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CPAs Helping Schools

2022 - 2023 Application

Educational Program Financial Assistance Grant

Grades Pre-K – 12

Established in 1991, the **CPAs Helping Schools** program encourages CPAs to become actively involved with the education of Texas youth.  **Dedicated to improving the quality and scope of education Pre-K through grade 12**, this initiative offers TXCPA Houston members an opportunity to get actively involved in support of their local schools.

Financial contribution for educational programs will be considered for any school located within the **13-county membership** area of the Houston TSCPA Foundation (d/b/a Houston CPA Society). *These Texas counties include Austin, Brazoria, Colorado, Fayette, Fort Bend, Galveston, Harris, Montgomery, Polk, San Jacinto, Trinity, Walker, and Waller.*

**For consideration in the next review**

1. Completely read instructions
2. Complete the following *three-page application* (maximum)
3. Submit electronically, retaining all formatting.

**Do NOT submit as a PDF or document type other than MS Word.**

**2022 – 2023 Schedule of application deadlines**

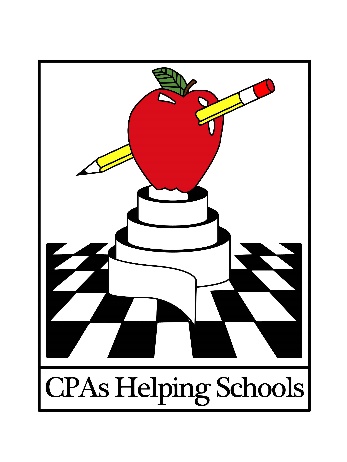
**November 4, 2022** (approved funds delivered by February 28, 2023)

**April 21, 2023** (approved funds delivered by July 31, 2023)

CPAs Helping Schools will review requests within six weeks of the above submission dates; notify grant writer with approval results within a month of review date; distribute approved funds as noted above.

**Electronic submission of original MS Word application & documentation**

to: [cspencer@txcpahouston.cpa](mailto:cspencer@txcpahouston.cpa)



**EMAIL SUBJECT LINE should INCLUDE the SCHOOL NAME**

**TXCPA Houston, CPAs Helping Schools**

**Attn: Carol Spencer**

1233 West Loop South, Suite 1425, Houston, TX 77027

Email: [cspencer@txcpahouston.cpa](mailto:cspencer@txcpahouston.cpa)

**Please call (832) 831-9232 if you have any questions.**

**GoogleForm option:** <https://docs.google.com/forms/d/1eUgVu-mvJuBrti2WL6Cvjmoq2eS5ZaNbQpq5-R3Y2vA/edit?usp=sharing>

**CPAs Helping Schools Grant Program Instructions**

1. Funding is available to public, private and parochial campuses, with grades **Pre-K through 12** eligible.

Requests for programs in Pre-K - teacher eligibility requirements for funding: *1) a Bachelor’s degree, 2) Certification in Education, and 3) Following a structured curriculum.*

1. In their review of requests, the committee will look at several factors including:
2. *school socio-economic level,*
3. *number of students impacted by the program (or reuse of purchased materials for future classes),*
4. *local community business support in consideration of fund allocation*
5. *how the planned program might benefit the accounting profession*
6. *whether a licensed CPA serves in a volunteer capacity at the school, and is involved in the requested program*

3) School should complete the application and submit as **MS Word document** via email to the Houston CPA Society. Signature page may be scanned and emailed.

1. The application and requested information should specify
2. *The detailed need for the funds; and*
3. *Exactly how the school plans to use the funds.*

5) Funding requests should be for the educational benefit of the students. This may include, but is not limited to, books, educational materials and equipment, supplies, and school uniforms. Other previously funded programs include technology, math labs, established reading courses, fine arts programs, after-school activities, science labs, QuickBooks Certification and much more.

