



Trust Services Trusted Foundation Guidelines and Application

Evaluation Guidelines

- The requesting organization must qualify for tax exempt status under Section 501(C)3 of the Internal Revenue Code of 1954, for such purposes as constitutes public charitable purposes.
- The requesting organization's structure and management, including establishing of objectives, budget and board of directors and staff responsibilities
- Possible duplication of government or private sector efforts
- Whether, and how, the success or failure of the program can be effectively measured
- The programs' impact on the community

Limitations

Because we cannot fund every worthwhile endeavor, we direct our resources to those areas (focused mainly in Miami County, Kansas) where we feel the most critical needs exist and where our support can have the greatest impact. In general, the Foundation does **NOT** consider funding the following:

- Organizations and causes outside the Kansas City area and the eastern half of Kansas
- Organizations and programs designed to influence legislation or elect candidates to public office
- Agencies which are operating as chapters of a state or national organization
- Individuals
- Sectarian or religious organizations whose services are limited to members of any one religious group
- Tickets or tables for benefit purposes
- Advertising for benefit purposes
- Loans or investments

Recipient Accountability

It is the responsibility of the grant recipient to ensure that the grant is used for the purposes indicated in the grant request. In certain cases, the recipient may be asked to sign a statement to this effect. If for any reason the grant is used for other than the stated purpose, the Foundation reserves the right to withdraw funding.

How to Apply

- Complete all fields on the application form
- Print the completed application
- Attach supporting documentation as indicated
- Submit the application packet to First Option Bank Trust Services by the designated deadline.
- Multiple requests in a single calendar year from one organization are discouraged.

The rejection of a proposal should not be construed as a negative reaction to a particular organization or project, but rather as a selective choice on the part of the trustees to use limited resources in an alternative fashion.

All inquiries regarding the foundations should be directed to:

Charitable Foundations
First Option Bank Trust Services
Attn: Kathy Lovig, Senior Trust Officer
P O Box B, 702 Baptiste Dr
Paola KS 66071

Deadlines

All foundations meet annually in March. Requests must be received before March 1 each year to be considered. The Baehr Foundation considers requests twice each year. Any requests received after March 1 and before September 1 will be considered in the Baehr Foundation September meeting. Applying organizations should confirm meeting dates prior to submitting requests.

Trusteed Foundation Grant Application

Resources are directed to those areas where we feel the most critical needs exist and where support can have the greatest impact, focused mainly in Miami County, Kansas.

Organization Name

Address

Telephone Number

EIN

Web address or social media pages

Primary Contact Person

Primary Contact Email Address

Primary Contact Telephone Number

Specific amount requested

Challenge to be addressed

Target group for project

By signing and submitting this grant application, I agree to report to the foundation trustees evaluation procedures and final results of programs to which support has been given.

Signature

Date

Required supporting documentation to include in application packet

- A. Verification of community need
- B. Project goals, timetable and method of achieving the goals
- C. Itemized budget for the project
- D. Brief history of the organization and its prior accomplishments, or a copy of its most recent annual report
- E. Audit report for the latest completed fiscal year and a statement of current operating budget, including fundraising costs
- F. Copy of the IRS Determination Letter
- G. Statement of whether proposal has been submitted to other sources for support, including a listing of those sources and amounts
- H. Board of Directors and officers of the organization and their affiliations

All foundations meet annually in March. Requests must be received before March 1 each year to be considered. The Baehr Foundation considers requests twice each year. Any requests received after March 1 and before September 1 will be considered in the Baehr Foundation September meeting. Applying organizations should confirm meeting dates prior to submitting request.

A copy of the proposal must be submitted prior to the March 1 or September 1 deadline to:

Charitable Foundations
First Option Bank Trust Services
Attn: Kathy Lovig, Senior Trust Officer
P O Box B, 702 Baptiste Dr
Paola KS 66071

The requesting organization will be sent written notification of the status of the request within twelve weeks following receipt of a proposal.

The rejection of a proposal should not be construed as a negative reaction to a particular organization or project, but rather as a selective choice on the part of the Foundation Selection Committee to use limited resources in an alternative fashion. Multiple requests in a single calendar year from one organization are discouraged.