

# The Foundation Roundtable of Santa Barbara County

## 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 from selected foundations, on the Nonprofit Support Center's (NSC) website [www.NSCSB.org](http://www.NSCSB.org), or on diskette, CD or hard copy from the NSC office. Training on proposal preparation and this specific application is offered by the Nonprofit Support Center in: Santa Barbara: 681-1040; Santa Maria: 928-2503; Lompoc: 737-1557.

### 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.**

### Participating Funders List

The following foundations accept The Foundation Roundtable Common Grant Application:

Crawford Idema Family Foundation  
Fund for Santa Barbara, [www.fundforsantabarbara.org](http://www.fundforsantabarbara.org)  
Hutton Foundation, [www.huttonfoundation.org](http://www.huttonfoundation.org)  
Ann Jackson Family Foundation  
Karuna Foundation, [www.karunafoundation.org](http://www.karunafoundation.org)  
The Levy Family Foundation  
Wendy P. McCaw Foundation  
The McCune Foundation, [www.mccunefoundation.org](http://www.mccunefoundation.org)

Samuel B. & Margaret C. Mosher Foundation  
Ridley-Tree Foundation  
Santa Barbara Foundation, [www.sbfoundation.org](http://www.sbfoundation.org)  
The Towbes Foundation, [bross@towbes.com](mailto:bross@towbes.com)  
The Valley Foundation, [syvf@syv.com](mailto:syvf@syv.com)  
Wharton Foundation  
Zannon Family Foundation, [zannon@cox.net](mailto:zannon@cox.net)

**La versión en español está disponible de parte de Fund for Santa Barbara, 962-9164.** No todas las fundaciones aceptan esta versión; llámaselas primero. The Spanish language version is available from the Fund for Santa Barbara, 962-9164. Not all foundations accept this version. Call foundations first.

# 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 NSC's 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 – also available in an Excel version
- Organization Financial Summary – also available in an Excel version
- Organization Balance Sheet – also available in an Excel version
- A Copy of Your IRS Final Determination 501(c)(3) Letter

If your organization does not 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 will require additional information or will have specific submission instructions. **You must 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  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:

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

\_\_\_\_\_  
Name & Title of Lead Staff Member (or 2<sup>nd</sup> Representative)      Signature      Date

# The Foundation Roundtable: Common Grant Application

## Proposal Narrative

**Directions:** Limit your Proposal Narrative to **four (4) pages maximum, with .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.

### **Background (One page or less)**

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?

### **Funding Request**

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?



# The Foundation Roundtable: Common Grant Application

## 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: \_\_\_\_\_

### **INCOME**

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

Source	Total Project (\$)	Pending (\$)	Secured (\$)	Notes
<b>TOTAL INCOME</b>				

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
<b>TOTAL EXPENSES</b>			

# 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 (\$ [            ] (date))	Projected Annual Budget (\$)	YTD Actual (\$) [            ] (date)
<b>TOTAL INCOME</b>			

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 (\$ [            ] (date))	Annual Budget (\$)	YTD Actual (\$) [            ] (date)
<b>TOTAL EXPENSE</b>			
<b>NET PROFIT OR LOSS</b>			

Total Capital Expenses	\$	\$	\$
------------------------	----	----	----

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

Notes: \_\_\_\_\_

# The Foundation Roundtable: Common Grant Application

## Organization Balance Sheet Summary

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

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