

Grant Proposal Instructions & Checklist

How to apply

1. Read the Guidelines, Priorities and Eligibility criteria.
 2. After determining eligibility visit fundforsantabarbara.org/grantee-portal/ and follow the instructions to be taken to the application portal.
 3. If you have any questions contact us at:
 - a. Email | grants@fundforsantabarbara.org.
 - b. Phone | (805) 962-9164 opt.3
 4. Applications will be accepted until the deadline and are subject to an initial screening by staff.
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Thank you for taking the time to apply to THE FUND FOR SANTA BARBARA. Please use this checklist to ensure you submit a complete application. If you have any questions, please contact The FUND office.

- Read the grant **Guidelines and Priorities** to confirm that the BCF is a good match for your project.
- Attend a **free Grant Application Workshop**. These workshops are strongly recommended and are open to anyone who wants to learn more about The FUND FOR SANTA BARBARA and our application process. To sign up for a workshop you may call us or RSVP at www.fundforsantabarbara.org.
- Optional Proposal Review: Submit a one-page project description, along with a budget and a list of key participants to FUND staff for review. Staff will provide feedback that may be valuable to you in drafting your proposal. This must be submitted by Friday, October 20, 2021 via email at grants@fundforsantabarbara.org.
- Complete the application via the application portal.

Required information and documentation you will need to complete your application:

- Request and submit an authorized Board Member's acknowledgement and endorsement of the grant application. This is located at the end of the application and can be completed at any time prior to submission.
 - If your group does not have 501(c)(3)/501(c)(4) status and are applying as an unincorporated group, select a lead from the Governing Body to be the authorized representative.
- Your organization's bank account name and financial institution.

- Provide your fiscal sponsor's financial institution information if applying with one.
- Note: Grant checks cannot be made out to individuals. Grant checks must be made out to an organized group with a bank account.
- Complete the Income and Expense Tables
- A one paragraph summary (175 words max) that addresses the following in the third person paragraph form:
 1. Start date of project
 2. Mission of organization
 3. What your proposal seeks to accomplish
 4. What funding would specifically pay for

Additional Requirements for 501(c)(3) or 501(c)(4) organizations

- A list of all key participants involved with your project (include role, title, key responsibilities and demographic makeup)
- A list of the Board of Directors/Governing Body of your organization
- A copy of the organization's 501(c)(3)/501(c)(4) IRS determination letter
- A copy of your State of California Franchise Tax Board determination letter

Additional Requirements for organizations applying with a fiscal sponsor

- A list of all key participants involved with your project (include role, title, key responsibilities and demographic makeup)
- A list of the Board of Directors/Governing Body of your organization

Gather the following information from your fiscal Sponsor

- A Tax ID Number
- List of the Board of Directors of the organization that is acting as fiscal sponsor
- A copy of the organization's 501(c)(3)/501(c)(4) IRS determination letter
- A copy of your State of California Franchise Tax Board determination letter

Additional Requirements for groups applying with Unincorporated status

If your organization doesn't have 501(c)(3)/501(c)(4) status or a fiscal sponsor you may apply as Unincorporated, and must include the following information

- A list of all key participants involved with your project (include role, title, key responsibilities and demographic makeup)
- A list of the Board of Directors/Governing Body of your organization
- An Employer Identification Number (EIN)
 - You can apply for an EIN online at:
<https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>
- A brief paragraph of how your group operates with a charitable purpose