

THE CATHOLIC FOUNDATION GRANT APPLICATION INFORMATION

The Catholic Foundation aims for accessibility, objectivity, fairness and professionalism in all of its dealings with its constituents. Under the terms of its charter, the Catholic Foundation can distribute grants only to qualified public entities or 501(c)(3) charities. The Foundation neither lends nor grants money to individuals or political organizations. **Grant applications following a year in which the organization was successful in receiving a grant from The Catholic Foundation are discouraged.** Organizations with an open grant may not apply until the open grant has been completed, fully funded and the Final Report submitted to the Foundation. **Grant requests may not exceed \$100,000.**

Grants are made in three areas: Educational, Charitable and Religious. Foundation grants are to provide funding assistance in the Diocese of Dallas only. The goal is that each organization in the Diocese benefit from a Catholic Foundation grant from time to time.

SPECIAL NOTE: As of Fall 2009 grant requests from Diocesan entities for ANY EXPENDITURES of any type in excess of the lesser of (a) 10% of total revenues or (b) \$50,000 must show they have been approved by the Bishop of the Diocese. (See Sec. III.B.4 of Grant Application)

The Foundation looks for one or more of the following conditions in a proposal:

- * Foundation support would be vital to a proposed project's success
- * A collaborative network exists that multiplies the impact of the grant
- * The proposed project is likely to continue and expand after the grant period/becoming self supporting
- * The proposal is innovative and efficient in its use of funds
- * Expenses are reduced by sharing resources with other agencies or groups
- * The project is a well-planned approach to solving a problem and delivering services
- * The project promotes better human relationships and a sense of community
- * The project helps fulfill the mission of your organization
- * The project will be funded within one year of the grant

Grants are not made to or for purposes of:

1. Annual fund-raising events or drives
2. Debt reduction
3. Professional conferences, symposia or attendance at seminars or meetings
4. Organizations not supported or endorsed by the Catholic Church or not serving an identifiable Catholic population
5. Endowments or Individuals
6. Funding more than one year of a program's costs
7. Operating costs, unless related to a new initiative or program

Applications are processed two times a year, but may be submitted at any time. Deadlines for grant applications in 2012 are: January 26th and August 23rd. Applications received after these dates will be considered in the next cycle. **Applications must be completed in accordance with the attached form and four (4) copies submitted, including all attachments.** Incomplete applications will be returned. Please do not contact Foundation Trustees about your application.

Organizations not specifically recognized as Catholic must attach written support from an active religious in the Dallas Diocese.

APPLICATION CHECKLIST

(To Be Completed and Returned With **4 Copies** of Grant Application & Attachments)

I. PROPOSAL SUMMARY, including:

- ___ Project Description
- ___ Total Cost of Project and Amount Requested
- ___ Signatures (Pastor, if church; Pastor & Principal, if school)

II. NARRATIVE (two pages maximum)

- ___ Background of your organization
- ___ Funding Request - Please be specific
- ___ Budget for the project (including bids & proposals)
- ___ Sources of income for the project

III. ATTACHMENTS:

- ___ Most recent Financial Statement. **Also include copies of any audited or reviewed financial statements prepared by an outside accountant.**
- ___ Current year operating budget with revenue & expenses
- ___ List of Board of Directors or Parish Finance Council
- ___ Copy of most recent IRS letter indicating agency's tax exempt status
- ___ Two (2) competitive bids or proposals for purchases of computer equipment, furniture, fixtures or other equipment. (Computer equipment requests must also include a copy of technology plan & a training component or explanation why none is needed.)

IV. MAJOR CONSTRUCTION/RENOVATION PROJECTS: Any expenditure of any type in excess of the lesser of (a) 10% of total revenues, or (b) \$50,000 by a parish, parochial school, diocesan high school or other diocesan entity must show:

- ___ Written approval from the Bishop of the Diocese.
- ___ Approval of Diocesan Building Commission and/or Liturgical Commission, if needed.
- ___ Diocesan Finance Council approval if the project is being paid for with loans.

4 COPIES OF APPLICATION AND ALL ATTACHMENTS MUST BE SUBMITTED

**THE CATHOLIC FOUNDATION
GRANT APPLICATION**

I. PROPOSAL SUMMARY:

A. Agency _____
Address _____
Location _____

B. Briefly explain why your agency is requesting this grant, what outcomes you hope to achieve, and how you will spend the funds if a grant is made. Also, explain how this grant will further the educational, charitable or religious purposes of the Catholic Church in the Diocese of Dallas.

