

Dear Prospective Small Grant Applicant:

Thank you for your interest in Weingart Foundation's Small Grant Program. Before submitting an application we strongly encourage you to read these attached instructions. Doing so will help you present a strong proposal and avoid unnecessary delays in the consideration of your request.

The Small Grant Program is designed to increase access to funding and strengthen the capacity of small, community based, and developing organizations. We believe that these grants provide important support for much needed services to diverse communities throughout Southern California. Because of the large volume of grant requests and the Foundation's limited amount of funds available each year, applying to the Small Grant Program is a competitive process. Ultimately, we are unable to fund all requests. A declination of support from the Foundation does not indicate a lack of appreciation for the merits of a particular proposal or project.

Applicants can expect to be notified of our decision approximately three months from the submission deadline, assuming you have submitted all requested documents. As part of our review process, you may be contacted by a member of our program staff to obtain additional information.

For additional information regarding the Weingart Foundation, please view our web site at www.weingartfnd.org, or for information on other foundations you may also want to view the Foundation Center's web site at www.fdncenter.org.

If you have questions about the grant application process, please do not hesitate to contact Priscilla Savage, Grants Administrator at (213) 688-6311 or by email, psavage@weingartfnd.org.

Sincerely,

Fred J. Ali

Fred J. Ali
President & Chief Executive Officer
Weingart Foundation

GUIDE TO COMPLETING WEINGART FOUNDATION SMALL GRANT APPLICATION FORM

This guide is intended as a tool to help your organization provide complete and accurate information to the Weingart Foundation as we consider your request for funding. Please read these instructions carefully before completing the application.

GENERAL INSTRUCTIONS

Completing the Form

IMPORTANT: PLEASE LIMIT RESPONSES TO THE SPACE PROVIDED IN EACH SECTION. Be brief and summarize information to provide an accurate overview, using a font size of at least 10 point.

IF ANY ITEMS ARE LEFT BLANK OR IF REQUESTED ATTACHMENTS ARE NOT SUBMITTED, THE APPLICATION WILL BE CONSIDERED INCOMPLETE AND WILL NOT BE PROCESSED. Do not provide attachments as a substitute for completing any section of the application form, unless directed to do so in the application.

Submitting the Application

In preparing the application packet for mailing to the Weingart Foundation, please include the materials listed below.

- 1) One (1) original and one (1) copy of the signed application form. **PLEASE DO NOT FOLD, STAPLE, OR BIND FORMS.**
- 2) One copy each of these required attachments. If your agency is fiscally sponsored, please include attachments for your agency and your fiscal sponsor where applicable.
 - Detailed project budget stating committed, pending, and proposed sources of support (not applicable to general operating support requests)
 - Board of Directors list
 - Copy of organization's most recent IRS Form 990 with attachments (Schedule A)
 - Financial statements for organization's most recently completed fiscal year (please read the Foundation's financial documentation requirements found under section E of the application instructions)
 - Current annual operating budget (revenues and expenses for your current fiscal year)
 - Federal Internal Revenue Service (IRS) Determination Letter evidencing 501(c)(3) non-profit, tax-exempt status

All materials become the property of the Foundation and cannot be returned.

- 3) Mail the complete packet to:

Priscilla Savage
Weingart Foundation
1055 W. Seventh Street, Suite 3050
Los Angeles, California 90017-2305

- 4) Submission deadlines: Applications must be postmarked by one of the deadlines listed on our website. Agencies will be notified regarding grant requests approximately four months after the deadline.

If you have questions about the grant application process, please do not hesitate to contact Priscilla Savage, Grants Administrator at (213) 688-6311 or by email, psavage@weingartfnd.org.

PAGE-BY-PAGE INSTRUCTIONS
WEINGART FOUNDATION SMALL GRANT APPLICATION FORM

Important: This application form has been protected so that you may use the tab key to move your way through the application. **DO NOT UNPROTECT.** If you unprotect the document, all entered data will be lost.

PAGE ONE

A. Applicant Information

"Legal name of organization" is the name stated on the IRS 501(c)(3) letter. Also provide a DBA (Doing business as) or other name if applicable.

B. Fiscal Sponsor Information

Fill in this section only if your agency has a fiscal sponsor. Otherwise, leave this section blank.

A fiscal sponsor is a tax-exempt 501(c)(3) organization that agrees to accept and be responsible for grant funds on behalf of another organization, which typically does not have its own 501(c)(3) status or lacks the infrastructure to manage grant funds. The fiscal sponsor is responsible for the general management of grant funds, which can include keeping financial records, disbursing funds in accordance with the grant, and fulfilling reporting requirements.

