

Herbert Bearman Foundation Grant Application

Cover Letter

Include a cover letter on letterhead that contains the following information:

1. Briefly explain the purpose of the request and the dollar amount requested.
2. Explain how your organization's proposal fits with the funder's mission and grantmaking interests.
3. Provide the contact person's name, title, daytime telephone number, E-mail address, and fax number.
4. For new programs, the letter must be signed by the board president or chairperson and the executive director to demonstrate approval of the request. For convenience, you may submit two letters signed separately. For ongoing programs, you may include a statement in the body of the letter that indicates the board has authorized the executive director to seek the funding requested.

II. Proposal Narrative (maximum of 6 pages)

The following outline is a guide to the information to be provided in the proposal narrative. Use the format as appropriate for your organization's request.

A. Organizational Background

1. Provide one to two paragraphs that succinctly describe the organization's history, mission, and goals.

B. Purpose of Request and Anticipated Results

1. State the issue or need to be addressed, describe the size and/or severity of the issue or need, and explain the evidence regarding this issue or need. If applicable, provide demographic and geographic information regarding the community or population benefiting from or served by the request.
2. Describe the program or project. For new programs, describe how the program model was developed. For ongoing programs, describe the program's track record.
3. Discuss the anticipated results (outputs and/or outcomes) for the request. Explain how the activities directly and/or indirectly address the issue or need and support achievement of these results.
 - For general support requests, describe how the request will enhance organizational capacity, sustainability, and/or the achievement of measurable results for the organization
4. Indicate what process and/or impact information will be collected to measure and demonstrate success.
 - For general operating support requests, please describe how your organization assesses its overall success and effectiveness.
5. If applicable, provide a timeline for implementing the request.

C. Organizational Capacity

1. Describe the organization's ability to implement the request or explain the organizational limitations that funding will address. Include information on the following, as applicable to the request:
 - a. Explain how this proposal relates to the organization's mission, goals and/or strategic plan, and other activities planned for this year.
 - b. Describe how the request will enable the organization to build its capacity, address current limitations, or improve its ability to meet program or organizational goals.
 - c. Describe the organization's current programs and activities, track record, related program or organizational accomplishments, accreditation, awards, or other strengths that enhance capacity or sustainability.
 - d. Describe the organizational structure and board/staff responsibilities. List the names, qualifications, and number of years in their position for key staff and/or volunteers relevant to the current request.
 - e. Indicate links with other organizations doing similar work in your geographic area or on the same issue.
 - f. Describe the organization's relationship with stakeholders, such as community residents, clients, staff, board members, or other constituents.
 - g. Indicate organization affiliation with federated funds or public agencies.

D. Additional Narrative Elements for Capital Campaign Requests Only

Capital campaign requests are designated for construction, renovation, or improvement of a property. Include information on the following, as applicable to your organization's request:

1. Provide a case statement for the project that discusses the feasibility and cost of the capital campaign and its implications in relation to the organization's ongoing operational expenses.
2. Specify prospects and naming opportunities.
3. Indicate the board's financial participation in the campaign (percent participating and amount contributed).
4. Identify regulatory approvals, if required.
5. Describe plans for funding the ongoing maintenance of the new capital project.
6. Indicate if timing is a factor or a "window of opportunity" exists that impacts the success of the campaign.

III. Attachments

The following attachments are **required**:

A. Finances

1. Financial statements from the two most recently completed years, audited if available. Explain any significant changes in the budget (percent increase or decrease) that may have occurred during this time. Provide a copy of the organization's most recent IRS Form 990 tax return if audited financials are not available.
2. Organization budget for current year, including income and expenses. You may supply the organization's budget as currently prepared or use the format attached.
3. Program or capital campaign budget that includes income, expenses and pending sources of support. You may supply the budget as currently prepared plus pending support or use the format attached.
4. If applicable, provide a short narrative that explains anticipated sources of support, planned fundraising campaigns or events, significant changes in the organization's operating budget, or other financial line items that may be unclear.

B. Board of Directors

1. List the board members, responsibilities and affiliations. Describe the board's financial support of the organization (percent contributing and amount contributed) for the most recently completed fiscal year.
2. Describe the criteria for selecting board members.

C. Other

1. A copy of the organization's current IRS determination letter (or the fiscal agent's) indicating 501(c)(3) tax-exempt status.
2. A copy of the organization's registration with the Charitable Organization Division of the Office of the Secretary of State for the State of Maryland, or indicate the reason for exemption.
3. Copy of the organization's most recent annual report (if available).
4. If this request includes partner organizations, please provide a copy of a Memorandum of Understanding or a description of the roles and responsibilities for each organization that is signed by all parties.

D. Optional: letters of support, recent newspaper/magazine articles. Please use discretion in limiting additional attachments.

Program/Project Budget—Current Request

This format is optional and can serve as a guide to budgeting. If you already prepare project budgets that contain this information, you may submit them in their original forms. Attach a narrative explaining the budget, if necessary.

PROGRAM/PROJECT INCOME

Fiscal

Year: _____

<u>Source</u>	<u>Amount Committed</u>	<u>Amount Pending*</u>
Support		
Government grants	\$	
Foundations	\$	
Corporations	\$	
United Way or federated campaigns	\$	
Individual contributions	\$	
Fundraising events and products	\$	
Membership income	\$	
In-kind support	\$	
Investment income	\$	
Revenue		
Government contracts	\$	
Earned income	\$	
Other (specify)	\$	
	\$	
	\$	
Total Income	\$	

*Note: Pending sources of support include those requests currently under consideration. Please indicate anticipated decision date

PROGRAM/PROJECT EXPENSES

<u>Item</u>	<u>Amount</u>	<u>%FT/PT</u>
Salaries and wages (break down by individual position and indicate full- or part-time.)	\$	
	\$	
	\$	
	\$	
SUBTOTAL	\$	
Insurance, benefits and other related taxes	\$	
Consultants and professional fees	\$	
Travel	\$	
Equipment	\$	
Supplies	\$	
Printing and copying	\$	
Telephone and fax	\$	
Postage and delivery	\$	
Rent and utilities	\$	
In-kind expenses	\$	
Depreciation	\$	

Other (specify)	\$
	\$
Total Expense	
Difference (Income less Expense)	

Organization Budget

This format is optional and can serve as a guide to budgeting. If you already prepare an organization budget that contains this information, you may submit it in its original forms. Attach a narrative explaining the budget, if necessary.

ORGANIZATION INCOME

FISCAL YEAR: _____

<u>Source</u>	<u>Amount</u>
Support	
Government grants	\$
Foundations	\$
Corporations	\$
United Way or other federated campaigns	\$
Individual contributions	\$
Fundraising events and products	\$
Membership income	\$
In-kind support	\$
Investment income	\$
Revenue	
Government contracts	\$
Earned income	\$
Other (specify)	\$
	\$
	\$
	\$
Total Income	\$

ORGANIZATION EXPENSES
YEAR: _____

FISCAL

<u>Item</u>	<u>Amount</u>
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Salaries, wages and benefits	\$
Insurance and/or other taxes	\$
Consultants and professional fees	\$
Travel	\$
Equipment	\$
Supplies	\$
Printing and copying	\$
Telephone and fax	\$
Postage and delivery	\$
Rent and utilities	\$
In-kind expenses	\$
Depreciation	\$
Other (specify)	\$
	\$
	\$

Total Expense

Difference (Income less Expense)

\$