



GRANT GUIDELINES & INSTRUCTIONS

Please read these guidelines carefully, as they govern our Grant Making process!

Thank you for your interest in the Bryan Area Foundation (Foundation). The following information will assist you in determining whether to apply to the Foundation for funding and explain how to proceed if you are eligible to do so. Please review these materials carefully. While the Foundation would like to support all the important work being carried out by Williams County's not-for-profit organizations, its financial resources are limited. The information provided on the application helps the Foundation make sound decisions based on its mission and the Foundation's goal to impact its community.

WHO WE FUND

The Foundation makes grants to tax-exempt 501(c)(3) organizations operating or proposing to operate programs primarily for the benefit of Williams County residents.

FINANCIAL SUPPORT PRIORITIES

On June 12, 2008 the Foundation Trustees adopted its Community Support and Facilitation Principles based upon feedback and consultation with community groups. As a result the Foundation's Financial Support Priorities are as follows:

- The Foundation prefers projects which benefit youth activities, the arts, or which create a long-term physical community resource.
- The Foundation prefers not to make grants for operating expenses.
- The Foundation does not generally make grants to religious organizations. Further, it cannot support projects that promote any specific religion or belief structure; or which require specific religious counseling as a part of services.
- The Foundation will aggressively use matching grants.
- All organizations submitting grant requests must meet with the Foundation's President/CEO at least 30 days prior to submitting a grant.
- The Foundation recognizes strong organizations require strong boards; therefore, the Bryan Area Foundation will make available periodic board training opportunities facilitated by regionally and nationally recognized experts in the field.
- Applicants must submit their form 990, 990-EZ, or 990-N to show IRS compliance.
- The Bryan Area Foundation's involvement in social services will be supportive (facilitative) rather than direct (monetary) and the Foundation can serve as a resource to facilitate compassion, efficiency, and responsibility in the distribution of social services to the community.
 - The Foundation believes that federal, state or local governments have the resources and the primary responsibility for advancing issues involving healthcare, education and economic development.
 - The Foundation can, and will, play a role in assuring mutuality of interest, efficiency, and the elimination of duplication of services in these sectors.

HOW TO APPLY

Completed *typewritten* application forms should be delivered to the Foundation's office at 110 S. Walnut Street, Bryan, OH 43506. The Foundation's mailing address is PO Box 651, Bryan, OH 43506. Applications cannot be submitted online.

Applications that do not contain all of the requested information may not be considered. If information requested is not available an explanation is required.

In addition, Foundation board members may contact you to arrange a conference to discuss the application. This may be in the form of a site visit, telephone conversation, or a meeting. All proposals will be reviewed by Foundation staff for completeness and to assure that they fit within the Foundation's general guidelines. If, upon review, the application is considered incomplete for any reason, the application will not meet the submission requirements until the application is considered complete by the Foundation. Deadline extensions will not be granted so please submit a grant application well in advance of the deadline.

Once a grant is received, the Foundation requires that the funds be expended within 12 months from the award date. **Failure to use funds for the purpose designated will result in obligation to repay grant money.** If it appears implementation of the project or program will be delayed, the grant recipient must submit a written explanation that contains a request to encumber the funds for the following calendar/fiscal year. The Foundation's Board of Trustees will determine if the funds may be held over or if the applicant must reapply in a subsequent grant cycle. A Final Grant Report request will be mailed to the grant recipient at the end of the funded project to assess the success and the effectiveness of the use of the grant funds.

PROPOSAL REQUIREMENTS

- **Download and read grant guidelines and instructions**
- **Meeting with President/CEO at least 30 days prior to grant deadline**
- **Completed TYPED application. Handwritten applications will not be accepted**
- **1 Original and 10 copies (11 total)**
- **Requested Signatures**
- **A copy of IRS determination letter showing 501(c)(3) tax exempt status**
- **Most recent annual financial statement (preferably audited)**
- **Copy of most recent 990, 990-EZ or 990-N as submitted to the IRS**
- **Organizations current annual operating budget detailing income and expenses**
- **Most recent annual report, if available**
- **Purchase estimates and/or project bids, if applicable**

WHEN TO APPLY

The Foundation Board considers grants four times each year – in September, December, March and June. Completed applications must be received at the Foundation office by **12:00 PM (NOON)** on:

September 30	for consideration in December
December 29	for consideration in March
March 31	for consideration in June
June 30	for consideration in September

If the deadline date falls on a weekend or holiday, the deadline for applications will be the first workday PRIOR to the deadline (e.g. Friday, if the deadline falls on a weekend).

The Bryan Area Foundation reserves the right to revoke any grant if the implemented project does not comply with our guidelines or fails to reflect the application that was submitted.

Preparing a Grant Proposal for the Bryan Area Foundation

General

- **Download and read grant guidelines and instructions.**
- **Contact the Foundation.** It is required that all applicants schedule a meeting with the Bryan Area Foundation President/CEO at least 30 days in advance of the grant deadline.
- **Read instructions carefully.** Be sure to include all requested information. Grant committee members note your ability/inability to follow directions.
- **Submit correct number of copies.** The instructions ask for 1 original and 10 copies of the proposal, so be sure to submit 11 copies. The Foundation asks for a specific number of copies based on the number of committee members.

Content

- **Applications should be brief and to the point.** Avoid using technical or professional jargon that might be unfamiliar to committee members.
- **State/summarize proposed project immediately.** Do not require the grant committee members to read several paragraphs (or worse, pages) before you state the purpose of the grant proposal.
- **Demonstrate that you have the support of others.** Include other foundations, corporations, and individuals who have already donated or will be working with you to make the project successful.

Financial Information

- **Fill out all financial information in the application.** This is a specific format required of all applicants. If a line item does not apply to your organization, then write N/A.
- **Include your organization's most recently completed financial statements.**
- **Attach detailed project estimates or bids.** The grant committee needs to know how you determined the project cost. Please attach professional estimates or quotes. These documents demonstrate that you have done your homework and have an accurate sense of what the project will cost.
- **Ask for a specific amount in your request.**
- **Ask for the right amount.** Determine the average range of gifts the Foundation has made in the past. Research the amount specific to your type of request. Grant information can be found at www.bryanareafoundation.org.

Attachments

- **Acknowledge missing information.** If you do not submit one of the requested attachments, state why you have not included the information. The grant committee requests all information for a reason.
- **Label all attachments.** Attachments should be easy to identify. It is also helpful to arrange attachments in the order addressed in the application.

Presentation

- **Submit a reader-friendly proposal.** Committee members must read numerous grant proposals, so keep font size reasonable (10 to 12 point). Other ways to make your proposal reader-friendly include:
 1. Do not use all uppercase letters
 2. Use paragraph format
 3. Use a font that is easy to read (Times New Roman, Universe, Arial).
- **Staple each copy of the proposal.** If the proposal is too thick to staple, use binder clips.
- **DO NOT** put copies of the proposal in folders, binders or report covers. Foundation staff will remove any folders, or covers etc. and discard them.

Finally

- **Ask questions.** It is better to call the Foundation (419-633-1156) with questions than to submit inadequate or incorrect information. Foundation staff is available to answer questions you may have regarding the grant process.