

IMPACT 100 – Owensboro Common \$100,000 Grant Application

Section One

Focus area designation for your application (select one):

☐ Culture ☐ Education ☐ Environment & Recreation ☐ Family ☐ Health & Wellness

Organization Data

Applicant Organization (Legal Name): _____

Doing Business As: _____

Previous Name, if changed: _____

Street Address: _____

City: _____ State: _____ Zip: _____ County: _____

Email: _____ Web Site: _____

Phone: _____ Fax: _____

IRS Name [as listed on 501(c)(3) letter]: _____

IRS Letter Date: _____ Tax Exempt ID Number (EIN): _____

Executive Director: _____ Direct Phone: _____

Organization's Budgeted Expenses for Current Year: _____ Endowment Size: _____

Organization's Major Funding Sources: _____

Organization's Affiliation and/or Accreditation Body [check all that apply]

☐ United Way ☐ Fine Arts Fund ☐ Better Business Bureau

☐ Chapter of national or regional organization (specify): _____

☐ Other (Specify): _____

Request Data

Program/Project Title: _____

Total Budget for this Program/Project _____ **NOTE:** The amount of this request is \$100,000

Provide Name of Proposal **Contact Person** IF other than Executive Director:

Name: _____ Title: _____

Phone: _____ Fax: _____

Email: _____

Community/Counties to be served by this Program/Project: _____

Brief demographic description of population served by this Program/Project: _____

Potential Number to be served by this Program/Project: _____

Type of Grant Request [check all that apply]:

☐ Capital Expenditures ☐ Programming ☐ Endowment
☐ Research & Development ☐ Collaborative Project/Program

[Both signatures required unless otherwise specified by funder]

Signature of Executive Director: _____ Date: _____

Signature of Board President: _____ Date: _____

The narratives for **Sections Two** through **Six** should not exceed five pages. Responses must be typed; preferably single-spaced, single-sided and use a minimum of 12-point type. It will help clarify your narrative if you separate the sections with centered headings.

Section Two – Profile of Organization

[This should be a brief profile, preferably less than one page.]

1. Give a brief summary of organization's history.
 2. Share the organization's vision/mission.
 3. Give a brief description of current programs/projects and activities.
 4. Describe organization's constituency and geographic region of service.
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Section Three – Statement of Need

1. Provide a statement of community need the proposed program/project is attempting to meet.
 2. Give evidence of that need.
 3. Share how this proposed program/project could complement or enhance the work/efforts of other organizations to respond to the needs you have identified.
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Section Four – Proposed Program/Project Description

1. Describe the proposed program/project, including at least:
 - a. Goals or objectives of the proposal
 - b. Activities to accomplish the program/project *[NOTE: Indicate whether this is a new or an expanded or modified program/project; if expanded or modified, identify how it increases your organization's outreach.]*
 - c. Timetable for implementation
 2. What is the life expectancy of the proposed program/project?
 3. Explain why your organization is especially qualified and appropriate to address this need or benefit.
 4. Describe the impact of this program/project on the community; include at least:
 - a. An estimate of the numbers of persons who could benefit
 - b. Outline of the geographic areas served
 - c. Benefit to the Greater Owensboro area
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Section Five – Evaluation/Assessment

1. How will you define and measure the success/impact of your program/project?
2. How will you involve those your program/project serves/benefits in the assessment?
3. How will you use and share the results of your assessments?

Section Six – Program/Project Funding Plans

1. List other funders to which **this current** proposal has been and will be submitted. For each funder, indicate amount requested and status of request, e.g., request will be submitted, is pending, was funded or was declined. If funded, specify amount of grant.
 2. What other funding do you anticipate for this current proposal? If any, describe. For example:
 - a. Earned revenue
 - b. In-kind support
 - c. Special events
 - d. Fundraisers
 - e. Other
 3. If this will be an ongoing program/project, describe plans and specific sources for future/long-term funding and sources of sustainability.
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Section Seven – Required Financial Attachments

*[Items 1 – 5 **must** each be submitted and clearly identified.]*

1. Submit Statement of Revenue/Support and Expenses for your organization's most recently completed fiscal/calendar year *[see attached example, Form A]*.
2. Submit Balance Sheet for most recently completed fiscal year.
3. Provide your most recent, complete audit including auditor's notes. If the organization does not have an audit done, then send the most recent 990.
4. Send the budget for the current fiscal/calendar year including a column showing the organization's year-to-date status *[see attached example, Form B]*.
5. Submit the **Proposed Program/Project Budget** for your **entire** project *[see attached examples, Form C **or** Form D for Capital Requests]*. **IF** your project's budget is over \$100,000, clearly indicate which portions will be funded by the IMPACT 100 Grant. Also specifically indicate how you will fund the balance of the project.

NOTE: Complete Item 6 if there will be ongoing expenses associated with your project which will increase the organization's operating budget by 20% or more, or if this is a new organization.

6. Provide pro forma project budgets for the next three years. The purpose of the pro forma is to show how the organization plans to sustain the project.