C. Board of Directors Information

Provide requested information for the most recently completed fiscal year. If your agency is fiscally sponsored, complete this section for the Board of your fiscal sponsor. However, if your agency is fiscally sponsored but also has an informal or advisory Board, please include information for that body as well.

PAGE TWO

D. Mission and Services Information

Provide a brief overview of the organization's mission and objectives, number of sites, target population, geographic territory, and scope of current projects and services. When applicable, indicate if your organization is part of another organization and briefly describe the relationship between the organizations. For number of persons served, include only those directly served by the organization. If none, type "no direct services provided." The figure should represent unduplicated clients served during the past fiscal year. If exact figures are not available, provide estimates and denote with an (e).

E. Financial Information Summary

- The Foundation recognizes that this section uses accounting terms which may be unfamiliar. Some applicants have found it helpful to involve an accountant in completing this section. Please do not hesitate to contact us at the Foundation if you have questions.
- In filling out this section use your financial statements (audited, if available) for the most recently completed fiscal year for the organization. All figures should match the numbers in your financial statements.
- Round off all figures to the nearest dollar; do not include cents.

Financial Statements

Audited financial statements for the most recently completed fiscal year are required of all organizations in existence for more than five years and with operating income of \$500,000 or more. Organizations with annual income under \$500,000 or agencies founded within the last five years must submit an independent review of their financial statements, completed by a CPA. Small Grant applicants that cannot meet the financial documentation requirements may be eligible for a one-time exemption on a case by case basis upon review of the full application.

A financial statement is an historical report about the financial condition of an organization. There are various types of financial statement reports:

- An *audit* is the highest level of report. It is the examination of a company's financial statements by an independent public accountant.
- A *review* is a statement that, like an audit, is prepared from an organization's own data. The CPA provides input on how the information should be presented, verifies the major items and conducts some basic research.
- A *compilation* is a statement prepared from the organization's own data that had CPA input for presentation purposes only.
- *Internal statements* are prepared by the organization itself and may come, for example, from a software program.

Total Income and Expenses

These numbers should be the same as those in the financial statements you submit. If your organization incurred an operating deficit (expenses exceeded income), state how the deficit was managed. Examples include use of reserves or borrowing.

Net Assets

These figures should be taken directly from your *Statement of Financial Position* in your organization's audited financial statements. If you are using internal statements, this figure can also be found in your *Balance Sheet*.

Total Debt

All debt payable after one year. Do not include in this figure current liabilities, which are due within one year.

F. Request Information

Type of Request

Please select only one. Applicants should apply for the need that is of highest priority for your agency and fits Foundation guidelines. If considering a general operating support request, the agency's mission and programs should be strongly aligned with the Foundation's funding guidelines and priorities.

Project Description and Goals

State if project is a new or existing effort of the organization, its geographic focus, and target population. Specify how grant funds would be used (staffing, equipment, materials). Describe your goals for the project. For General Operating Support requests, provide a brief description of why you are requesting unrestricted support and why it is needed now.

Total Project Budget

Fill in the total budget for the project for which funding is sought. In general the project budget should not be the same as the organization's overall budget. For existing programs that are being expanded or

enhanced, the project budget should reflect only the portion for which new funding will be required, rather than the on-going amount needed from year-to-year to sustain the program. If you are applying for General Operating Support (GOS), leave this section blank.

Total Amount Raised Towards Project Budget

Provide the total amount secured to date in the form of firm pledges, commitments, or cash. Include only those contributions received specifically for the proposed activity; do not include contributions received for other, unrelated projects. If you are applying for GOS, leave this section blank.

Total Amount Requested from Weingart Foundation

Specify the amount you are asking the Foundation to consider as part of the total project budget. Please specify a dollar amount, rather than giving a range.

The Small Grant Program awards a maximum of \$25,000. Within this limit, it is up to agencies to decide the appropriate request amount based on your project budget and funding plan. However, please note that average grant awards range from \$10,000 to \$15,000. In addition, the Foundation will not generally fund an entire project budget. Applicants are strongly urged to apply for amounts that will generally not exceed 50% of the total project budget and to seek other sources of support.

Continued Financing of the Proposed Activity

Because the Foundation does not provide continuous or on-going operating support for agencies or projects, we are interested in how you plan to financially sustain the proposed activity in the future. Describe your plan and state as specifically as possible any potential funding sources that have been identified or secured (for example through multi-year commitments).

