



## APPENDIX II

### EXAMPLES OF GUIDELINES

#### LOIS AND RICHARD ENGLAND FAMILY FOUNDATION

##### Grant Submission Guidelines

Grants range from \$500-\$15,000, with the majority of grants between \$2,500 and \$5,000. The Foundation makes operating grants, so organizations need not create special projects.

As a member of the Washington Regional Association of Grantmakers, the Foundation accepts, but does not require, its Common Grant Application. Grantseekers are encouraged to call the Foundation office to discuss their request prior to submission.

There is no formal application procedure; the Foundation requests that you provide a brief 3-5 page proposal and supporting documents with the following information:

- A brief description of the history, purpose and activities of your organization
- A statement of the need for support, and how support would be used
- A copy of the current operating budget and most recent audit
- A breakdown of funding resources
- List of current foundation and corporate support with amounts

- A project budget, if applicable
- A certificate of tax-exemption
- Board of Directors list, including officers
- Copy of latest annual report, newsletter or materials to illustrate your work

## JOSEPH AND CLAIRE FLOM FOUNDATION

### Application Procedures and Grant Policies

All grants are made by the board of directors or by the executive committee acting on its behalf. The full board meets to consider grant applications regularly throughout the year. There are no formal deadlines for receiving applications.

The Foundation does not make grants to individuals or operate scholarship, fellowship, or travel grant programs; it does not make grants for basic operating expenses, endowments, equipment for existing programs, or physical facilities of educational or human service institutions; nor does it make program-related investments.

Initial approach to the Foundation should consist of a letter of inquiry addressed to the Director which describes the proposed project, the sponsoring organization, the organization and project budgets, and other existing and potential sources of funds. If the request falls within the Foundation's guidelines, a formal application will be requested.

When the Foundation receives a proposal, an acknowledgment is sent within two weeks, unless the request falls outside its program area, in which case it is immediately declined. Each proposal accepted for consideration is reviewed by Foundation staff. Staff and trustees may make a site visit or meet with the prospective grantee. After the board of directors makes a decision on the application, the applicant is contacted by letter.

The majority of grants will range in size from \$10,000 to \$50,000. Although we do not make multiple year grants, renewals will be considered on an individual basis.

The Foundation expects to receive written reports about funded projects and financial accountings of the expenditure of the funds. A reporting schedule and a list of questions indicating the kind of information to be included in the reports are sent to the grantee with the grant authorization letter.

## **GAIA FUND**

### **Grant Application Procedure**

To apply for a grant, applicants should submit a single-page letter of inquiry with a brief description of the project for which the organization is seeking funding. If the Fund is interested in considering the request, applicants will be asked to submit a second, more detailed application letter. This letter should include:

- A statement of purpose and goals
- Strategies for achieving the stated goals
- The criteria that will be used for determining whether or not the stated goals are achieved
- Profiles of the key people responsible for carrying out the program that is the subject of the request
- A program budget summary
- The amount requested from Gaia fund
- Other funding sources and grant amounts

The application letter should be limited to four pages. In addition to this letter, applicants are asked to furnish their organization's annual report, audited financial statements, a detailed project budget, and 501(c)(3) documentation. Additional attachments to the application letter are discouraged.

Receipt of grant applications will be confirmed by mail. Applicants will be contacted if additional information is needed, or if the Fund wishes to schedule a site visit or face-to-face meeting.

### **Grant Decisions**

Funding decisions are made during Gaia Fund's semiannual board meetings, held in May and November. A complete application letter must be submitted by March 15th for consideration in May, and by September 15th for consideration in November. Grantseekers who have submitted applications for consideration during the May board meeting will be notified of the Fund's decision by June 30th. Applicants will be notified of decisions made during the November board meeting by December 31st.

## How to Contact Gaia Fund

Correspondence should be addressed to:

Gaia Fund  
235 Montgomery Street  
Suite 1011  
San Francisco, CA 94104-3003

Applicants are asked to communicate with the Fund via regular mail. Gaia Fund will not respond to requests judged to be part of a mass mailing, or those that are submitted via phone, email, or fax.

## THE GROTTO FOUNDATION

### Guidelines and Grant Information

Often people who write grant proposals are grappling with a tremendous task. They have a wonderful concept, community support and commitment, and are then confronted with the challenge of making their vision fit into pre-existing foundation guidelines. Unfortunately, as a result, many people are unnecessarily frustrated.

The Grotto Foundation guidelines have been developed to give our staff and Board as much information as possible about your project and your organization — not as an obstacle to potential applicants. The Minnesota Common Grant Application, with the additional attachments outlined below, should be sufficient for our needs. In lieu of using that, you may submit your proposal in any way that you feel most readily conveys what you want us to know. If we need more information, we will ask for it.