NOTE: If your existing financials are in a similar form as the attached example forms, they may be submitted instead.

Section Eight – Required Non-Financial Attachments

1. Include a copy of your IRS letter of determination 501(c)(3), or if such a letter does not exist, see specific funder requirements.
2. Provide names, affiliations and demographics of board members.
3. List key staff members and qualifications, or provide an organizational chart.
4. Include one or more examples of the following:
 - a. Annual reports
 - b. Organizational brochure
 - c. Sample newsletter
 - d. Program
5. Add letters of commitment from collaborating or supportive organizations, if appropriate.

The Common Grant Application is a collaborative effort of funders, non-profit organizations and consultants working to build the performance capability of not-for-profit and community organizations.

FORM A
STATEMENT OF REVENUE/SUPPORT and EXPENSE for MOST RECENTLY
COMPLETED FISCAL YEAR

Name of Organization: _____

Time Period: _____

REVENUE/SUPPORT	
Corporate grants	
Foundation grants	
Government grants/contracts/per diem (identify)	
Contributions	
United Way	
Other federated campaigns (identify)	
Fine Arts Funds	
Membership dues	
Special events, fundraisers	
Sponsorships	
Admissions	
Sales, rent	
Revenue, tuition	
Investment income	
Interest, dividends	
Other	
Total Revenue/Support	
EXPENSES	
Salaries	
Employee benefits, taxes	
Professional fees	
Equipment, supplies, materials	
Telephone, utilities	
Postage, mailing	
Occupancy	
Insurance	
Training, staff development	
Travel	
Conferences	
Evaluations	
Other	
Total Expenses	
Revenue less Expenses	

If expenses exceeded revenues/support, please explain. Accompanying narrative welcome if additional explanation is warranted.

FORM B
TOTAL ORGANIZATION BUDGET FOR CURRENT FISCAL YEAR

Name of Organization: _____

Time Period: _____

REVENUE/SUPPORT	Budget for Year	Year-to-Date (specify date _____)
Corporate grants		
Foundation grants		
Gov't grants/contracts/per diem (identify)		
Contributions		
United Way		
Other federated campaigns (identify)		
Fine Arts Fund		
Membership dues		
Special events, fundraisers		
Sponsorships		
Admissions		
Sales, rent		
Revenue, tuition		
Investment income		
Interest, dividends		
Other		
Total Revenue/Support		
EXPENSES		
Salaries		
Employee benefits, taxes		
Professional fees		
Equipment, supplies, materials		
Telephone, utilities		
Postage, mailing		
Occupancy		
Insurance		
Training, staff development		
Travel		
Conferences		
Evaluations		
Other		
Total Expenses		
Revenue less Expenses		

If expenses exceed revenues/support, please explain how difference will be offset.

FORM C
PROGRAM REQUEST BUDGET

Name of Organization: _____

Time Period: _____

<i>Items typical for operating a program:</i>	
REVENUES/SUPPORT	BUDGET
Corporate grants	
Foundation grants	
Gov't. grants/contracts/per diem (identify)	
Contributions	
United Way	
Other federated campaigns (identify)	
Fine Arts Funds	
Membership dues	
Special events, fundraisers	
Sponsorships	
Admissions	
Sales, rent	
Revenue, tuition	
Investment income	
Interest, dividends	
Other	
Total Revenue Support	
EXPENSES	
Salaries	
Employee benefits, taxes	
Professional fees	
Equipment, supplies, materials	
Telephone, utilities	
Postage, mailing	
Occupancy	
Insurance	
Training, staff development	
Travel	
Conferences	
Evaluations	
Other	
Total Expenses	
Revenue less Expenses	

If expenses exceed revenues/support, please explain how difference will be offset. Accompanying narrative welcome if additional explanation is warranted; for example, an explanation of in-kind gifts.

FORM D
CAPITAL REQUEST BUDGET

Name of Organization: _____

Time Period: _____

<i>Items typical for capital project:</i>	
REVENUES/SUPPORT	BUDGET
Corporate grants	
Foundation grants	
Gov't. grants/contracts/per diem (identify)	
Contributions	
United Way	
Other federated campaigns (identify)	
Fine Arts Funds	
Membership dues	
Special events, fundraisers	
Sponsorships	
Admissions	
Sales, rent	
Revenue, tuition	
Investment income	
Interest, dividends	
Loans	
Tax credits	
Other	
Total Revenue Support	
EXPENSES	
Purchases	
Installations	
Site preparations	
Furnishings	
Professional fees	
Contingency	
Other	
Total Expenses	
Revenue less Expenses	

**If expenses exceed revenues/support, please explain how difference will be offset.
Accompanying narrative welcome if additional explanation is warranted; for example,
an explanation of in-kind gifts.**

TERMS OF GRANT AGREEMENT FOR IMPACT 100

1. Applicant agrees that any grant received from **IMPACT 100** will be expended for the explicit purposes described in the grant proposal. In the event grant monies are to be allocated for any other purpose, agreement must be obtained from **IMPACT 100**.
2. If a grant is received, applicant agrees to credit **IMPACT 100** in the manner identified by **IMPACT 100** in any publications (including annual reports, newsletters) press releases, brochures, videotapes, and other publicity or public relations materials and presentations.
3. Applicant agrees, following expenditure of any grant received, to return a follow-up report to **IMPACT 100**. An itemized budget is part of the report.

