

Margaret Waldron Memorial Trust Fund Grant Application

The Fund was created by the late Margaret E. Waldron in 1976 to address the needs and opportunities of the Muncy area and to benefit selected nonprofit organizations of interest to Ms. Waldron during her life.

General Criteria for Reviewing Requests:

The grant review process is competitive—there are always more funding requests than there is available funding. The Margaret Waldron Memorial Trust Fund favors proposals that:

- Address priority community needs and/or opportunities in innovative ways that enhance the quality of life within the Muncy area.
- Show evidence of qualified leadership to complete project and responsibly administer grant funds.
- Clearly articulate a need/opportunity, demonstrate an effective focusing of human & financial resources, and hold potential for successfully impacting the identified need/opportunity.
- Demonstrate a stable funding base from other sources and/or the ability to achieve long-term self-sustainability, especially when seeking start-up or seed funding.
- Use volunteers and in-kind support to reduce and complement financial support.
- Demonstrate potential for Waldron trust funds to leverage funding from other sources and/or propose use of a Waldron grant/loan to attract matching funds.
- Does not duplicate other programs or projects serving the region.
- Stimulate cooperation and collaboration among agencies and/or between the public & private sectors where possible.

Limitations:

Generally **no grants** will be provided for:

- Nonprofit programs located outside of the Muncy area, unless a major function of the program or project is to serve the Muncy area
- Endowments (unless created within the First Community Foundation of Pennsylvania)
- Ongoing operational support (except for selected agencies designated by Margaret Waldron)
- Annual campaigns and event sponsorships (except for selected agencies designated by Margaret Waldron)
- Grants or loans to individuals
- Research grants of a highly technical or specialized nature

Funding Request Process:

- Applicants must be qualified to receive tax-exempt contributions as defined by the IRS—in the vast majority of cases, applicants will be 501(c)(3) organizations.
- Applicants without 501(c)(3) status may work through another qualified 501(c)(3) organization that is willing to serve as a Fiscal Sponsor for the applicants (Fiscal Sponsor form attached).
- All applicants must complete a Foundation Grant Application
- Applicants must submit **1 original and 3 copies** of the application and all required attachments.

Deadline and Response Process:

- Applications must be **postmarked no later than March 1** to be considered. No drop-offs or walk-ins will be accepted.
- Notification will be made 6-8 weeks following the deadline.
- The grant application can be found on our website at www.fcfpa.org.

Please return all completed applications to:

Williamsport-Lycoming Community Foundation
Attn: Program Officer
330 Pine Street, Suite 401
Williamsport, PA 17701

If you have any additional questions or concerns please call:

Betty Gilmour, Program Officer
Phone 570-321-1500 or 1-866-901-2372
E-mail bettyg@fcfpa.org

Margaret Waldron Memorial Trust Fund Grant Application
DATA INTAKE SHEET

Date: _____

Organization:

President/CEO/Executive Director:

Mailing Address:

City/State/Zip

Organization Phone: _____ **Fax:** _____

Email: _____ **Website:** _____

Contact Person

Name/Title: _____

Email: _____ **Phone:** _____

Program Name:

Amount Requested: _____

Program Description: (150 words or less. This section is **required**)

Margaret Waldron Memorial Trust Fund Grant Application
PROJECT BUDGET FORM

Organization: _____

Project/Program: _____ Date: _____

SECTION ONE – PROJECT INCOME

Check One

Funding Sources List each actual and/or anticipated source of funding for this project ONLY.	Amount	Funds Requested	Funds Committed
The Community Foundation Grant	Box 1		
Total Project Income	Box 2		

SECTION TWO – PROJECT EXPENSE

Expense Items List expenses for this project. On a separate page, provide a brief description of any items that are not self-explanatory.	Amount	Amount of item to be funded by Foundation grant
Total Project	\$	\$

Should match Box 2 Should match Box

Margaret Waldron Memorial Trust Fund Grant Application General Instructions

Checklist of attachments (Please include the Following with Application—if you are unable to provide any of these items, please state the reason why in your cover letter):

- _____ Description of any funding previously received from the Margaret Waldron Memorial Trust Fund or the Williamsport-Lycoming Community Foundation
- _____ List of Board of Directors and Professional Staff
- _____ Copy of most recent IRS 990 form (please do not include Schedule B of your 990), most recent financial statements, or most recent annual audit (If using fiscal sponsor, submit these materials for both fiscal sponsor & applicant as appropriate). Please be sure to include project budget attached.
- _____ Copy of your most recent **letter of determination from the IRS**, advising that your organization, or your fiscal sponsor's (see below), is exempt from taxes under Section 501(c)(3) of the IRS code, and that the organization is not a private foundation as defined in Section 509(2).
- _____ Current annual budget and, if requesting funds for a specific project, an itemized project budget.
- _____ List of current and anticipated sources of financial support, including the current status of any pending funding requests.
- _____ Cover Letter (not to exceed 3 pages) to include: Explanation of current need, problem or opportunity; brief description of activities, timeline(s), staff & volunteers involved, including cooperative efforts with other organizations; and why a Margaret Waldron Memorial Trust Fund Grant is needed.

Applicant certification: *To the best of my knowledge, statements in this application and all attachments are true and correct; the document has been duly authorized by the governing body of the applicant; the applicant agrees to report to the Foundation on the use of any grant/loaned funds received and on the progress of the project to be funded; and the applicant will comply with applicable laws, regulations, terms, and conditions in effect at the time of a grant/loan award. I further understand that the Margaret Waldron Memorial Trust Fund and the First Community Foundation of Pennsylvania, in evaluating this grant application, may review any information submitted as part of this request with advisors of the Foundation's choosing and will treat information submitted by applicant in a confidential manner.*

Name (printed or typed): _____
Title: _____

Signature: _____ Date: _____

To Be Completed by Fiscal Sponsor:

A Fiscal Sponsor is required if applicant is not a 501(c)(3) organization or other agency qualified to receive tax-deductible contributions as recognized by the Internal Revenue Service.

Fiscal Sponsor: _____ Tax ID #: _____

Contact Name: _____ Phone: _____

Address: _____

City: _____ State: _____ Zip: _____

Mission of Agency/Organization: _____

Relationship to Applicant: _____

Disclose fee being taken, if any (if none please indicate N/A) _____

My agency/organization is qualified to receive tax-deductible contributions and has agreed to assume responsibility and accountability as fiscal sponsor for the above named applicant.

Name (printed or typed): _____ Title: _____

Signature: _____ Date: _____