1. *The committee focus will be how many students are reached by this program and how much, if any, of the purchased materials can be reused by future classes.*
2. *For technology or transportation requests, the committee focus will be adequate explanation on the specific needs and usage; extra deliberation will be required for requests of funding for tablets due to ever-changing technology.*

*c) Requests for funding of items that require ongoing maintenance (i.e. subscription or license renewals, equipment maintenance) should specify the school’s plans to cover these future costs*

6) While a funding limit of $5,000 per school year is currently allowed per campus, this amount is seldom funded due to the number of viable applications reviewed. Committee will award funds to impact the greater number of at-risk students; funds are seldom awarded for instructor training.

7) Any purchases with funds provided by CPAs Helping Schools through TXCPA Houston (Houston TSCPA Foundation) MUST remain with the campus of record. Purchases are not transferable if an applicant relocates to another campus.

8) Schools receiving funding awards **must submit follow-up correspondence**,

1. Within 30 days of spending the awarded funds:

*Submit copies of applicable receipts of items purchased*

1. Within 30 days of receipt of purchased materials:

*Submit photos of materials and students, or short narrative explaining the integration of purchased materials into the classroom*

1. Semester update:

*How the program was initiated; student interest; student acceptance, other data*

1. Annual update:

*Success of the program through measured reports, student interest, ongoing plans*

1. Invite CPAs Helping Schools volunteers to visit the school to view the ongoing progress

**Adherence to these requirements will be considered in future grant applications**

9) Thank you letters and photos of the project's ongoing progress are appreciated for TXCPA Houston newsletter publication. Photos should include the name and title/school position of any photo subject. Photos of students may not be used in publication unless school acknowledges they have required documents on file. Student photos may be included in CPAs Helping Schools’ display, at the discretion of the Houston CPA Society, for sponsored membership or continuing education events, or in weekly e-Bulletin or other communications to membership. School personnel have the responsibility of ensuring photo legality for publication.

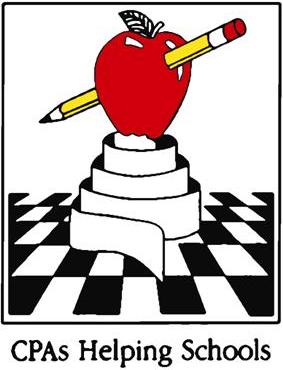
**TXCPA Houston/ Houston TSCPA Foundation**

A Chapter of the Texas Society of Certified Public Accountants

CPAs Helping Schools 2022 - 2023 Application for

Grades Pre-K – 12 Educational Program Financial Assistance Grant

Read ALL instructions before completing application



**Application Date**: **Involved Grade Level**(s): **Amount** (agrees with budget): $\_\_\_\_\_\_\_\_\_

|  |  |
| --- | --- |
| Project Title: | |
| School (Payee) Name: | District: |
| Campus Address: | City, Zip: |
| Principal’s Name: | School Phone**:** |
| Principal’s email: | |
| Applicant Name:  School Position/Title: | Applicant Phone: |
| Applicant emails (school **and** personal): | |
| Applicant mailing address (if request is not from a school employee) | Best time to call: |
|  | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Estimated Expenditure Date of funds/ Deadline to receive funds | | | |  | |
| What is lowest amount needed to *initiate* the program?  *If the initial amount is funded, an updated application is required for additional funding.* | | | | $ | |
|  | | | | | |
| Is your school Title I? | | Yes No | | | |
| Names of any CPA volunteers on campus, if known |  | | | | |
| Names of any CPA volunteers involved in requested program, if known | |  | | | |
| Number of students enrolled in current school year. | | |  | | |
| Socio-economic level (Number of students participating under CEP, free or reduced lunch program, *or the number receiving scholarship if a private or parochial school)* | | |  | | % |
| Number of students directly involved in this requested program | |  | | | % |
| Will your purchases be available for students in future years?  If yes, what amount of the grant request is for re-usable materials? | |  | | | $ |
| Other local business **support for this requested project**. | |  | | | |
| Other financial **support for this requested project**. | |  | | | |
| Is this request for a continuing program at the campus?  If yes, **how many years** has the program been in place? | |  | |  | |
| How did you learn of this financial opportunity? | |  | | | |
| What is the best day of the week if one of our committee members wants to visit your school? | |  | | | |
| This application is: 🞎 First Time application (this program) 🞎 Revision of prior application  🞎 Supplemental application for additional funding of prior grant **Primary (1) Category (**refer to list below): | | | | | |

