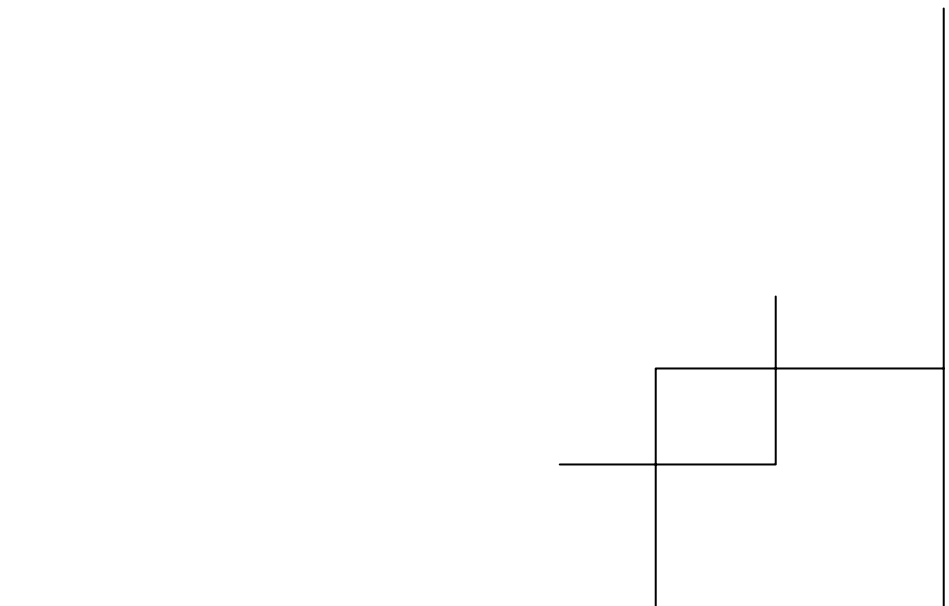


**Annunciation Grant
Application Guidelines**



About the Incarnate Word Foundation

For more than 100 years the Sisters of Charity of the Incarnate Word, San Antonio, have cared for the people of St. Louis and the surrounding communities. When the sisters' Incarnate Word Hospital, a part of Deaconess Incarnate Word Health System, was sold in 1997, the foundation was endowed with \$30 million to continue their mission. Since its inception, the foundation has supported community organizations that address the root causes of problems with the goal of building healthy communities.

Our Mission

As a ministry of the Sisters of Charity of the Incarnate Word, San Antonio, the Incarnate Word Foundation mission is to make real the healing ministry of Jesus Christ, the Incarnate Word.

Our Values

The Incarnate Word Foundation partners with women and men religious, churches, agencies, philanthropic entities, and other community groups to improve health and quality of life in the community with a particular emphasis on the economically poor, especially women, children, and seniors.

Incarnational spirituality

- Compassion
- Growth
- Development

Dignity

- Empowerment
- Diversity
- Respect

Partnering

- Relationship/Collaboration
- Community focus
- Effective stewardship

Inventiveness

- Holistic approach
- Community focus
- Systemic change

Stewardship/Accountability

- Responsiveness
- People
- Time
- Talent

Our Activities

- Grant making
- Proactive collaboration
- Fostering public policy discussion
- Testing solutions
- Improving understanding of healthy communities
- Promoting leadership development

Areas of Interest

In awarding grants, the Incarnate Word Foundation focuses on grantees whose mission and values are compatible with those of the foundation. An underlying premise of the foundation's grant making is an emphasis on service to the economically poor. The foundation's focus areas are:

➤ **WOMEN: To empower women through education**

Underlying parameters:

- Services should provide specific educational opportunities.
- Education is viewed in a broad way that encompasses areas such as academics, job training, life skills training, health promotion and prevention, and spirituality.
- Approaches that include a relational component are preferred rather than a more general approach.
- An emphasis on empowerment and self-sufficiency is encouraged.