I, the undersigned, have read and understand the Terms of Grant Agreement, and, should a grant be received, agree to follow its terms and conditions.

Applicant Organization

By

Executive Director

Date

SUBMIT FIVE complete copies of the application, including all attachments **and** one flash drive containing an electronic copy of the application, to the following address by **Wednesday, June 1, 2016 at 5 p.m.:**

Mary Embry, Edward Jones Investments
3811 State Route 54, Suite 104
Owensboro, KY 42303
mary.embry@edwardjones.com

Eligibility and Grant Guidelines

Eligibility

To qualify for an IMPACT 100 Owensboro grant, an organization must be recognized as a tax-exempt organization under Section 501 (c) (3) of the Internal Revenue Service Code.

We accept grant applications that address issues in these focus areas:

CULTURE ~ EDUCATION ~ ENVIRONMENT & RECREATION ~ FAMILY ~
HEALTH & WELLNESS

The organization:

- Must be located in the Greater Owensboro area, or may be the recognized local chapter of a state or national organization serving this region.
- Must submit a proposal for a project or program that is implemented in or serves residents of the Greater Owensboro area.
- Cannot discriminate based on religion, ethnicity or gender.
- Must demonstrate sustainability and community support, which may be evidenced by public donations, volunteerism, and utilization of the organization's facilities and/or programming.
- Must wait 3 years to reapply, if it is a past recipient of an IMPACT 100 Owensboro Grant (individual recipient or collaborative partner).
- May reapply without any wait if it is a recipient of an IMPACT 100 Owensboro Residual Grant.

As we continue to grow and evolve, IMPACT 100 Owensboro reserves the right to change its eligibility criteria.

Grant Guidelines

IMPACT 100 Owensboro has identified the following focus areas for its grants. Applicants must self-assign their proposals to one of the following focus areas:

- **Culture:** Initiatives, program expansion or modifications, and/or collaborative efforts that cultivate, develop, and enhance the cultural, historical, and artistic climate of the Greater Owensboro area.
- **Education:** Initiatives, program expansion or modifications, and/or collaborative efforts that further educational undertakings or improve access to education for children and/or adults in the Greater Owensboro area.
- **Environment and Recreation:** Initiatives, program expansion or modifications, and/or collaborative efforts that enhance, beautify, protect, or restore the environment in and surrounding the Greater Owensboro area and/or expand, enrich, or provide access to outdoor, recreational, or sports/exercise programs.
- **Family:** Initiatives, program expansion or modifications, and/or collaborative efforts that strengthen and enhance the lives of children and families living in the Greater Owensboro area.
- **Health & Wellness:** Initiatives, program expansion or modifications, and/or collaborative efforts that improve the mental and/or physical well-being of people living in the Greater Owensboro area.

Application Guidelines

- An agency may submit only one grant per year.
- A proposal must be for the full \$100,000 IMPACT 100 Owensboro grant amount. The project's total budget may exceed \$100,000; if so, the grant application must indicate how the remaining funds will be secured.
- An organization must plan to expend the \$100,000 grant within 24 months of award. Residual funds must be spent within 12 months of the award.
- The project may be a new program, an expansion or modification of an existing program, or be a collaborative effort of several agencies
- Any portion of the grant funds used for endowment purposes by the Grantee shall remain in principal for at least six years.
- The grant recipients must sign a contract with IMPACT 100 Owensboro which spells out the agency's responsibilities for disbursement of funds.

IMPACT 100 Owensboro accepts applications that are:

- Programming (new or expanding activities that support agency's mission)
- Capital Expenditures
- Endowment Funding
- Research and Development Oriented
- Collaborative Project/Program [*combined efforts of more than one **non-profit** agency*]

IMPACT 100 Owensboro will not accept applications that are for:

- General operating expenses or overhead (i.e. if your agency provides books, the IMPACT 100 Owensboro grant cannot be used for books; salaries for existing staff; utilities; etc.)
- Partisan, legislative, political, or religious activities
- Travel
- Repayment of previously incurred debt

Grant Submission Guidelines

- Download the IMPACT 100 Owensboro Grant Application. Elements of the form, Section 1 and the financial forms for Section 7, are Microsoft Word tables and could be completed electronically.
- Designate a focus area for your application (select one)
- **Five** complete copies of the application, including all attachments **and** one flash drive, containing an electronic copy of the application, must be delivered to the following address by **Wednesday, June 1, 2016 at 5 p.m.:**

Mary Embry, Edward Jones Investments
3811 State Route 54, Suite 104
Owensboro, KY 42303
mary.embry@edwardjones.com