

How to Apply for a Grant

As a community foundation, the San Angelo Area Foundation does not limit its discretionary grant making to a particular field or area of interest. Rather, it seeks to support the entire range of human needs in the San Angelo area. This information addresses discretionary grants which are made from the earnings of the *Unrestricted* Funds and the *Field of Service* Funds of the Foundation.

Because the Foundations' resources are limited, the Directors are required to make judgments based on relative need and potential impact. **Preference is given** to applications that:

- Enable charitable agencies to perform essential services that reduce costs, increase efficiency, become more self-sufficient, and strengthen internal management capabilities;
- Demonstrate strong volunteer involvement and broad community support and significantly strengthen the capacity of existing institutions to reach a broader segment of the community;
- Are developed in consultation with other agencies and planning groups and those that promote coordination, cooperation and sharing among organizations and eliminate duplication of services.

Each year the Foundation will receive more worthy requests than can be supported. Therefore, the Directors normally **will not** consider:

- A proposal that has been declined within the last 12 months unless there has been a significant change;
- A proposal from an organization that has not submitted a full financial report of a previous grant.

Grant Making Policies

In general, the Foundation will not grant funds to the following types of organizations or projects:

- Political lobbying or legislative activities.
- Establishment or enhancement of endowments.
- Debt retirement, deficit financing, reduction of an operating deficit or liquidation of debt, or replenishment of resources used to pay for such purposes.
- Courtesy advertising, benefit tickets, telephone solicitations. General solicitation letters will not be acknowledged.

- Umbrella funding organizations for distribution of the requested funds at their own discretion.
- Organizations located outside the [San Angelo area](#).

Eligibility Requirements

To be eligible for funding the applicant organization must:

- Be a 501(c)(3) nonprofit organization as defined in Section 509(a)(1) and/or Section 170(b)(1)(a)(vi) or Section 509(a)(2) of the Internal Revenue Code, or affiliated with a nonprofit organization, or a governmental unit. Individuals are not eligible applicants.
- Use grant funds within and for the benefit of residents and communities of the 17 counties of the [San Angelo Area](#).

Grant Making Funding Cycles

The Foundation will have one grant funding cycle for discretionary grants each year.

- Executive Summary must be submitted by September 1st
- Notification of invitation to submit a formal proposal will be completed by September 25th
- If a grant seeker is invited to submit a formal proposal, it will be due by October 10th, with awards occurring by December 1 of each year.

Executive Summary

Due to limited funds available for grant making purposes and the desire of the Foundation not to waste the valuable time of grant seekers, the Grants Committee of the Foundation will review executive summaries of grant requests each funding cycle as outlined above. Grant seekers should prepare a one to two page executive summary of their grant request, including scope of the grant, amount of grant sought, time lines, and other funding solicited and or received. After the Grants Committee has reviewed the executive summaries of grant proposals, they will then invite potential grant seekers to submit a formal proposal as outlined below. The invitation to submit a formal proposal does not indicate that a grant will be awarded. Conversely, if an invitation is not extended to a grant seeker, it is not to be intended as a reflection on the scope of a project. It could merely be due to limited funds available verses the amount of the grant requested. Executive Summaries can be mailed to the address below, or can be e-mailed to infosaaaf@saafound.org.

Invitation to submit a formal grant proposal

If an invitation to submit a formal proposal is extended, please provide the following information. In general, form is less important than its content. Typically, a formal proposal should not exceed eight pages (not including attachments)

Cover Letter

A letter from the chief administrator and chief volunteer officer authorizing the grant with the organization's full board approval and support. The letter should include the name and telephone number of the person the Foundation can contact regarding specific questions about the grant application if that person is not the chief administrator.

Summary of Request

Clearly and concisely summarize the request. This may simply be the prior Executive Summary. Tell the major features of the project, what is to be accomplished, how much it will cost, and how long it will take. State the amount of the request and identify any funds already committed and funds requested but not committed.

Background of Organization

Describe the organization's general purpose, clients served, and a summary of the activities and services provided. Describe significant accomplishments of the organization and staff. List other organizations that serve the same clients and explain how these programs are alike and different. Explain how services are coordinated between organizations and/or describe any cooperative projects that may exist.

Problem Definition

Define the problem that will be addressed or solved that makes the project necessary. Justify or document the problem with data or research. Explain how this problem fits within the organization's mission.

Objectives

The objectives relate to the problem described and what is going to change. Objectives tell who is going to do what, when, for how many, and how success will be measured.

Methods for Achieving Objectives

Describe the procedure by which each objective will be achieved, how the project will be administered and implemented, and who will be responsible. State why this method was chosen to address the problem rather than other alternatives. Prepare a timeline that reflects planning, implementation, and completion. Explain why this organization is the best suited to solve this problem.

Evaluation and Measurement

Explain your plans to evaluate the impact or success of the project. Describe a method by which the organization will measure the accomplishments of the objectives, the content of reports and dates reports will be submitted to the Foundation, including a final financial report.

Future and/or Other Funding

Describe how the project will be funded beyond the grant period. Construction projects must include an operating budget that reflects any increase or decrease, and how increases will be funded. If the project requires additional funding, include letters of commitment or a development plan outlining how additional funds will be raised.

Project Budget and Narrative

An itemized budget includes the source and amount of committed funds, amount requested, amounts to be secured from other sources, and expenses by line item. The budget narrative is a description of the expense items and a clarification as to which funds are committed or pledged, the status of other requested funds, and a timetable for all funds to be committed.

Supporting Documentation and Copies

One copy of the following will also need to be provided:

- A copy of the latest IRS form 990;
- A copy of the latest IRS Exemption letter;
- A listing of the board of directors of the organization and their financial support of the organization
- A copy of the last four board meeting minutes
- A copy of the last year's financial statements
- Interim financial statements which include a balance sheet and income and expenses compared to budget from the time of the last audit to present
- If the organization has annual income and or expenses exceeding \$500,000, then an audited financial statement will be required

Application will be submitted in writing to:

Grant Applications
San Angelo Area Foundation
2201 Sherwood Way, Suite 205
San Angelo, Texas 76901

Administration of Grants

If a grant seeker is invited to submit a formal request, a member of the Foundation staff and or a member of the grants committee should be invited for a site visit of the organization requesting the grant.

If a grant is awarded to a grant seeker, the grant seeker will be required to submit documentation to the Foundation within six to twelve months of funding that the funds were expended in accordance with the grant request approval.

Grants Committee Responsibilities

The Board of Directors of the Foundation will utilize a grants committee to review grant proposals and make recommendations to the Board of Directors for grant awards. The grants committee may from time to time create other committees to assist the grants committee in evaluating grant proposals for various funds. This committee would be appointed by the grants committee chairperson in consultation with the Board of Directors and would serve at the discretion of the grants committee. This committee would have the same responsibility of the grants committee in reviewing grant requests and would make recommendations to the grants committee as to grant awards. All grant awards recommended by the grants committee require the approval of the entire Board of Directors of the Foundation.