Eligible organizations may submit one application per cycle. Please see our checklist for eligibility criteria. Please contact socal@wmkeck.org with any questions.

<u>The following information and documents are required for the application:</u>

- Applicant info
    - Applicant Organization Name, EIN, and Website
    - Payee Organization Legal Name, EIN, and Address *(if different from Applicant)*
    - Organization President, CEO, or Executive Director Contact Info
    - Lead Development Contact Info
- Organizational Documents
    - Organization Fundraising History Form *(template provided)*
    - Governing Board List *(names and affiliations only)*
    - Fact Sheet *(one page max)*
    - Current Audited Financial Statements
        - Organizations in existence for less than five years must provide full certified, audited financial statements for the most recent two fiscal years
    - IRS Form 990
    - State of CA 23701(d) Entity Status Letter *(for organizations headquartered in CA)*
    - Declaration of Status Letter *(for organizations **either** defined by IRS Section 170(b)(1)(A)(v) and (c)1 **or** under a group determination)*
- Project Info
    - Project Title
    - Amount Requested
    - Total Project Budget
    - Project Time Period
    - Project Abstract
    - Project Narrative **(instructions and template below)**
    - Project Budget/Revenue Form **(instructions and template below)**
    - Resumes of Key Project Personnel
    - Letters of Agreement or MOUs *(if applicable)*
- Capital Project Documents
    - Architect's Rendering *(if available)*
    - Exterior Photograph *(if available)*
    - Building Permit *(if available)*
    - Lease Agreement *(if applicable)*
    - Conditional Use Permit *(if applicable)*

Project Narrative

The Project Narrative form is available [here](#). Applications that do not use the correct form or comply with the following requirements will not be accepted.

<u>Formatting Requirements:</u>

- Do not change or delete the bolded headings from the form. All headings are required to complete the Project Narrative
- Single spaced on 8.5"x11" paper with 1" margins
- At least 12-point type, Times New Roman
- 5 page maximum

<u>Content Requirements:</u>

Organization Overview, Case Statement, and Impact: *(1 page maximum)* Provide a brief description of your organization. Describe the project, including its significance to the field, unique aspects, and how it will benefit the target population and/or build the capacity of your organization. Provide data to make your case. Include links to relevant data reports if available.

Goals and Methodology: *(2 page maximum)* State the project's goals and objectives; For capital projects, include programmatic objectives. Describe planning to date and results of any pilot efforts. Also include key activities to be undertaken and the implementation timeline.

For <u>program projects</u> include:

- If this project expands an existing program describe the current program, numbers currently served, staffing patter, evidence of effectiveness, any partnerships, and how the expansion will change each of these factors.
- If this project is for a new program describe the program model, any partnerships, projected number to be served, and staff to be hired.
- If program request is part of a capital projects, include timeline for completing the facility.

For <u>capital projects</u> include:

- Property ownership *(existing property, escrow closed or signed lease required at time of application)*, construction plan, facility design, date of receipt of conditional use permit *(if required)*, and expected date of receipt of building permit.
- Programs to be offered in the facility, current and projected numbers of people served, and staff hired *(if applicable)*.

Project Narrative (cont.)

Staffing and Evaluation *(1 page maximum)*

Personnel: Name the key management, program, and consultant personnel required to implement this project. Describe the role of each position, including new hires and consultants, listed in the budget. Summarize each of their credentials and experience in the field. For program projects that will utilize Keck funds for consultants, provide a rationale for why their expertise is necessary. For capital projects, indicate new staff positions needed if expending programs/services.

Evaluation: Describe the plan to evaluate the project's impact. Include the definition of success and indicators to be tracked. Indicate who will conduct the assessment and how the information will be used.

Resources *(1 page maximum)*

Fundraising:

For capital and program projects, state total project budget and amount raised to date. Name the top three sources, public and/or private, and amounts.

Describe the fundraising plan to secure the balance. Indicate source and amount of each pending proposal, if applicable.

If no government funding has been secured and/or if none will be sought for this project, please explain.

Describe rationale for the specific allocation of Keck Foundation funding.

For capital projects, also state if the construction budget is an estimate. If government funding and/or tax credits have been received or will be secured, state the private fundraising goal and amount raised toward this goal. If applicable: Indicate the amount and terms of short-term loans to bridge construction costs and pledges. Specify the financial threshold set by your board to go to bid and start construction.

Sustainability: For capital projects, indicate the plan to pay off long-term financing or mortgage reflected in the Budget/Revenue form, if applicable. State the current budget for programs that will be operated in the new facility. Indicate the projected increase in the program budget in each of the first two years after the new facility opens and plans for sustainability.

For program projects, describe how the project will be financially sustained beyond the project time period.

Project Budget/Revenue

There are two Project Budget/Revenue template: one for program projects, the other for capital projects.

The Program Budget form is available [here](#). The Capital Budget form is available [here.](#)

<u>Formatting Requirements:</u>

- At least 9-point type, Time New Roman
- Budget must display and print in landscape mode
- One page maximum
- Print test page to check formatting before uploading

<u>Content Requirements:</u>

- Requested amount must be a multiple of $25,000
- 'Total Project Budget' and 'Amount Requested' must be consistent across entire application
- Program Projects only:
    - If a multi-year project, indicate the total project budget for all years
    - Indicate the funding committed for the entire project time period cited at the top of the form
    - The total project budget may cover more years than the grant request time period