

# The Mutual Fund Store® Foundation

## 2010 Grant Guidelines

### Overview

Adam Bold, founder of The Mutual Fund Store®, believes philanthropy has the power to effect and achieve positive change. From this bedrock belief, he established The Mutual Fund Store® Foundation with the mission to help build and sustain healthy and thriving communities that advance self-reliance and productivity.

### Areas of Focus

The Foundation prefers to grant money to organizations providing opportunities that help individuals and families meet their basic needs.

### Preferences

In response to current economic conditions, preference will be given to organizations that provide direct services and programs to individuals and families in need.

### Grant Requirements and Restrictions

The Foundation will consider making grants to support programming 501(c)(3) public charities in the following counties:

- Cass
- Clay
- Jackson
- Platte
- Ray
- Johnson
- Wyandotte

The Foundation will **not** provide funding for:

- Individuals
- Special Events
- Capital Campaigns
- Religious organizations, unless they are engaged in a significant project that is nonsectarian and benefits a broad base in the community
- Political causes, candidates or legislative lobbying efforts
- Past operating deficits, travel or conferences

Due to the nature of our business, The Mutual Fund Store® Foundation is unable to provide financial products or in-kind services directly to individual organizations.

### Grant Range

The Mutual Fund Store® Foundation will consider grant requests that do not exceed \$5,000.

### **Timeline**

- February 5 Application available online
- April 16 Application deadline
- May 7 Applicants notified of finalist selections and site visits scheduled
- June 18 Grant award announcement made
- June 25 Grant funds awarded

### **Application Process**

- The Mutual Fund Store® Foundation Beneficiary Selection Committee will meet to review all applicants and make their recommendations for the qualifying finalists in the 2010 grant competition.
- Site visits will be scheduled to visit each finalist. The site-visit will be one-hour long and comprised of a short tour of the organization and a brief, casual discussion about the specific proposed program and the organization.
- From these on-site visits and the grant proposals, the Committee will select the beneficiaries for The Mutual Fund Store® Foundation's 2010 grants.

### **Application Information**

- Limit the grant application to 3 pages; do not use font smaller than 12-point.
- Submit two (2) copies of the completed application, by mail, to: Mindy Wilson, Director, The Mutual Fund Store Foundation, 7301 College Boulevard, Suite 220, Overland Park, KS 66210.
- Applicants will be notified of the Foundation's decision in writing.
- For questions regarding your grant application, contact Mindy Wilson at [mwilson@mutualfundstore.com](mailto:mwilson@mutualfundstore.com).

### **Application Check-List**

- Two (2) copies of each of the following:
  - Cover Sheet
  - Grant Application (no longer than 3 pages, using 12-point font or larger)
  - Board-Approved Operating Budget for fiscal year



## Application Cover Sheet

Applicant Organization:

Program Title:

Program Start Date:

Program End Date:

Grant Amount Requested:

Total Program Budget:

Grant summary, including brief description of program, the need addressed, and expected outcomes/benefits. Please limit to the space below.



## Grant Application

(please limit to 3 pages)

- A. Name and address of applying organization
- B. Application contact person, title, phone number and email
- C. Title of proposed program
- D. Description of program
  - 1. Describe specifically the activities of the program being proposed and its goals and objectives.
  - 2. What population will be served? How many will be served?
  - 3. How will this program be marketed to its target population?
  - 4. Who will be responsible for administering the program, both professional and volunteer? What are their qualifications?
  - 5. Is this a new program or an ongoing one? If it's ongoing, detail results and outcomes.
  - 6. Is it currently being implemented by another organization in the greater KC area? If yes, detail the results and explain how your program will not duplicate services.
- E. Describe the extent of the need for this program.
- F. How will the community ultimately benefit from the implementation of this program?
- G. Financial Information
  - 1. What is the dollar amount requested for this program? What is the total percentage of this amount to the total cost of the program?
  - 2. Please provide details on how this grant will be used.
  - 3. Attach a Board-Approved Operating Budget for the fiscal year.
  - 4. If this is intended to be an ongoing program, how does your organization plan to assume the costs in future years?
- H. Evaluation
  - 1. What are the expected short-term and long-term outcomes of this program?
  - 2. How will these outcomes be evaluated?

- I. Is there a possible Volunteering Opportunity for The Mutual Fund Store®? (Note: The Mutual Fund Store® Foundation recognizes that nonprofit organizations serve specific clients and populations and volunteering opportunities may be limited as a result.)
- We are interested in something that fits the following structure: a one-half day activity for a group of 40 – 60 people, comprised of The Mutual Fund Store® employees, their spouses and children, if possible.
  - An example from a past, successful volunteering opportunity: spending an afternoon at Harvesters sorting food and packing the BackSnacks for area school kids.