

# 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 on the Santa Barbara Foundation web site: [www.sbfoundation.org/foundationroundtable/](http://www.sbfoundation.org/foundationroundtable/) . **The McCune Foundation version is at [www.mccunefoundation.org](http://www.mccunefoundation.org).**

This document has been formatted so that information can be inputted directly. Please save this document to your computer so that you will not lose your information. Please do not use commas to separate thousands when entering numerical data. Once you have completed the grant application, you can either email it directly to the organization or print out and send it through the mail.

**For a list of other funders that accept this application, visit**  
[www.sbfoundation.org/foundationroundtable](http://www.sbfoundation.org/foundationroundtable)

**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.**

# The Foundation Roundtable: Common Grant Application

## Application Checklist

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
- Organization Financial Summary
- Organization Balance Sheet
- Strategy Chart(s) for program support applications

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.

## 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.)

Tax I.D. Number: \_\_\_\_\_

501(c)(3) Granted

Other: \_\_\_\_\_

Other: \_\_\_\_\_

**Type of Request:** *Indicate all that apply*

General Support

Program Support

Multi-Year

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:

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

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

# Proposal Narrative

◆ ◆ ◆ These questions are *specific to the McCune Foundation*. Use questions in the application found at [www.sbfoundation.org/foundationroundtable/](http://www.sbfoundation.org/foundationroundtable/) if applying to other funders. ◆ ◆ ◆

**Directions:** Limit your Proposal Narrative to **four (4) pages maximum, with 0.8 inch margins, 12 point font or larger for questions 1 to 5**. Fill in each section using the specific questions below as boldface headings with your responses in normal text.

## **1. Background & Mission** (One page or less)

Briefly describe the mission and history of your organization. Include major accomplishments.

## **2. Statement of Need and Proposed Work**

Describe the problem(s) you are addressing through your work, the systemic or social change you seek, and how your proposed work will impact the issue. How are your grassroots members/constituency/leaders affected by the issues? Be sure to discuss your approach to community organizing and strategies you will use; short- and long-term objectives; and how you communicate with constituents and others in the community.

## **3. Social Capital**

Explain how the project builds social capital: shared values, trust, and increased networks for community members. Describe the targeted population and how you engage new participants in the democratic process. Tell us how the affected population is involved in planning and decision-making for the project and share examples of how participants are becoming more active in the community and broadening their circle of relationships and involvement with other groups new to them.

## **4. Community Capacity**

Describe how the project is enhancing community capacity and building power to mobilize and solve problems. What role does your grassroots constituency play in power-building? Tell us how you are collaborating with other organizations and developing effective networks. Share evidence that demonstrates that the organization has moved issues and policy positions into the domain of public opinion and become a relevant player on the issue(s) of interest.

## **5. Organizational Capacity**

Describe the skills and experience of key staff/volunteers and other resources to support your work. Briefly note other funds secured and plans for ongoing fundraising.

## **6. Community organizing campaign chart (Program Support Applications only)**

Tell us about your grassroots campaign(s). Complete a chart for key community organizing campaigns. Please use the chart template on the next page. Keep each campaign chart between 1 to 2 pages each. Refer to the Additional Application Instructions for a sample chart and a glossary of organizing terms to assist you in completing the chart.

## Campaign Chart Template

Please complete one chart for each key campaign. For multiple campaigns, duplicate this template within this proposal. Do not attempt to fit all campaigns into one page.

Name of campaign: \_\_\_\_\_

<b>Constituency</b> <i>People most directly affected by the problem, who can be recruited to join your organization</i>	<b>Targets</b> <i>A decision-maker within an institution with the power to give the organization its demands</i>	<b>Demands</b> <i>Specific and measurable ask that the group presents to the target to resolve the issue</i>	<b>Tactics</b> <i>An action or set of actions that are carefully planned to achieve your campaign goals</i>
<p>Who will you mobilize?</p> <p>How many individuals are active now?</p> <p>How many individuals do you plan to recruit into the campaign?</p> <p>How often do they meet?</p>	<p>Name identified and/or potential targets, their institution, and their position on the issue.</p>	<p>Indicate the campaign's demands and time frame.</p>	<p>List the top tactics the campaign will implement and the role of constituents.</p>

# The Foundation Roundtable: Common Grant Application

## Board of Directors/Governing Body

**Directions:** Please use 12-point font. Attach additional sheets if necessary.

Name	City	Affiliation/Profession	Board Position	Yrs. of Service

How often does your governing body meet?

What is your philosophy/goal for diversity on your Board of Directors & Committees, and are you meeting those goals with the current Board/Committee members?

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

Total Capital Expenses			
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*i.e., computers, vehicles, building improvements, etc.:*

**Notes:**



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**Organization Balance Sheet Summary**

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

<b>ASSETS</b>	<b>MOST CURRENT (\$)</b> as of [ / / ]	<b>PRIOR YEAR CLOSE (\$)</b>
<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>		