

## How to apply for a grant

June, 2007

Crockett Community Foundation does not discriminate or give preference on the basis of race, religion, sex, age, national origin or disabilities in the hiring of staff or providing of services.

### Mission Statement

The mission of the Crockett Community Foundation is to enhance the quality of life in the Crockett Community, now and for generations to come.

- ◇ Serve all segments of the Crockett Community
- ◇ Promote the vitality of nonprofit organizations
- ◇ Foster volunteerism in Crockett
- ◇ Promote sense of community in Crockett
- ◇ Establish a permanent endowment
- ◇ Encourage and assist donors to achieve their charitable objectives
- ◇ Evaluate the Foundation's activities and outcomes to determine their results.

The Crockett Community Foundation was established to oversee the annual community fund donations given to the Community of Crockett by Crockett Cogeneration and C&H Sugar Co., as part of the settlement agreement to the Cogeneration Plant. The Foundation receives donations and grants from other sources, as well.

A portion of the Foundation funds has been designated to establish a perpetual endowment and is therefore restricted. The remainder of the funds is referred to as unrestricted or discretionary. These are the funds that grantseekers may apply for using the following guidelines.

To effectively serve our constituency, the Community Foundation has established several

objectives which proposals should address, including:

- ◇ Provide long-lasting benefits & serve large segments of the community.
- ◇ Develop self-reliance and character, or eliminate dependency.
- ◇ Expand the capacity of volunteer organizations to serve our community.
- ◇ Demonstrate the managerial & financial capabilities of nonprofit organizations.
- ◇ Eliminate duplication of services and encourage cooperation.
- ◇ Demonstrate the ability of the organizations to combine forces and work cooperatively.
- ◇ Provide new or expanded services.
- ◇ Leverage funds from other sources.
- ◇ Projects that have demonstrated success elsewhere.

### Eligibility Requirements

1. The applying organization or agency must be operated and organized so that it does not discriminate or give preference in the hiring of staff or providing of services on the basis of race, religion, sex, age, national origin or disabilities.
2. All public non-profit organizations and public agencies providing services within the Crockett Community Services District and Tormey are eligible.
3. Projects must be located in and serve the people in the geographic area previously mentioned.
4. Applicants must be legally incorporated public non-profit organizations or be

fiscally represented by a legally incorporated public non-profit organization.

### **Eligibility Limitations**

The current objectives of the Board do not allow for grants for the following purposes:

1. Establishing endowments.
2. Religious organizations for religious purposes.
3. Direct assistance to individuals or businesses.
4. Existing obligations, deficits or retroactive funding, (i.e., a project that has already been started, money has been spent on or developed as it is related to this application).
5. Routine operating expenses or staff salaries.
6. Incurring a debt liability.
7. Conferences.
8. Political parties or organizations.
9. Replacing County funding for existing County services and responsibilities.

### **Responsibilities of Grant Recipients**

Each grant recipient is held accountable for using the Foundation grant in compliance with the proposal and any additional terms placed on the grant by the Crockett Community Foundation. In addition, each recipient must:

- Institute adequate controls over project funds to ensure that all funds are properly accounted for.
- Present invoices to the Foundation on request.
- Ensure that the Foundation is kept properly advised of significant factors affecting the successful outcome of the project or program and any significant deviation from the proposed scope, starting date or completion date of the project or program.
- Upon completion of grant expenditures provide the Foundation with a final audit of funds received and expended.

Foundation grant moneys not spent for the purposes intended by the Crockett Community Foundation in making the grant must be returned to the Foundation within 30 days of termination of the proposed project or program.

### **How to Apply**

Grants are generally made semi-annually in December and June. Applications will be accepted during the months of August - September and February - March, with the deadlines being September 30th and March 31st. Grant applications must be postmarked by the deadline or hand delivered to the Foundation office by deadline date. Grant applications may **not** be hand delivered or mailed to an individual Board member. The Foundation will be holding workshops in September and March to present the application forms, explain the grant process and answer questions. Grantseekers are encouraged to review these guidelines carefully, attend the Foundation's workshops and then submit full proposals instead of letters of inquiry or exploratory appointments and phone calls. This gives the Board an opportunity to do our homework.

Applicants must submit **1 copy of the proposal containing all of the items listed on the check list and 9 additional copies containing items 1-8 on the checklist.** Be sure to include a cover letter signed by the board officer authorized to sign for the organization. The cover letter must contain the following statement: *We (I) certify that the information contained in this proposal is to the best of our (my) knowledge true and accurate and that the proposal is submitted with the Board of Director's full knowledge and endorsement.*

### **Evaluation Criteria**

Applicants are encouraged to use the following criteria in developing their proposals. In determining the merits and priority of an application, particular consideration should be given to:

1. The results of the Foundations' annual community needs assessments.
2. The degree of potential benefit to the community.
3. The ability of the organization to achieve expected results.
4. Community or affected neighborhood support of proposal.
5. The long-term sustainability of the project.
6. The scope of the target population.
7. The Foundation Board encourages sponsors of large projects to phase the completion and funding of their projects over a multi-year period.