Grotto Foundation accepts the **Minnesota Common Grant Application Form** with additional material requested by the Grotto Foundation outlined in the Annual Report.

To be sure that your project is a good fit and is presented well, you will want to :

- Check the **Mission Statement of Policy** to be sure that the Grotto Foundation goals and objectives for grantmaking are consistent with your grant request.
- Include a cover letter that introduces your organization and your proposal, and makes a link between your proposal and the mission, goals and objectives of the Grotto Foundation.

- Type your proposal. Don't hesitate to reproduce the form on your computer. If you must make a choice between using more space or using a smaller font size, please use more space.
- Submit one copy of your proposal to the Grotto Foundation. If possible, in addition to the original proposal, we would appreciate a computer disc with your request on it. Please label the disc and include the name and version of your word processing program.

## THE JACOB AND VALERIA LANGELOTH FOUNDATION

### Grant Program

Since 1997, The Foundation's grantmaking program has been more clearly centered on the concept of convalescence. It seeks to stimulate creative thinking about a wide range of problems and issues posed by convalescence, not only for patients but also for their families and health care providers. The Foundation's goal is to support programs designed to humanize, improve, make more cost effective, and promote physical and emotional recovery from illness, accident, or other traumatic life-changing events. The Langeloth Foundation looks for project that:

- Create an innovative approach to convalescence or test a model program that, if successful, could be effectively replicated;
- Seek solutions for the problems faced by communities or populations that normally might be beyond the reach of good convalescent or rehabilitative care;
- Encourage interdisciplinary collaboration or establish interagency linkages that measurably improve the delivery of high quality restorative care;
- Demonstrate enhanced recovery among patients by improving their knowledge of their illnesses, paths to recovery, and rights as consumers of medical care;
- Support and strengthen the capacity of families and other care givers to contribute to the convalescent process;
- Promise to develop new knowledge and understanding about the field of convalescence.

The Langeloth Foundation views the field of convalescence broadly, as including not only the physical recovery from illness, accident, or trauma, but also, the psychological and emotional dimensions of recovery.

### **Types of Grants and Duration**

Grants are usually awarded for a period up to one year, but multi-year grants will be considered in special circumstances. Challenge or matching grants will be considered.

### **Eligible Institutions**

The Foundation welcomes proposals from health-related organizations such as:

- Direct health care providers, such as hospitals, nursing-facilities, rehabilitation specialists, home care agencies, etc.;
- Academic or research institutions such as schools of medicine, nursing, social work, and rehabilitation;
- Community-based organizations engaged in activities related to convalescence.

All applicants for funding must secure formal endorsement and clearance from appropriate authorities at their institutions.

### **Restrictions**

The grant program of The Langeloth Foundation is directed to institutions and organizations that provide health-related services and that are tax-exempt under Section 501(c)(3) of the Internal Revenue Code. The Foundation's grants are directed principally to activities conducted in New York State. Exceptions to this geographical limitation may be made for proposals that hold the promise of national impact or extensive replication.

The Foundation does not fund in the area of preventive medicine. It will not consider proposals for annual or capital campaigns, for building or renovation projects, or loan or emergency funds, or for direct patient care services. Neither will the Foundation make grants to individuals or for sectarian or religious purposes or political activities such as lobbying. The Langeloth Foundation will not fund any organization that discriminates on the basis of age, gender, national origin, race, religion, or sexual preference.

## SURDNA FOUNDATION

### Grant Application Procedures

We strongly recommend that prospective applicants submit the following in the form of a letter of inquiry before a full proposal is sent:

- Information about the organization's purposes and specific activities.
- A brief description of the program for which funds are being sought, including the time period to be covered.
- The principal outcome(s) expected.
- Budgets for the program for which funds are sought as well as for the organization.
- The amount being requested of the Foundation.
- Funding received to date for the program, as well as sources from which funding is being sought.
- The names and qualifications of the key personnel who will be responsible for the program.
- The most recent audited financial statements of the organization and its operating subsidiaries, if any.
- IRS certification of 501(c)(3) status of the organization.
- E-mail address for contact person at the organization.

*We do not generally fund individuals, capital campaigns or building construction, or projects that are internationally based or focused.*

Upon receipt of the letter of inquiry we will issue a notification of our 90-day consideration period. During that time we will make every effort to respond promptly and cordially to the request. We will work in collaboration with applicants and will move as expeditiously as possible to achieve our mutual goals.

Organizations which have received funding from Surdna may apply for continued support. If you intend to apply for additional support you must inform us in writing within 8 months of the receipt of your grant. Please note that organizations are eligible for a maximum of three consecutive years of funding.