The Foundation Roundtable of Santa Barbara County 2020 Common Grant Application

The Common Grant Application is designed as a labor-saving device for organizations seeking grants from multiple foundations located in **Santa Barbara County,** and was developed by The Foundation Roundtable, a local regional association of grantmakers. The purpose of The Foundation Roundtable is to advance and support philanthropy. This common application format is one way of addressing our mission.

The Foundation Roundtable Common Grant Application form is available on the Santa Barbara Foundation website at: www.sbfoundation.org/foundationroundtable

This document has been formatted so that information can be inputted directly. Please save this document to your computer so that you will not lose your information. Once you have completed the grant application, you can either email it directly to the organization or print out and send it through the mail.

Please do not use commas to separate thousands when entering numerical data and do not use brackets for negative numbers on returns; use a minus sign to show that the amount is negative (Example: -112345.00).

<div style="border:1px solid black">

ALERT:

Each participating foundation has individual instructions to customize the application as necessary, i.e., to communicate deadlines, list any additional requirements (query letter, number of copies, supplementary attachments, etc.) or identify pages that are not required.

YOU MUST CONTACT THE INDIVIDUAL FOUNDATIONS FOR THEIR INSTRUCTIONS.

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Participating Funders List

The following foundations accept The Foundation Roundtable Common Grant Application:

The Towbes Foundation	Brittingham Family Foundation
St. Francis Foundation	Crawford Idema Family Foundation
McCune Foundation	Fund for Santa Barbara
La Centra-Sumerlin Foundation	Ridley-Tree Foundation
Santa Ynez Valley Foundation	Chumash Foundation
James S. Bower Foundation	Venoco, Inc.
The Henry E. & Lola Monroe Foundation	

The Spanish language version is available from the Fund for Santa Barbara, 805-962-9164. Not all foundations accept this version, please contact the foundation to which you are applying first.

La versión en español está disponible de parte de Fund for Santa Barbara, 805-962-9164. No todas las fundaciones aceptan esta versión; llámaselas primero.

The Foundation Roundtable: Common Grant Application

Application Checklist

Ensure that you have a copy of the most recent version of the Common Grant Application by checking the version listed on the SBF website. Please make sure all of the following information **(excluding this page)** is submitted in the listed order and in each foundation's requested format.

☐ Cover Sheet

☐ Proposal Narrative (up to 4 pages)

☐ Board of Directors/Governing Body List

☐ Project Budget

☐ Organization Financial Summary

☐ Organization Balance Sheet

☐ A Copy of Your IRS Final Determination 501(c)(3) Letter

If your organization <u>does not</u> have 501(c)(3) status, check with the funder to see if it is willing to fund your organization directly or is willing to fund your organization through your fiscal sponsor. Additional information may be required to do so.

Additional Items as Required by Each Foundation

Participating foundations <u>will require</u> additional information or will have specific submission instructions. **You <u>must</u> contact each foundation directly for this information.**

Strategies for Successful Grant-Seeking:

♣ Research the funding interests of each foundation before applying, and obtain a copy of its annual report and/or guidelines.
♣ Familiarize yourself with the funder's application process, including timetable and preferred method of initial contact. It is important to note that some funders accept proposals only after an initial phone call, query letter or pre-application form. Application workshops may be required or encouraged. **In general, it is never a good idea to send out a mass mailing of proposals.**
♣ Follow the attached application format and any specific instructions from the funder outlined on its individual instruction sheet. The Foundation Roundtable does not accept applications itself. All proposals should be sent to the individual foundation to which you are applying.

The Foundation Roundtable: Common Grant Application

Cover Sheet

Foundation you are applying to: _____

Legal Name of Applicant Organization: _____

Project Name (if applicable): _____

Funds will pay for: _____

Full Mailing Address: _____

Location(s) if different from above: _____

Executive Director: _____

Phone: _____ Fax: _____

Email: _____ Website: _____

Contact Person & Title: _____ Phone: _____

Tax-exempt Status:(Most foundations require 501(c)(3) status. You must check this requirement before applying.)

