

Guidelines for Submission of Funding Requests for Consideration by AICPA Foundation Board of Trustees

To submit a proposal to the Foundation for funding/partial funding of a project or program, requestors must complete the Program Proposal/Funding Request form **and** include a one-page budget document that provides a line-item detail of all expenses related to the specific funding request.

In addition to the Program Proposal/Funding Request form **and** Budget Document, requestors may also submit any combination of the following to help support the submission:

- A Word Document not to exceed three pages in length, double spaced
- A PowerPoint presentation not to exceed 10 slides
- An Excel file not to exceed two pages (8 ½ x 11)

NOTE: Submissions may include any combination of the above noted support materials and **must** be formatted as a print-ready document which will comply with layout of a standard 8 ½ x 11 sheet of paper.

It will be at the discretion of the AICPA Foundation Board of Trustees as to whether a formal presentation of the submitted request will be available. If a formal presentation (whether in-person or via teleconference) is requested by the AICPA Foundation Board of Trustees, the staff liaison of the Foundation will contact the Requestor in advance of the meeting to arrange the date/time.

Overriding principles that will apply in evaluating funding proposals:

- Program is consistent with the AICPA Foundation's mission, values and vision;
- Requests for partial funding or funding in its entirety will be considered
- Measurable outcomes (how do we know desired results were achieved)
- Purpose of the request should be consistent with the goals of the Committee (e.g. improving the representation of minorities in the profession), and should focus on minority students
- Purpose of the request should be considered 'essential' vs 'nice to do'
- Priority should be given to requests in which there would be direct benefit to audiences/groups (vs. substantial portions of the fund in support of administrative costs)
- Requests offering long term results should receive priority over those with only short term outcomes
- Stated outcomes should be specific and measurable
- Support requests that provide a high level of visibility for the Institute and the Profession
- No funding will be provided if the organization is 'for profit'
- Preference will be given to projects that already have committed resources and other elements of support;
- Partnering with other foundations and organizations is desirable
- If the organization does not have its own Foundation that can offer support
- No funding for capital improvements such as buildings

Return to completed applications to: Foundation@aicpa.org