#### **Grant Applications Must Include**

(If any item is unavailable include a statement of explanation.)

1. Cover letter signed by the Board officer authorized to sign for the organization.
2. Checklist showing documents attached.
3. An Internal Revenue Service letter confirming the agency's tax-exempt status.
4. Grant Application Form.
5. Detailed Project Budget.
6. Detailed Project Plans including timeline.
7. Minimum two bids on work performed by independent contractors or consultants, and a minimum of two price quotes for purchases.
8. List of the Board of Directors or Officers of all organizations on the application.
9. Organization Budget.
10. A complete financial statement (audited if available) for the most recent fiscal year and a copy of the agency's most recent IRS Form 990.

Grantseekers need not contact members of our Elected Board regarding the grant process. The Foundation's Project Funding Committee will

answer questions and assist you in completing the application forms, and we encourage your inquiries.

**To set up an appointment for assistance call :  
787-9708.**

## Grant Application Checklist

THIS GRANT APPLICATION MUST INCLUDE THE FOLLOWING DOCUMENTS:  
(If any item is unavailable, include a statement of explanation)

1. Cover letter signed by the Board officer authorized to sign for the organization. The cover letter must contain the following statement:  
*We (I) certify that the information contained in this proposal is to the best of our (my) knowledge true and accurate and that the proposal is submitted with the Board of Director's full knowledge and endorsement.*
2. This Checklist showing the documents attached, in this order.
3. Internal Revenue Service determination letter confirming the organization's tax-exempt status.
4. Grant Application Form.
5. Detailed Project Budget.
6. Detailed Project Plans, including timeline.
7. Minimum two bids on work performed by independent contractors or consultants on projects over \$2,000.
8. List of the Board of Directors or Officers of all organizations which are party to the application.
9. Organization's Annual Budget.
10. Complete Financial Statement (audited if available) for the most recent fiscal year and a copy of the most recent IRS Form 990.

**Grant Application Form**

August, 07

Please return this completed form with your proposal. You may re-create this form on your computer, but please limit responses to the space allotted. You will be given an appointment to make verbal presentation.

Date: \_\_\_\_\_

Applicant Organization Name: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Contact Person/Title \_\_\_\_\_ E-mail: \_\_\_\_\_

Fiscal Sponsor (if applicable) Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Phone: \_\_\_\_\_

Relationship of Applicant to Fiscal Sponsor: \_\_\_\_\_

Project Title: \_\_\_\_\_

Amount Requested: \_\_\_\_\_

Total Project Cost : \_\_\_\_\_

Accountant or individual responsible for  
project finances and  
recordkeeping: \_\_\_\_\_

Brief Project or Program Description:

Intended starting date for project or program expenditures. Intended completion date for expenditures. Describe the sequence of activities needed to accomplish the program objectives.

Describe the intended beneficiaries of the project. Who will be better off and how, when the project is completed?

**Crockett Community Foundation**  
**Grant Application Form**

Tell us about your organization. What qualifications and experience does the applicant possess? Document past program accomplishments and show evidence of community support. How does this project relate to your organization's purposes and goals?

Summarize the specific intended outcomes of the project

How will you measure or demonstrate that these outcomes have been achieved?

If this will be an ongoing project, how will you support or maintain it in the future? At what point in time will it be self-sustaining? If this is a returning project, how successful has the project been thus far?

**Crockett Community Foundation**  
**Grant Application Form**

**PROJECT FUNDS**

**Matching Funds**

Source & availability of all additional funds for the project

Source of Funds	Amount	Commitment Yes or No	Date Funds Are Available

Please include evidence of your organization’s efforts to obtain funding (or donations) from other sources for the proposed project. Include letters of commitment as well as application cover letters, approval letters, and rejection letters.

All proposals are required by policy of the Foundation to provide some matching funds:

- a. Non-profit agencies and local government agencies in Crockett (P-1 Advisory Committee, Crockett-Carquinez Fire Protection District, Community Services District, John Swett Unified School District and Crockett Library) must have at least a 10% match from other sources. Consideration will be given to verifiable in-kind services, sweat equity, and material donations to the project in lieu of cash;
- b. Government agencies (except as noted above) must have at least a 50% match of the proposal from other sources.

**Project Budget**

Please attach a realistic line item estimate of all project expenses (not only those covered by the requested grant). If the project costs exceed the grant request, indicate how grant dollars will be spent.

Signature: \_\_\_\_\_  
Board Chair/ or Designee

Signature: \_\_\_\_\_  
Administrative Director