➤ **CHILDREN: To promote resiliency and holistic health in children who face the challenge of various types of poverty**

Underlying parameters:

- Efforts that lend themselves to producing long-term, in-depth relationships are of most interest.
- Efforts to promote wellness and holistic health are of interest.
- Approaches that bring about change in the individual are preferred rather than a more general approach.

- **SENIORS:** To support senior citizens in their efforts to have a high quality of life by ensuring safe living environments, good nutrition, and opportunities for socialization and spiritual growth

Underlying parameters:

- Efforts to support self-management and independent living are encouraged.
- Efforts that lend themselves to producing long-term, in-depth relationships are of more interest.
- Efforts to promote wellness and preventive lifestyles and habits are of interest.

- **SYSTEMIC CHANGE:** To work toward systemic change in issue areas that relate to the Chapter Directives of the Sisters of Charity of the Incarnate Word

Underlying parameters:

- Efforts will represent a long-term commitment and will include a collaborative component among agencies and funders.
- Efforts will extend the presence of the Sisters of Charity of the Incarnate Word in the community.

At present, the foundation's efforts in systemic change are focused on multiculturalism and on the Neighborhood Project, a partnership effort in which the foundation is developing relationships in the 63104 and 63118 zip codes on the near south side of St. Louis City.



General Funding Priorities

Compatibility of the organization's mission and values with those of the foundation is a key criterion for funding. Short-term interventions are of less interest, and a spiritual component to the organization's approach is seen in a positive light.

The foundation funds programs that promote healthy communities, address the root causes of problems, and involve collaboration. Applications from religiously sponsored groups are encouraged. Agencies should have defined outcomes that address how the overall agency mission is being accomplished.

Applicants should consider carefully whether their mission and values are in alignment with those of the foundation and not alter those to fit the foundation's mission, values, and focus areas. The foundation receives many more applications than can be funded. Because of this, many worthy agencies are not funded.

Foundation staff are available to talk with prospective applicants who have questions about the appropriateness of a funding request. The foundation periodically hosts orientation sessions where applicants may learn about the foundation's mission, values, vision, and priority areas. New applicants are strongly encouraged to attend an orientation session.

Who Can Apply for Grants

Applicants can apply for funding for programs in the St. Louis metropolitan area, that is, St. Louis City, and St. Louis, Jefferson, St. Charles, Franklin, Warren, and Lincoln counties in Missouri, and Madison and St. Clair counties in Illinois. In addition, the foundation provides grant funding to the following communities in Missouri where the Sisters of Charity of the Incarnate Word have ministered:

Boonville	Macon
California	Monroe City
Canton	Old Mines
Columbia	Potosi
Ellington	Rolla
Jefferson City	Sedalia
Kansas City	Springfield
Kirksville	St. James/Rosati
Lebanon	St. Patrick

Applicants must be tax exempt under IRS Section 501(c)(3). Catholic organizations may use the USCC tax ruling if they are listed in the *Official Catholic Directory*.

The Incarnate Word Foundation does *not* make grants to:

- Individuals
- Endowment funds
- Annual campaigns
- Biomedical or clinical research programs
- Colleges and universities
- Political activities
- Fundraising events
- Private foundations



How to Apply for an Annunciation Grant

Following are the guidelines for our Annunciation Grants program, which provides grants of \$10,000 or less.

Concept Paper

The initial step in obtaining an Annunciation Grant is to submit a concept paper.

The following information should be included as the heading for the concept paper:

Name of organization	Contact name/title
Address	Total annual budget
Telephone number and fax number	Amount of request
E-mail address (if available)	Primary geographic area served
Website (if available)	

The narrative portion of the concept paper is limited to **500 words or less**. The concept paper should address the following:

- Organization mission: How does that mission relate to that of the foundation?
- Organization vision: How does that vision relate to that of the foundation?
- Organization values: How are those values in sync with those of the foundation?
- Goals of the organization: What is the organization attempting to accomplish?
- People served: What are the target populations of the organization's work?
- Primary programs/services offered: How do those services achieve the goals?
- Relationships with other agencies: What is your involvement with other agencies and groups that serve the same populations?
- Challenges the organization faces: How will working with the foundation enable the organization to address these challenges?