501(c)(3) Granted ☐   Tax I.D. Number: _____ Other: _____

Type of Request: *Check with individual foundations to determine the types of accepted grant requests.*

General Support ☐   Program Support ☐   Seed Funding ☐   Research ☐

Capital ☐   Endowment ☐   Multi-Year ☐   Other: _____

This Grant Request: $ _____   Total Project Budget: $ _____

Grant Period from: _____ To: _____

Total Organizational Budget for Current Year: $ _____   Fiscal year begins: _____

Summarize the organization's mission statement (two to three sentences):

Summarize your grant request (two to three sentences):

Proposal Authorization

We certify that the information in this application is to the best of our knowledge true and accurate and is submitted with our Board of Directors'/Governing Body's full knowledge and endorsement:

_____ _____ _____
Signature   Name & Title of Authorized Board/Governing Body Representative Date

_____ _____ _____
Signature   Name & Title of Authorized Board/Governing Body Representative Date

Proposal Narrative

Directions: Limit your Proposal Narrative to **four (4) pages maximum, with 0.8 inch margins, 12 point font or larger**. Fill in each section using the specific questions below as boldface headings with your responses in normal text.

<u>Background (One page or less)</u>

1. Your organization's history and accomplishments.

2. Your current programs and activities. Include the constituency you serve, with specific demographic information. How are they actively involved in your organization and/or how do they benefit from your organization's work?

3. Your organization's relationships – both formal and informal – with other organizations working to meet the same need. In what way does your work differ from that of other organizations?

<u>Funding Request</u>

1. What need or problem does your project work to address?

2. In a short paragraph, tell us your project's (or organization's) goals and the specific outcomes you project for the grant period (i.e. numbers served, behavior or attitudes changed, capital project completed, etc.).

3. Describe your project or the capital items requested, including:
   - Whether the project is new, ongoing or an expansion
   - Target audience, including specific demographic information
   - Activities/strategies that will be used to meet your stated outcomes
   - General timeline for the main objectives of your project

4. If this is a request for General Support, what are your organization's most pressing needs?

5. How do you plan to evaluate the effectiveness or impact of the project?

6. Summarize the skills and relevant experience of key staff/volunteers essential to the project's success. If other organizations are collaborating on this project, note which ones and in what ways.

7. If full funding is not available, what is the contingency plan for securing additional support and/or how can you modify your proposal?

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Board of Directors/Governing Body

Directions: Attach additional sheets if necessary.

Name	City	Affiliation/Profession	Board Position	Yrs. of Service

How often does your governing body meet? _____

Project Budget

Note: Check with each foundation to see if this form is required.

Organization Name:

Name of Project (if different):

Budget dates for grant period:

NOTE - Do not use commas as thousand separators in any of the numerical fields

INCOME
Possible categories: Government grants, foundation grants, individuals, business support, events, fees for service, etc.

Source	Total Project ($)	Pending ($)	Secured ($)	Notes
TOTAL INCOME				

List the In-Kind (non-cash) contributions:

EXPENSES
Possible categories: Salaries, professional fees, rent and utilities, travel, publicity/outreach, events, capital items, etc.

Item	Total Project ($)	This Request ($)	Notes
TOTAL EXPENSES			

The Foundation Roundtable: Common Grant Application
Organization Financial Summary

Note: Check with each foundation to see if this form is required.

Organization Name: _____ Fiscal Year Dates: _____

INCOME
Possible categories: Government grants, foundation grants, individuals, business support, events, fees for service, etc.

Source	Prior Year's Actual	Projected Annual Budget ($)	YTD Actual ($) as of [ ]
TOTAL INCOME			

List the In-Kind (non-cash) contributions: _____

EXPENSES
Possible categories: Salaries, professional fees, rent and utilities, travel, publicity/outreach, events, etc.

Item	Prior Year's Actual	Annual Budget ($)	YTD Actual ($) as of [ ]
TOTAL EXPENSE			
NET PROFIT OR LOSS			

Total Capital Expenses			

i.e., computers, vehicles, building improvements, etc.:

Notes:

Organization Balance Sheet Summary

Note: Check with each foundation to see if this form is required.

ASSETS	MOST CURRENT ($) as of [ ]	PRIOR YEAR CLOSE ($)
Current Assets		
Cash and Equivalents		
Accounts Receivable		
Prepaid Expenses		
Inventory		
Grants/Pledges Receivable		
Other		
Fixed Assets (Net)		
Property		
Buildings		
Equipment		
Investments		
Endowments		
Other		
TOTAL ASSETS		
LIABILITIES		
Current Liabilities		
Accounts Payable		
Accrued Expenses		
Long Term Debt (Current Portion)		
Short Term Debt		
Other		
Long Term Debt (over a year)		
Loan		
Other		
TOTAL LIABILITIES		
Net Assets		
Unrestricted		
Temporarily Restricted		
Permanently Restricted		
TOTAL LIABILITIES AND NET ASSETS		