C. Names, titles and phone numbers of the individuals who will direct the project:

_____	_____	_____
(Main Contact Person for Grant Site Visit)	(Title)	(Phone #)

E-mail Address of Main Contact Person: _____

Number paid full-time staff: _____ Number of volunteers: _____

Number of additional staff required for this project, if any: _____

D. Total cost of project: \$ _____ Amount requested in this grant: \$ _____

E. When do you anticipate starting project: _____

Completion date: _____ Services begin: _____

F. Has The Catholic Foundation funded this project or any other program with your organization before? _____ Date: _____ Amount: _____

My signature verifies that the organization applying for this grant currently has a tax exemption under the Internal Revenue Code 501(c)(3) and is not classified as 'a private foundation' as defined under Code section 509(a). My signature is made as one who is authorized to do so on behalf of the applied organization.

Project Director

President of Organization

Date

Date

II. NARRATIVE: two pages maximum.

A. Background - Describe the work of your organization, addressing each of the following:

1. A brief description of its history, mission and targeted service group.
2. Current programs and accomplishments. Please describe the measurable achievements of the recent past.
3. Your organization's relationships with other organizations working to meet the same needs or providing similar services. Please explain how you differ from these other agencies.

B. Funding Request - Please describe the program (project) for which you seek funding.

1. A statement of the program's primary purpose and the need or problem that you are seeking to address and how it helps fulfill your mission.
2. The population that you plan to serve and how this population will benefit from the project (be specific on numbers).
3. Are other organizations able to assist you in the implementation of the project, and if so, how?
4. Does project require future funds? If so, how will these be obtained?
5. Is this project one of the top three needs of your parish or organization? Identify those priorities and indicate how this grant request meets those priorities.
6. Is this grant request part of a written strategic (or capital) plan? Describe.
7. The **BUDGET FOR THE PROJECT**. Identify the specific uses of the requested grant (i.e., materials, capital construction, salaries, etc.).
8. A list of all **SOURCES OF INCOME** toward the project, actual and prospective with amounts. Identify money received vs. pledged.

C. Evaluation - Please explain how you will measure the effectiveness of your activities. Describe your criteria for a successful program and the results you expect to have achieved by the end of the funding period.

III. ATTACHMENTS:

A. Financial Information

1. Your **MOST RECENT FINANCIAL STATEMENT**, audited if available.
2. Your current year operating budget with revenue and expenses. If grant request is included, show it as sub-heading.

B. Other Supporting Materials VERY IMPORTANT: Your request cannot be considered without the following information when applicable.

1. A list of your Board of Directors (or Parish Finance Council) with addresses and phone numbers.
2. A copy of your most recent IRS letter indicating your agency's tax exempt status, or, if not available, an explanation.
3. Written support from an active religious in the Dallas Diocese if your organization is not specifically recognized as Roman Catholic.
4. **Major Expenditures/Construction/Renovation Projects:** ANY expenditure of any type in excess of the lesser of (a) 10% of total revenues, or (b) \$50,000 by a parish, parochial school, diocesan high school or other diocesan entity must be approved in advance by the Bishop of the Diocese. Requests for approval should be directed through the Chief Financial Officer. "Expenditures" include the aggregate amount due on any contract or lease.

The request should be accompanied by evidence of Diocesan approval from the Bishop or Building Commission and Finance Council approval, if required. In cases where a project of \$50,000 is not formally reviewed by the Building Commission or Finance Committees then an approval letter from the Bishop or Chief Financial Officer and the Director of Construction and Real Estate must accompany the grant request. If the information is not present then the grant request will be incomplete and will be returned.

If the grant request is for a change or addition to a worship space, then approval of the Diocesan Liturgy Commission must be obtained regardless of amount of the request. A copy of the approval letter must be included with the request.

If the applicant is not subject to Diocesan construction or finance policies then the request must be accompanied by an engineering or architect's certification that the project is properly designed, at least two competitive bids and financial information showing how the project will be paid for.

5. **Requests for funding for major purchases of furniture, fixtures or equipment of any kind must be accompanied by copies of at least 2 competitive bids or proposals.**

If the information is not included the request will be incomplete and returned.

6. **Grants for computer equipment** should include a copy of the technology plan and must include a training component. If no training is needed then a statement to that effect and why must be included. At least two competitive bids must also be included as in 5 above.

9/14/11