Attachments are limited to a list of board members and a tax determination letter, both of which are required.

The deadline for submitting the concept paper is May 1 at 4:30 p.m. Concept papers that are postmarked May 1 will also be accepted. No concept papers will be accepted after the deadline. Faxed or e-mailed concept papers are not accepted.

Concept papers that are received by the deadline and that include all required materials will be reviewed in terms of how well the agency's mission, values, programs, and services mesh with those of the foundation. Those that fit most closely will be invited to submit a full grant proposal. Applications that do not meet these parameters are declined. **All applicants will receive notification by June 1.**

Full Grant Proposal

If your agency is invited to submit a full proposal for the Annunciation Grant, that application should include the following:

Completed proposal summary form See proposal coversheet at end of this document. Note: You may submit this information on your own typed form so long as it does not exceed **one page**. The form can be found at the end of this document.

Narrative Section (not to exceed four pages)

- Organization's mission, goals, values, and accomplishments
- Population(s) to be served
- Description of programs and services, including goals and objectives
- Anticipated outcomes and how those will be measured
- Information about other agencies, organizations, or groups with which you coordinate activities and/or collaborate

Budget (There is a sample budget form at the end of the Guidelines, which can be completed on line [www.incarnatewordfund.com], or you may use your own agency form.)

- Current year's operating budget for the organization

Supporting Materials

- IRS tax determination letter indicating tax-exempt status
- Listing of Board of Trustees, including officers, or listing of Advisory Group
- Three letters of support

Two complete copies of the proposal should be sent to the foundation along with two copies of the supporting materials.

The deadline for submitting the full grant proposal is July 1 at 4:30 p.m. Proposals that are postmarked July 1 will also be accepted. No proposals will be accepted after the deadline. Faxed or e-mailed proposals are not accepted.

How Grants Are Reviewed

Grant applications that are received by the deadline, that include all required materials, and that are consistent with the foundation's areas of interest, mission, and values are accepted for review. Applications that do not meet these parameters are declined. (Invitation to submit a full application is a prerequisite.)

The steps of the review process are as follows:

- Foundation staff reviews applications for completeness.
- Staff assesses applications for consistency with the foundation's mission, core values, and areas of interest and clarifies questions with applicants.
- Staff develops proposal critiques and summaries for the Grant Review Committee of the foundation's board.
- The Grant Review Committee recommends proposals to be funded.
- The full foundation board reviews the committee's recommendations and determines the final selection.

Timeline

May 1	Application deadline for concept paper
June 1	Notifications on whether agency is invited to submit full proposal
July 1	Application deadline for full proposal
July 1-August 15	Staff review
August 15- September 1	Grant Review Committee review
September 15	Foundation board decision
October 1	Agency notifications on grant awards
October 30	Selected agencies receive funds

If You Receive a Grant

Recipients of a foundation grant are required to complete a final evaluation form. Each agency will also be asked to submit outcomes that measure how the agency is accomplishing its mission. In addition, foundation representatives will conduct a site visit.

SAMPLE BUDGET FORM

Agency name _____

Total agency budget _____

Incarnate Word Annunciation Grant amount requested _____

AGENCY EXPENDITURES

Sources of Income

Expense	Annunciation Grant	Agency funds	Other confirmed	Other projected	In-kind	Total
Personnel						
Fringe benefits						
Consulting						
Office supplies/ Administration						
Rent/Utilities						
Program expense (specify)						
1						
2						
3						
Travel Conferences						
Equipment						
Other (specify)						
1						
2						
3						
TOTAL						

MAJOR SOURCES OF REVENUE

Source	Amount	Received	Pending
1			
2			
3			
4			

Also available online at www.incarnatewordfund.com



INCARNATE WORD FOUNDATION
SISTERS OF CHARITY OF THE INCARNATE WORD

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