G. Supporting Documents Required

Attach one copy each of the following required attachments. If your agency is fiscally sponsored, please include attachments for your agency and your fiscal sponsor where applicable. **Please note that an application that is missing any of the supporting documents is considered incomplete and will not be processed.**

- Detailed project budget stating committed, pending, and proposed sources of support (not applicable to general operating support requests)
- Board of Directors list
- Copy of organization's most recent IRS Form 990 with attachments (Schedule A)
- Financial statements for organization's most recently completed fiscal year (please read the Foundation's financial documentation requirements found under section E of the instructions)
- Current annual operating budget (revenues and expenses for your current fiscal year)
- Federal Internal Revenue Service (IRS) Determination Letter evidencing 501(c)(3) non-profit, tax-exempt status

PAGE THREE

Signatures

Please ensure that the application is signed and dated by authorized representatives.

If the Foundation needs additional information, it will be requested. Foundation staff will initiate communication with your organization.

WEINGART FOUNDATION SMALL GRANT APPLICATION
(REQUEST FOR \$25,000 OR UNDER)

A. APPLICANT INFORMATION

Legal name of organization (as stated in IRS nonprofit determination letter)

Other name (DBA), if applicable

Address	City	State	Zip
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Telephone #	Fax #	Web site
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IRS tax ID number	Year incorporated
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Name and title of primary contact for the request	E-mail
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Name and title of organization's chief staff officer	E-mail
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B. FISCAL SPONSOR INFORMATION (if applicable)

Legal name of organization (as stated in IRS nonprofit determination letter)

Address	City	State	Zip
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Telephone #	Fax #	Web site
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IRS tax ID number	Year incorporated
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Name and title of organization's chief staff officer	E-mail
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C. BOARD OF DIRECTORS INFORMATION

Number of persons serving on the board:

Number of board meetings held during past fiscal year:

Total dollar amount of all Directors' personal financial contributions
to organization in most recently completed fiscal year (excluding in-kind):

D. MISSION AND SERVICES INFORMATION

Mission statement Provide an overview of organization’s mission or objectives and indicate whether your organization is independent or part of a larger organization (100 word maximum)

Background Briefly describe target population and scope of current programs and services offered (250 word maximum)

Number of children served during past fiscal year: _____, and adults:

Number of staff: _____ (FT) _____ (PT) Number of volunteers:

E. FINANCIAL INFORMATION

Please review the Foundation’s financial documentation requirements found in the application instructions under section E. Please report on most recently completed fiscal year, which ended (month/day/year):

Financial statements (check one): Audit Independent review Compilation Internal

Total income: \$ _____ Total expenses: \$ _____

If expenses exceeded income for the year, explain reason:

How was the deficit financed?

Total net assets: \$ _____ Total debt: \$ _____

F. REQUEST INFORMATION

Type of request (check one): Capacity Building Capital
 General Operating Support Program Development

Project title One brief sentence. If requesting general operating support, write “GOS.”

Project description and goals Provide a brief description of project, including geographic focus area, target population, specific use of requested funds and projected goals and outcomes. For GOS requests, provide a brief description of why you are requesting unrestricted support and why it is needed now. (250 word maximum)

Total project budget (not applicable to GOS requests): \$ _____

Total amount raised towards project budget (not applicable to GOS requests): \$ _____

Total amount requested from Weingart Foundation: \$ _____

How will continuation of the proposed activity be financed after initial funding has expired?
(100 word maximum)

G. SUPPORTING DOCUMENTS REQUIRED

Please include the following items in your proposal. If your agency is fiscally sponsored, please include attachments for your agency and your fiscal sponsor where applicable.

- Detailed project budget stating committed, pending, and proposed sources of support, if applicable
- Board of Directors list
- Copy of organization’s most recent IRS Form 990 with attachments (Schedule A)
- Financial statements for organization’s most recently completed fiscal year (please read the Foundation’s financial documentation requirements found under section E of the application instructions)
- Current annual operating budget (revenues and expenses for your current fiscal year)
- Copy of organization’s IRS determination letter of 501(c)(3) status

Please do not submit an application without all of the required attachments, as incomplete applications will not be processed.

Submission of an application indicates your organization's permission for Weingart Foundation to make an independent inquiry about your organization, board, staff and others with whom you are affiliated. Signatories attest to the accuracy of the information.

Signature _____

Date _____

Type name and title:

Mail the complete packet to:

Priscilla Savage
Weingart Foundation
1055 W. Seventh Street, Suite 3050
Los Angeles, California 90017-2305

No documents by fax or email, please.