



AMHERST GENERATIONS FOUNDATION GRANT APPLICATION GUIDELINES

We live in a region recognized world-wide for its natural beauty, heritage wonders, top ranked education and cultural assets, and most important, for the remarkable people who live here. It is because of these remarkable people caring and working together that life in this region is world-class and keeps getting better. Here at the Amherst Generations Foundation (Foundation), we support organizations and people working to make life better for those over 55, and for all of us.

The Foundation is proud of its grant application process which is innovative, streamlined, and easy to navigate. A component of successful Foundation grant applications should be helping those over 55 to live better lives, while also making this region a better place to live for everyone. The Foundation will favor grant applications that promise plausible, efficient, and measurable benefits to our target populations.

Grants range from \$1,000 to \$20,000 and the Foundation is quite flexible in the grants it will consider. For example, the Foundation will consider applications for direct service delivery initiatives, events, stop-gap emergency funding, and innovative solutions worthy of publication in traditional media and/or in scientific or trade journals.

While there are many types of proposals the Foundation will consider funding, the Foundation does not award grants: 1) for individuals, scholarships or fellowships; 2) for endowments of any kind; or 3) for housing or residential care communities. Only in extraordinary situations will the Foundation consider such awards.

We want to make it easy for people with brilliant ideas to ask for our help. If you have a unique and wonderful grant proposal that will make life better for 55+ and the community as a whole, but you are unsure if it is within the Foundation's scope, you may contact Foundation executive director Dal Giuliani directly by email at dal.giuliani@amherstseniors.org or you may phone the Amherst Senior Center and ask to be connected to him.

APPLICATION INSTRUCTIONS

We focus our time and resources providing direct serves to people, and we hope our grant recipients will too. In light of this focus on direct help to people, the Foundation's application process is brief and should take no more than three hours to complete. Often, less than one hour is enough.

This brief application is nearly always sufficient to assess applicants' request effectively and fully meet our fiduciary duty. In the event that we have follow-up questions after reviewing your application, we will contact you promptly and request that you respond promptly.



Since most applicants to our Foundation are in possession of routine tax and charity filings that they have made to state and federal agencies recently, we keep the process efficient by relying on these filings – filings that most applicants already have on the shelf. Applicants that do not make routine audited financial statement filings to state and federal agencies (i.e., 990s and NYS Charities filings) may be asked by our Foundation staff to submit supplemental information. These situations will be handled on a case by case basis.

AMHERST GENERATIONS FOUNDATION
GRANT FUNDING REQUEST FORM

DATE: _____

NAME OF REQUESTING ORGANIZATION _____

ADDRESS (CITY STATE ZIP) _____

CONTACT PERSON _____ EMAIL: _____

OFFICE PHONE _____ MOBILE PHONE _____

CORPORATE WEBSITE: _____

FEDERAL TAX ID #: _____ STATE CHARITIES ID# _____

REQUESTED AMOUNT: \$ _____

PAST FOUNDATION FUNDING

Have you ever requested funding from the Amherst Generations Foundation in the past?

_____ Yes _____ No

If Yes, when (month/year) _____ Amount of prior request _____



Briefly describe your prior request. _____

Was your prior request approved? _____ Yes _____ No

POLITICAL ACTIVITIES

Does your organization participate in or support political campaigns or party affiliated activities?

_____ Yes _____ No If yes, yellow highlight relevant political activity figures and description on the 990 and state charities filings that you will submit with this application.

FOUNDATION ACKNOWLEDGEMENT

If your request for Foundation funding is approved, how will the Foundation be acknowledged?

_____ Display of our Foundation's signage during activities we fund

_____ Foundation grant acknowledgement or write-up in your newsletter, brochures, at events, etc.

_____ Acknowledgement in any publications describing a Foundation funded initiative.

_____ Other Describe _____

PURPOSE OF FUNDING

Describe the purpose of your funding request in 300 words or less. Use a separate sheet of paper. Additional information about your project such as brochures, photos or other planning documents may be included in the appendix.

In addition to the maximum 300 word description requested immediately above, include the following information.



- 1) Quantitative estimate of impact (e.g., How many 55+ residents will benefit? How many non-55+ residents will benefit? Are there any benefits to the region as a whole not already quantified?)
- 2) Cost effectiveness comparison to similar initiatives locally or elsewhere (e.g., What is the total cost from all sources that will be used to serve each 55+ resident impacted by your proposal? How does this compare to industry and/or local norms? Any other efficiency comparisons/benchmarks?)
- 3) Quantify any other relevant benefits. (e.g., Is this a brand new type of innovative initiative? Is this a more efficient approach vs. similar existing initiatives? Is this a publication-worthy initiative? Etc.)
- 4) Qualitative description of impact (e.g., Describe how age 55+ residents will be better off with your program. Describe any incidental benefits to non-55+ residents as a result of your proposal. Etc.
- 5) Concise projected timeline for the following.
 - a. Project start date
 - b. Projected major milestone dates
 - c. Projected completion date
- 6) Concise one-page pro forma (i.e., pro forma = predicted) income/expense statement for the proposed initiative.
- 7) Clear explanation of any and all Foundation funds that would be used for any type of administration or overhead.

ADDITIONAL DOCUMENTS NEEDED

- 1) Your organization's most recent Federal 990 filing. If your organization does not prepare and submit annual Federal 990 filings, please explain why (briefly).
- 2) Your organization's most recent state charities filing. If your organization does not prepare and submit annual state charities filings, please explain why (briefly).
- 3) Your organization's mission statement.
- 4) Any directly relevant brochures or other public information that you have on hand related to: a) this request and/or b) the current or past work and history of your organization. We use this information to better understand your proposal and/or your broader scope of work.
- 5) List of your organization's current board members and their affiliations. Note: If the list of board members with their affiliations is already included in the Federal 990 you are submitting with this application (and if it is current) per 1) above, note in pen on your Federal form 990 that "the board list and affiliations in this 990 are current and complete.
- 6) Upon 6 months of receipt of grant money, submit a summary of results/metrics/anecdotal information to describe how the money was used and the outcome it produced.

If you are an organization or individual that does not have nonprofit status, please explain. Nonprofit status is NOT a strict requirement for Foundation funding eligibility. If absence of nonprofit status is an advantage in the design or impact of your proposal, be sure to explain the nature of this advantage.



Submit your completed Grant Funding Request Form and the Additional Documents Needed to Foundation Executive Director Dal Giuliani dal.giuliani@amherstseniors.org. If you have any questions, you may email the Executive director or phone the Amherst Senior Center and ask to be connected to him.

Thank you for making this wonderful region even better!