

# The Elizabeth Morse Genius Charitable Trust

## Grant Application Process

Effective December 1, 2008

### Mission Statement

- 1 The encouragement of the principles of individual self-reliance, self-sacrifice, thrift, industry, and humility.
- 2 The relief of human suffering: through scientific research and education regarding disease; assistance to youths with troubled childhoods and emotional disorders; the care of the elderly; and the succor of humankind during time of natural and human-made disasters.
- 3 The fostering of individual self worth and dignity, with a broad emphasis on the classical fine arts.
- 4 The development of physical health and spiritual well being through vigorous athletic activity.
- 5 The promotion of world peace and understanding through the improvement of national and international means of travel by air, rail, and sea.

### Letter of Inquiry Requirements

The Trust has a two-step process for applying for a grant.

A) First, The Trust requires a Letter of Inquiry that must:

- a) Be submitted in duplicate;
- b) Be no more than three pages; letters that exceed three pages will not be considered. Please note that if the Applicant elects to send a cover letter with the Letter of Inquiry, the number of pages in the cover letter will be counted in determining whether the Applicant has exceeded the foregoing maximum page requirement. ***Do not include any attachments when submitting the Letter of Inquiry;***
- c) Be written in font size no smaller than Times New Roman 12-point with standard, one-inch margins and double-spaced; and
- d) Cover each of the following categories:
  - i. A brief description of the Applicant, its mission, and history;
  - ii. A description of the project or purpose of the request;
  - iii. The grant amount requested; and
  - iv. How the grant, if made, will carry out the Mission of The Trust, as set forth on page 1, above.

The purpose of the Letter of Inquiry is to provide a brief and broad overview of the Applicant and the project or purpose of the request. If invited to submit a Full Proposal, the Applicant will have an opportunity to provide additional detail.

Applicants who have previously received a Grant from The Trust must, prior to submitting a Letter of Inquiry, timely submit a Report to The Trust on the prior Grant in accordance with its Grant Letter.

The Trust reviews Letters of Inquiry on an on-going basis. Review of a Letter of Inquiry under normal circumstances will occur sometime between one and four months after receipt.

Applicants who are *not* invited to submit a Full Proposal must wait at least 12 months before submitting another Letter of Inquiry.

- B) Second, based upon review of the Letter of Inquiry, The Trust will advise the Applicant whether to submit a Full Proposal.
- a) In the event that The Trust invites a Full Proposal, The Trust will advise the Applicant of additional application requirements, as set forth in “Specific Guidelines and Procedures for Submitting a Full Proposal to the Elizabeth Morse Genius Charitable Trust”, a copy of which will be included in the Request for Proposal; and
  - b) Please note that The Trust performs an initial review of a Full Proposal within two-three months of receipt. The initial review may raise additional questions for which The Trustees would require additional information or request a site visit. The full review process may take from up to six months to a year from date of receipt of the Full Proposal.
  - c) The Elizabeth Morse Genius Charitable Trust, as a rule, generally does not invite Full Proposals from Applicants who have previously applied for a Grant from its sister Trust, The Elizabeth Morse Charitable Trust.

### **Full Proposal Requirements**

- A) The Elizabeth Morse Genius Charitable Trust accepts Full Proposals for a Grant only after The Trustees have invited a Full Proposal from the Applicant by issuing a written Request for Proposal. The Trustees invite Full Proposals only after review and approval of a Letter of Inquiry previously submitted by the Applicant.
- B) In the event that The Trust invites a Full Proposal, The Trust will advise the Applicant of additional application requirements, as set forth in “Specific Guidelines and Procedures for Submitting a Full Proposal to the Elizabeth Morse Genius Charitable Trust”, a copy of which will be included in the Request for Proposal.

**Please do not put The Trust or the Trustees on any mailing or email lists to receive any items or requests to purchase tickets or tables at fundraising events.**

**The Trust generally does not fund**

- ◆ Individuals;
- ◆ Organizations outside the metropolitan Chicago city area;
- ◆ Capital Campaigns; or
- ◆ Endowment Campaigns.

**Meetings between The Trust and Applicant**

- ◆ Occur after a proposal has been submitted; and
- ◆ At the request of The Trust.

**The Trust will notify each Applicant:**

- ◆ If additional information is needed; and
- ◆ The decision regarding the Letter of Inquiry.

**Direct Letters of Inquiry in duplicate to:**

Elizabeth Morse Genius Charitable Trust  
C/o Kristin Carlson Vogen  
Bank of America  
IL1-231-13-32  
231 South LaSalle Street  
Chicago, IL 60697

Should you have any questions, please check this website for Frequently Asked Questions (FAQs) or contact Kristin Carlson Vogen at 312/828.1029.