**Category** (place number of ***primary*** applicable category in space above)

1. After-school program
2. Books / Reading Program
3. Career
4. Fine Arts Education
5. Health/ Wellness
6. History/ Social Studies
7. Math/ Accounting
8. Personal Development (student)
9. Science/ Environmental
10. Special Needs Education
11. STEM/STEAM specific
12. Technology
13. Tutoring/ Mentoring program
14. Uniforms

SCHOOL NAME:

PROGRAM TITLE:

**Note: If this is a supplemental application for additional funding of prior grant**,you should provide a narrative of *how the program was initiated, the progress of the program, any available reports of students’ educational and/or behavioral improvements, and any other information you believe to be critical for the committee’s review of your request*.

1. *Please provide a short and concise summary of facts covering the Who, What, When, Why, and How of your proposal. Imagine this is the only information you can provide to the committee in a one-minute speech to garner their approval*. The summary should include a description of the project, the current need for the project, why the students will benefit, and the *educational* goals of the project (*what this project will accomplish*):
2. *List or describe the methods the school will use to achieve the project goals, including the plan of action, and any justification needed for this approach.*
3. *Does your program rely on parental involvement or at-home study? If so, what parental involvement is expected? What is your follow-up with the parent regarding student at-home study?*
4. *List or describe your project timeline*:
5. *List or describe your future plans for the program, ability to provide for potential future costs,* and *any anticipated barriers to achieving your projected goals, plus the strategy to negotiate these challenges*:
6. **Budget:** present a detailed listing of the estimated cost of the project (using similar chart as below, or Excel worksheet data. **The list of items must agree with the total amount on your grant application.**

* **List your items in order of priority for the program’s success/implementation**

*(if minimum funds are considered, it is anticipated the top item(s) will be purchased first).*

* Include where pricing/estimate was obtained (vendor, Web site, catalogue, etc.)
* Explain the need for items that are not contained in your above narrative.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Priority | Item Name | Quantity | Unit Cost | Total | Notes (vendor) |
| 1. |  |  |  |  |  |
| 2. |  |  |  |  |  |
| 3. |  |  |  |  |  |
| 4. |  |  |  |  |  |
| 5. |  |  |  |  |  |
| 6. |  |  |  |  |  |
| 7. |  |  |  |  |  |
|  |  |  |  |  |  |

By affixing my signature, I confirm that I have read the grant application instructions, and all information and expectations are correct to the best of my knowledge. I am aware of the requirements for follow-up reports if this requested is granted. I acknowledge that all purchases from any funds allocated will remain with this campus.

Applicant Signature /date Principal Signature /date

**Note: signature page ONLY may be scanned and emailed as a PDF file or photo. Email the application in the original format as a MS Word document.**

**TECHNOLOGY ADDENDUM**

If your request is for **any technological or electronic devices**, please complete this page and submit with your primary grant application.

For the committee to consider funding/partial funding for personal computers, laptop computers, tablets, and such:

1. Provide documentation that the district’s IT Department has approved the request and will support the ongoing maintenance of the items, should they be funded. Send a letter or email with signature of IT Department representative to this effect.
2. What is the anticipated life of this equipment? How long do you expect them to remain viable in the classroom?
3. Security – how and where will the devices be stored? Who has access to the devices? What are procedures for checking out and returning devices? Provide any and all information pertinent to the storage and security.
4. Ownership – confirmation that ownership of items will maintain at this campus (include on primary application also), should the grant applicant move to another campus or district.
5. What Apps for education do you plan to incorporate into the instruction with use of the equipment, if funded?
6. Who will provide funding for Apps, now and in the future?
7. What specific educational needs will these devices meet?