



The John H. Emery Rail Heritage Trust Grant Application Form

Applications will be accepted up to 11:59 pm February 1st of each year. Please read the purposes of the Emery Rail Heritage Trust, the outlined application procedures and the terms and conditions carefully before preparing the application, all found at <https://emeryrailheritagetrust.org/WP/>. Please Email this form and all supporting documents to: applications@emeryrailheritagetrust.org Please complete ALL requested information. Failure to do so could result in disqualification. All information must be typed.

Section 1 – Background Information

1. Date of this Application: Amount Requested: \$
2. Organization's Legal Name:
3. Doing business as (if applicable):
4. Physical Street Address:
5. Physical Street Address:
6. City, State and ZIP:
7. Mailing Address (if different):
8. City, State & Zip:
9. Office Phone Number:
10. Website Address:
11. Brief Description of Project:
12. Are you a Non-Profit: Yes No
13. Are you Tax Exempt: Yes No Tax Exempt ID #
14. Contact Person:
15. Contact Person Title:
16. Contact Phone Numbers: Day: Night: Cell:
17. E-Mail Address:
18. Year your group was founded:
19. Budget for Current Year:
20. List Major Funding Sources:
21. Please provide ridership counts or estimates from last year.

Section 2 – Organization History and Overview

1. Concise Mission Statement:

2. Brief description of major current projects, programs and activities:

3. Description of major past goals met and achievements:

4. For equipment, where will it run? If the proposed location is not owned directly by your group do you have a current legally binding agreement to allow operation on the proposed trackage? Please attach all such agreements and leases.

Section 3 – Proposal Information

1. Amount Requested:

2. Project Title:

3. Project Description: Include a detailed history of the item or artifact. Specify the ownership of the item or artifact. If this is a part of a larger project, briefly describe the larger project and the relationship of the “part” to the “whole.” For attachments and photos, please Email with this form.

4. Relevancy: Describe how this project meets the principles of the Emery Rail Heritage Trust.

5. Project Schedule: Include planned project schedule including start date and estimated completion date. If this is part of a larger project, give dates for both.

6. Project Budget: List amounts to be used for materials, hired labor and an estimate of volunteer hours. It is understood that exact numbers may not be available before a project is begun – identify estimates if used. Include cost estimates from outside vendors and suppliers. Do not assign or include dollar values to any hours performed by volunteers. Volunteer time is by definition unpaid.

7. Other Fundraising: Specify how much money (if any) in total has already been raised each year toward this project. Identify any other grants or sources of income and the amounts received for this project, if any. Specify how many volunteer hours have been spent on this project.

8. Membership: How many members are in your group? How many will be working on this project?

9. Paid Staff: How many paid staff does your organization employ? _____ How much per year is paid in salaries/wages?" _____ Totals will suffice.

10. Financial: Discuss the success of previous fundraising efforts for this and other projects and the success of your organization in meeting any previous matching grants. Please attach a profit and loss statement and balance sheet for the previous fiscal year (this is requested solely to determine your organization's ability to maintain restored assets in good condition and ability to raise money.) Are you satisfied that you will have appropriate operating funds to cover any potential insurance requirements?

11. Once this project is completed, how will ongoing maintenance be funded?

12. Are you willing for representatives of the ERHT to inspect the progress of the work done, the quality of the work done, and the financial books, paperwork, receipts, etc., should you be awarded a grant? Are you also willing to make reports as requested by the Trust in writing to the ERHT as work progresses? Yes No

13. Explain how you plan to recognize the Emery Rail Heritage Trust for any grant that is received. All grants received from the Emery Rail Heritage Trust may be recognized by a news release to local media or national rail history sites. They MUST also be recognized by a permanent plate, plaque, certificate, or similar instrument that is appropriately placed either on or in the piece of equipment if possible or elsewhere on the organization's property where it is highly visible to the public. Please attach a photograph and description of all such recognition. Failure to provide the above means of recognition may prevent your organization from receiving current or future funding.

14. Identify any special programs that your organization uses to attract and train new members, especially youth, to the rail preservation movement, and explain how successful they have been (number of personnel involved, retention rates, etc.). Do you have an apprenticeship program?

15. Please attach a copy of your non-discrimination policy that you use for your website, and other brochures, paperwork, etc. This could be very similar to the Emery Trust policy as listed on our website, as reference.

16. Attachment Checklist. Please mark each separate attached file with appropriate letter as noted below. All supporting files and documents must be sent as individual PDF files clearly labeled as to what they are. Do not combine files.

- A. IRS letter of determination for 501 (c) (3) non-profit status.
- B. IRS yearly filing form 990, 990EZ, or 990N that was most recently completed.
- C. Balance sheet and detailed profit and loss statement for previous fiscal year end.
- D. Copy of lease or agreement for equipment or artifact, if not owned.
- E. Photos of artifact (along with diagrams and descriptive literature if applicable).
- F. Project budget, if not previously included in Section III #6.
- G. Copy of any prior publicity AND photo of posted plaque or certificate from prior Emery Heritage Trust Grants.
- H. Copy of your organization's non-discrimination policy.
- I. Copy of operating agreement from organization where equipment will run if you do not own the location where it will run.

Section 4 – Certification and Signatures

I hereby certify that the information contained in this application is true and correct to the best of my knowledge, and I authorize the John H. Emery Rail Heritage Trust to publicly disclose any grant that is approved as a result of this application. Any grant monies received will be used for the purpose(s) or project(s) indicated on this application.

In the event that we are awarded a grant, we agree to issue a final report at the completion of the project as requested by the trust. We further agree to allow representative(s) of the Emery Rail Heritage Trust to periodically inspect the progress. Finally, we agree to acknowledge and memorialize the Trust as agreed to.

Organization Executive Director (or equivalent):

Name and Title

Signature

Date

Organization Board Chair (or equivalent):

Name and Title

Signature

Date

Printing your name above is legally binding contract

Please Email this form and all supporting documents to:
applications@emeryrailheritagetrust.org

ERHT office use only:

Date Received:

Date Acknowledged:

Decision Date:

Amount Awarded:

Notification Date:

Check #/Date/Amount: