

United States Masters Swimming Endowment Fund Grants Program

The USMS Endowment Fund is the endowment fund established in 1998 by United States Masters Swimming that builds and maintains an endowment, the earnings of which are used for philanthropic purposes for the general benefit of Masters Swimmers and Masters Swimming. It serves as a funder, catalyst, neutral conveyor and repository for information with respect to Masters Swimming needs, issues and institutions.

The USMS Endowment Fund shares the common promise that the intentions of our donors will forever be translated into meaningful, charitable purposes. In view of the fact that there is no other charitable or philanthropic national institution addressing the matters of concern to Masters Swimmers, the USMS Endowment Fund is the right thing at the right time to address this need.

The USMS Endowment Fund serves Masters Swimming in many ways. Donor advised funds may benefit a broad range of programs involving Masters Swimming or Masters Swimmers, at the discretion of the donor.

The USMS Endowment Fund may benefit projects in many areas, with emphasis being in the following areas:

- Medical and Health Research focused on the benefits resulting from swimming fitness programs for adults.
- Development Assistance for new Masters Swim Teams and Local Masters Swim Committees.
- Outreach to other adult fitness organizations to help in the coordination of programs and facilities.
- Education--to improve leadership, address contemporary swimming and adult fitness issues and help Masters swimming programs with special needs.

GRANTMAKING POLICIES

1. Priority is given to programs and projects which expect to have a positive effect on USMS and its goals and objectives.
2. Grants are made to nonprofit organizations exempt from federal taxation under Section 501(c)(3) of the Internal Revenue Code.
3. Grants are generally given one time only for specific purposes and will not typically be awarded to provide annual operating expenses or support.
4. Grants are made with the understanding the USMS Endowment Fund has no obligation or commitment to provide any additional support to the grantee.
5. The USMS Endowment Fund operates without discrimination as to age, race, religion, sex, disability or national origin in the consideration of grant requests, and will award grants only to seekers which do not unlawfully discriminate as to age, race, religion, sex, disability or national origin.

WHAT YOU NEED TO KNOW BEFORE APPLYING FOR A GRANT

1. Grants are not made to individuals, except in the form of scholarships.
2. USMS Endowment Fund does not generally make grants to create or augment other organizational endowments.
3. The USMS Endowment Fund generally does not provide funding for projects, which are considered part of a regular school curriculum.
4. The USMS Endowment Fund does not generally support travel for educational or other purposes.
5. The USMS Endowment Fund does not provide grants in support of any political campaign, or to support attempts to influence legislation of any governmental body other than through making available the results of nonpartisan analysis, study and research.

GRANT SELECTION CRITERIA

In reviewing grant applications, the foundation gives careful consideration to:

1. the potential impact of the request and the number of people who will benefit;
2. an imaginative and creative approach;
3. the extent of volunteer involvement and support for the project;
4. the commitment and capacity of the requesting organization's leadership to carry out the program or project;
5. the degree to which the applicant works with or compliments the work of other organizations in an attempt to eliminate duplication of services and to encourage programs that enhance cooperation and collaboration among institutions within the general field of Masters Swimming;
6. the organization's fiscal responsibility and management qualifications;
7. the possibility of using the grant as seed money for matching funds from other sources;
8. the ability of the organization to obtain the necessary additional funding to implement the project; and,
9. The ability of the organization to provide ongoing funding after the term of the grant as expired.

2008 GRANT APPLICATION DEADLINE

June 1, 2008 for award following the 2008 USMS Convention.

Please submit applications by 4:00 p.m. EST to:

USMS Endowment Fund Board of Governors
P.O. Box 185
Londonderry, NH 03053-0185

Please do not hesitate to contact Douglas D. Church, Chairman of the Board of Governors of the USMS Endowment Fund (317 773-2190; fax 317 773 5320), endowment@usms.org, dchurch@cchalaw.com. We are here to help you in any way possible.

USMS Endowment Fund GRANT APPLICATION

This application may be reproduced if the format is followed precisely.

Name of Organization

Date

Street

Telephone

City

State

Zip

General objectives of the Organization:

For office use only:

Date received _____

Assigned to sub-committee _____

Does your organization have tax-exempt status under Section 501(c)(3) of the Internal Revenue Code?

Yes _____ No _____

Please explain the number of individuals served by the organization:

Amount requested: \$ _____ Total cost of proposed project: \$ _____

Date the funds from this grant would be needed: Date _____ Amount \$ _____

How long has the organization been functioning? _____

How long has the program for which you request funds been in existence? _____

Is this grant to supplement an established program? Yes _____ No _____

of full-time paid employees: _____ # of full-time paid employees: _____

Will this grant involve additional employees? Yes _____ No _____ How many? _____

Is the organization directly affiliated with United States Masters Swimming?:

Yes _____ No _____

United States Masters Swimming

Previous grant received from USMS :	Date	Amount
	_____	\$ _____
	_____	\$ _____
	_____	\$ _____
	_____	\$ _____

<u>Other funding for the proposed project</u>	<u>Potential or committed</u>	<u>Amount</u>
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Please list the organizations major sources of support and the percent of the total each provides.

<u>Funding Source</u>	<u>Percent of Total</u>
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(To be signed by the President of the governing body and by individual to whom future questions and correspondence may be addressed):

Print Name:	_____	Print Name:	_____
Signature:	_____	Signature:	_____
Title:	_____	Title:	_____
Phone:	_____	Phone:	_____

Project Description

Please answer the following questions using no more than two pages, single spaced, in twelve (12) point font, in the order listed. You are encouraged to be as specific as possible within the space allowed.

- Explain the project for which funds are requested and identify any not-for-profit partners with whom you will work to plan or implement the project;
- How did you become aware of, or identify the need for this project?
- How do you plan to evaluate the success of your project?
- What are your current thoughts on how this project might be sustained (if appropriate)?
- If USMS Endowment Fund does not approve your request for funds, what alternative plan would you probably follow:
- Is there anything else you would like for us to know about this project?

Attachments and Submission Instructions:

Submit One (1) master copy of your proposal including items 1-9 **in the order listed**.

Please submit fourteen (14) copies of items 1-6. Write or type the corresponding number in the upper right hand corner of each document. Faxed or electronically-mailed copies will not be accepted. **Proposals need only be bound by staple or binder clips.** If you would like to include supplemental information or attachments (number 9 from the list below) for review by the program officer, please feel free to include one copy of each attachment. Be advised that only items 1-6 will be seen by the Distributions Committee.

1. USMS Endowment Fund Proposal Cover Form (pages 1 and 2 of this package).
2. Project Description (should not exceed 2 pages, single spaced).
3. Detailed budget for the proposed project justifying the amount requested.
4. List of members of your governing body.
5. Most recent financial audit.
6. The organization's current year budget.
7. Copy of 501(c)(3) tax exemption ruling from Internal Revenue Service.
8. Prior income and expense statements for the project (except new projects).
9. Additional supporting documents (brochures, flyers, etc.)

Mail to: United States Masters Swimming Endowment Fund
P.O. Box 185
Londonderry, NH 03053-0185