

**Elizabeth Morse Genius Charitable Trust**  
**Frequently Asked Questions (FAQ's)**  
February 10, 2009

Proposal

**1) Is a letter of inquiry required to begin the process?**

Yes. Please review the guidelines for the requirements for a letter of inquiry.

**2) I'm not sure whether a particular program would be well received by the Trustees. Should I call the contact person?**

Re-read the five tenets of the Mission Statement and the requirements for a letter of inquiry. If your program satisfies at least one tenet, your organization is located in the Chicago Metropolitan area, and you can discuss your organization and program as requested in the guidelines, the Trustees will likely review your letter of inquiry. The Trust and its contacts do not like to pre-screen ideas. However, if questions remain after reviewing both the Mission Statement and the letter of inquiry requirements, please feel free to call with questions.

**3) I would like to meet with the Trustees to discuss options for a proposal. Who do I call?**

If desired by the Trustees after issuing an invitation for a proposal and the receipt of the proposal, the Trustees will initiate any in-person meetings. Please see above for assistance in determining whether a specific program would be welcomed by the Trustees.

**4) What is the range of grants made by the Trust?**

The Trust funds a wide range of grants. Our 990PF is publicly available for your reading. Preferable to the Trustees is for you to find a program, or portion thereof, which fits within the Trust guidelines. It is the experience of the Trustees that grant requests built around a particular project or aspect of a program are more persuasive than those built around a defined dollar amount. Thus, start with the program and the guideline categories then add the requisite dollar amount. Keep in mind that significant rationale must be provided for the Trust to be the primary or sole funder of any particular program.

**5) We have been declined from the Trust's sister Trust, Elizabeth Morse Charitable Trust. Can we submit a letter of inquiry with the Elizabeth Morse Genius Charitable Trust?**

No. It is the policy of both entities that once you have contact – whether simply a letter of inquiry, a full proposal, or as recipient of a grant – with one Trust, that your contact remain with that Trust.

- 6) Our organization was established and received our IRS Determination Letter within the last year. We have not filed a 990, nor do we have an audited financial statement. Are we eligible for a grant?**

If your organization fits one of the tenets of the Mission Statement and you can discuss all of the categories listed within the guidelines, explain why you are not including your 990 or audited financial statement. The Trust does not discriminate against new organizations. However, you must submit an IRS determination letter proving that you are a 501(c)(3) organization.

## Report

- 1) Our organization / program goals have changed from when we submitted our proposal. Is it ok to provide responses for our new goals in our report?**

No. The Trustees want to track your responses to the goals as stated in your proposal. If your goals have changed, please respond to the goals as presented. If changes were made in response to the goals as originally stated, you may explain that in your response.

- 2) Our budget has changed since we submitted our proposal. What should we do?**

Include a copy of your revised budget, including actual and expected for both revenue and expenses. Include a column for the funds received from the Elizabeth Morse Genius Charitable Trust so we can easily see where you expended the grant. If the change in the budget is dramatic, please explain why and what you have done for dramatic shortfall or surplus.

- 3) Is it ok to submit our general report that we send to all stakeholders at the end of each year?**

No. We expect a report on how you used the specific grant you received from the Elizabeth Morse Genius Charitable Trust. Your report should align with the proposal submitted, i.e. it should report on any particular program highlighted within the proposal, including outcomes relative to your stated goals.

- 4) We have a new development director who recently discovered that a report was not submitted for our last grant. We wish to submit a new letter of inquiry. What should we do?**

As stated in our Specific Guidelines and Procedures for Submitting a Full Proposal, we require a report on use of funds for a grant at least 90 days prior to submission of a new letter of inquiry. If you did not submit a report for a previous grant, do so now. Make sure it responds to the goals and program as stated in the funded proposal, including a budget, expected and actual, for the year of the grant. Then, wait 90 days before submitting a new letter of inquiry.