

**TERMS OF GRANT AGREEMENT
FOR A HAND UP: A CHARITABLE FUND**

1. Applicant agrees that any grant received from **A Hand Up: A Charitable Fund** will be expended for the explicit purposes described in the grant proposal. In the event grant monies are to be allocated for any other purpose, agreement must be obtained from **A Hand Up: A Charitable Fund**.
2. If a grant is received, applicant agrees to credit **A Hand Up: A Charitable Fund** in the manner identified by **A Hand Up: A Charitable Fund** in any publications (including annual reports, newsletters), press releases, brochures, videotapes, and other publicity or public relations materials and presentations.
3. Applicant agrees, following expenditure of any grant received, to return a follow-up report to **A Hand Up: A Charitable Fund**. An itemized budget is part of this report.

I, the undersigned, have read and understand the Terms of Grant Agreement, and, should a grant be received, agree to follow its terms and conditions.

Applicant Agency

By _____
Executive Director

Date

**A Hand Up: A Charitable Fund
Grant Application
Section One
Organization Data**

Applicant Organization (Legal Name) _____
Previous Name, if changed _____
Street Address _____
City _____ State _____ Zip _____ County _____
E-mail _____ Web Site _____
Phone(_____) _____ Fax(_____) _____
IRS Name, as listed on 501(c)(3) letter _____
IRS letter date _____ Tax Exempt ID number (EIN) _____
Executive Director _____ Direct Phone(_____) _____
Organization's Budgeted Expenses for Current Year \$ _____ Endowment Size \$ _____
Organization's Major Funding Sources _____

Organization's Affiliation and/or Accreditation Body (check all that apply)

United Way ___ Fine Arts Fund _____ Better Business Bureau _____
Chapter of national or regional organization (specify) _____
Other (specify) _____

Request Data

Program/Project Title _____
Total Budget for this Program/Project \$ _____ Amount of this request \$ _____
Proposal contact person information: Name _____
Title _____ Phone(_____) _____ Fax(_____) _____
E-mail _____
Community Counties served by this Program/Project _____

Brief demographic description of population served by this Program/Project _____

Type of request (check all that apply)

Capital _____ Program /Project _____ Endowment _____
Technical Assistance _____ Start Up _____

(Both required signatures unless otherwise specified by funder)

Signature of Executive Director: _____ / _____

(date)

Signature of President _____ / _____

(date)

The narratives for Sections Two through Six should not exceed five pages. Responses must be typed, single-spaced, single-sided and use a minimum of 12-point type.

Section Two – Profile of Organization

- 1) Brief summary of organization's history.
 - 2) Brief statement of organization's vision/mission
 - 3) Brief description of current programs/projects and activities
 - 4) Description of organization's constituency and geographic region (if different than the project's as described above)
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Section Three – Statement of Need

- 1) Statement of need project is attempting to meet and evidence of that need.
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Section Four – Program/Project Description & Methodology

- 1) Description of program/project, including:
 - a) Activities to accomplish program/project (Is this a new or ongoing activity?)
 - b) Goals/objectives
 - c) Timetable for implementation
 - d) Duration of program/project
 - e) Evidence of use of best practices (Is this program/project based on a program that has been shown to be effective in other settings?)
 - 2) Will the organization collaborate with other organizations on this particular program/project (if so, with whom and how?)
 - 3) Why is your organization qualified and appropriate to address this need or benefit?
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Section Five – Evaluation

- 1) How will the short term, intermediate and/or long term outcomes be defined and measured? How will success be defined and measured?
- 2) How will the evaluation be conducted?
- 3) How will the people served be involved in the program/project evaluation?
- 4) How will the results be used and disseminated?
- 5) If this is an existing ongoing program/project, please summarize past quantitative and qualitative outcomes.

Section Six – Program/Project Funding Plans

- 1) List of other funders to which **this current** proposal has been and will be submitted. For each funder, indicate amount requested and status of request, i.e., request will be submitted, is pending, was funded or was declined. If funded, specify amount of grant.
 - 2) Other anticipated funding for this current proposal including:
 - a) Earned revenue
 - b) In-kind support
 - c) Special events
 - d) Fundraisers, etc.
 - 3) If this will be an ongoing program/project, describe plans and specific sources for future/long-term funding.
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Section Seven – Required Financial Attachments

- 1) Statement of Revenue/Support and Expenses for your organization's most recently completed fiscal/calendar year (see attached example form).*
- 2) Balance sheet for most recently completed fiscal year.
- 3) Most recent, complete audit including auditor's notes. If the organization does not have an audit done, then send the most recent 990.
- 4) Budget for the current fiscal/calendar year including a column showing the organization's year-to-date status (see attached example form).*
- 5) Project Budget for your entire project (see attached sample form).*
- 6) Provide pro forma project budgets for the next three years, if there are ongoing expenses associated with your project which increase the organization's operating budget by 20% or more, or if this is a new organization. The purpose of the pro forma is to show how the organization plans to sustain the project.

***If your existing financials are in a similar form as the attached example forms, they may be submitted.**

Section Eight – Required Non-Financial Attachments

- 1) IRS letters of determination 501(c)(3), or if such letter does not exist see specific funder requirements
- 2) Names, affiliations and demographics of board members
- 3) List of key staff members and qualifications, or an organizational chart
- 4) One or more examples of the following:
 - a) Annual reports
 - b) Organizational brochure
 - c) Sample newsletter
 - d) Program
- 5) Letters of commitment from collaborating organizations, if appropriate.

**STATEMENT OF REVENUE/SUPPORT & EXPENSE
FOR MOST RECENTLY COMPLETED FISCAL YEAR**

Name of Agency:

Time Period:

REVENUE SUPPORT	
Corporate grants	
Foundation grants	
Govt. grants/contracts/per diem (identify)	
Contributions	
United Way	
Other federated campaigns (identify)	
Fine Arts Fund	
Membership dues	
Special events, fundraisers	
Sponsorships	
Admissions	
Sales, rent	
Revenue, tuition	
Investment income	
Interest, dividends	
Other	
Total Revenue/Support	
EXPENSES	
Salaries	
Employee benefits, taxes	
Professional fees	
Equipment, supplies, materials	
Telephone, utilities	
Postage, mailing	
Occupancy	
Insurance	
Training, staff development	
Travel	
Conferences	
Evaluations	
Other	
Total Expenses	
Revenue less Expenses	

If expenses exceeded revenues/support, please explain. Accompanying narrative welcome if additional explanation is warranted.