

BARTLESVILLE COMMUNITY FOUNDATION GRANT APPLICATION FORM

Origin and Purpose: Bartlesville Community Foundation was founded by community leaders in 1999 as a means of providing a simple way to do good works. The Foundation partners with donors to fund initiatives that improve the quality of life in the Bartlesville area.

Restriction: The Foundation generally makes grants only to non-profit organizations with 501(c) (3) status and qualified governmental agencies, though the charitable program/initiative coordinated by a non-tax-exempt entity will also be considered. Grants are not awarded in the following areas: annual fund raising, organizational endowment funds, deficit financing, grants to individuals, or for sectarian purposes. Challenge/matching grants may be initiated by the Foundation.

Procedures: The availability of grant awards is published by Bartlesville Community Foundation. Grant cycles may focus on a particular field of emphasis or may allow for general applications. Grant amounts will vary, but generally do not exceed \$5,000. Extraordinary amounts may be given if an exceptional need is seen by the Foundation. The Foundation rarely awards multi-year grants.

When a grant check is cashed, the organization is obligated to use the dollars for the purpose given in the application. Grant recipients are required to file a written report describing the use of the funds after the program/initiative is completed or nine months after the grant has been received. Grant reporting instructions are provided to all grant recipients.

Application information: Requests for funding must include all information requested in the grant application form provided by Bartlesville Community Foundation. Deadlines for submission will be published with each grant cycle.

Bartlesville Community Foundation is a public community foundation and recognizes the need for flexibility in problem solving. In evaluating applications, Bartlesville Community Foundation gives consideration to the following factors:

- Does the program/initiative serve the community of Bartlesville, Oklahoma or its surrounding areas?
- Does the program/initiative address a priority community need? What are its nature and scope and the number of people served by this program/initiative?
- Will the program/initiative have a positive effect on the community?
- Does the program/initiative duplicate any other community service?
- Will the program/initiative have a significant impact on the need, what outcome will be achieved and how will it be measured?
- Does the program/initiative have a sound financial plan?
- Will this grant constitute matching funds?
- After this program/initiative is completed, how will funding continue? If not funded, what is the effect?
- Does the program/initiative have a broad base of community support such as volunteer involvement, neighborhood participation, and collaboration with other organizations?

Bartlesville Community Foundation
GRANT APPLICATION

Bartlesville Community Foundation is accepting applications for its 2008-09 Spring Grant cycle. **Applications must be submitted no later than February 27, 2009**. Grants will be awarded no later than May 15, 2009.

Seven copies of the grant application, including the organization's supporting documents, as required, should be submitted. Each copy should be stapled together. Please no binders or report covers.

Applications must be completed in full, providing information specific to the following twenty-four (24) items. Incomplete applications will not be considered.

1. Provide the name of your organization, your federal ID number (EIN), and the date you were established.
2. Are you a 501(c)(3) tax-exempt organization? Include your tax exempt letter.
3. Are you a unit of a political subdivision?
4. If your organization is not a 501(c)(3) tax-exempt organization or a political subdivision, describe the charitable aspects of the program/initiative, as defined by Treasury Regulation 1.501(c) (see attached).
5. What is the title of the program/initiative for which you are applying?
6. Is the program/initiative new? If so, what prompts you to recommend the establishment of the program/initiative?
7. Is this an enhancement/expansion/continuation of a program/initiative? Please describe.
8. What amount are you requesting?
9. What is the total cost of the program/initiative?
10. Provide a description of program/initiative.
11. What key measurements will be used to gauge the impact of the program/initiative?

12. To what degree will the program/initiative, if successful, eliminate or diminish a critical community need?
13. Categorize the program/initiative as one of the following: Health, Human Services, Community Development, Cultural, Educational, Workforce Development, Childcare, Land Use and Protection, or Other (describe).
14. Identify population served as one of the following: General Public, Infant/Babies, Children/Youth, Adults or Elderly.
15. What is the amount of organization's annual operating budget? Include a copy of your current financials, your year-end financials for your previous fiscal year, and a copy of your latest audit.
16. What are the major funding sources for the program/organization?
17. What is the organization's fiscal year?
18. List your board of directors/trustees.
19. List your key staff and/or volunteers involved in the program/initiative.
20. Provide additional, relevant information about your organization and your mission statement.
21. Provide a contact person's name, title, email and phone number.
22. Provide the organization's address and phone number.

Excerpts from Internal Revenue Service, Treasury § 1.501(c)(3)-1

(d) *Exempt purposes*—(1) *In general.* (i)

An organization may be exempt as an organization described in section 501(c)(3) if it is organized and operated exclusively for one or more of the following purposes:

- (a) Religious,
- (b) Charitable,
- (c) Scientific,
- (d) Testing for public safety,
- (e) Literary,
- (f) Educational, or
- (g) Prevention of cruelty to children or animals.

(2) *Charitable defined.* The term *charitable* is used in section 501(c)(3) in its generally accepted legal sense and is, therefore, not to be construed as limited by the separate enumeration in section 501(c)(3) of other tax-exempt purposes which may fall within the broad outlines of *charity* as developed by judicial decisions. Such term includes Relief of the poor and distressed or of the underprivileged; advancement of religion; advancement of education or science; erection or maintenance of public buildings, monuments, or works; lessening of the burdens of Government; and promotion of social welfare by organizations designed to accomplish any of the above purposes, or (i) to lessen neighborhood tensions; (ii) to eliminate prejudice and discrimination; (iii) to defend human and civil rights secured by law; or (iv) to combat community deterioration and juvenile delinquency.