. pledged.

### E. **Evaluation – Expected Outcomes** – Explain how you will measure the effectiveness of your activities. Describe your criteria for success and the results you expect to have achieved by the end of the funding period.

## III. Attachments

### A. **Financial Information**

1. **Most Recent Financial Statement**, audited if available.
2. **Current Year Operating Budget**, with revenue and expenses. If grant request is included, show it as a sub-heading.

### B. **Other Supporting Materials**

1. List of Board of Directors (including addresses, phone numbers and email addresses)
2. Copy of your most recent IRS letter indicating tax-exempt status. If not available, please explain.
3. **Major Expenditure/Construction/Renovation Projects**- Please explain in detail if your grant request is for construction monies. Architect, Engineer and Consultant information must be provided. If for major purchases of furniture or equipment, attach bids

