

THE COMMUNITY FOUNDATION
of Shelby County

Build Today...Dream for Tomorrow

Louise Sheets Fund
Application Tips

Information for some of the more confusing application questions.

Organization and EIN#: List the applicant organization's name and its Employer Identification Number (EIN), sometimes referred to as the 'Tax ID Number.' If the applicant organization does not have an EIN, either leave it blank or state 'none.'

Program/Project/Equipment Name: Keep it brief, simple and direct. You can give a more lengthy explanation on page 2 of the application. Please list the same name at the top of page 2 to help us ensure that we keep your application pages together.

Program/Project/Equipment Total Cost: The entire expense to conduct the program or buy the requested equipment.

Requested Grant Amount: Of the **total cost**, how much are you asking the Sheets Fund to support with a grant? You may ask for the entire cost or a portion.

Brief demographic description of the population this program/project/ equipment would benefit, including estimated number of people directly served. Avoid saying 'entire community.' Please try to estimate if a new program or use recent data, if available. For instance, how many attended last year's event? How many club members might use the equipment requested in the grant? How many students are on the affected sports team? Example: a recent grantee asked for an AED (auto defibrillator) for a community hall. They noted the capacity of the hall and gave examples of its use for reunions, showers and chicken fries. This helped the grant committee understand the need.

Is the applicant organization have a 501(c)(3) entity or Is the applicant organization a governmental unit: This refers to the Organization listed on the top line of page 1. Check the appropriate boxes. If the answer to both questions is 'No,' will grant checks be made payable to a different entity?

If your organization will have the check go to a parent organization or other entity, please list the other organization's name and EIN in the box. Examples: A school club may want the check written to Botkins Local School or a community group may have an arrangement with the Village to assist with receiving money for a project.

The Community Foundation is required to have the EIN numbers of all grant recipients. If your organization does not have an EIN, it either needs to obtain one from the IRS or partner with an organization that has an EIN and will agree to receive a grant check on your behalf.

If you are unsure whether your organization is a 501(c)(3) tax-exempt charity, here's how to check the **www.IRS.gov** website: Click the 'Filing' tab and select 'Charities and Non-Profits', then click the 'EO Select Check.' In the center of the page is a blue rectangle with 'Exempt Organizations Select Check Tool,' click it and pick the 'Are eligible to receive tax-deductible contributions' button and then fill out one or more of the boxes. A list of charities may appear. Or you may see that no organizations fit the specifications. If you don't find

your organization, you may not have a 501(c)(3) tax-exempt status. Please call Marian Spicer if you need help locating your organization on the website.

If your organization does not have a 501(c)(3) IRS status, but is incorporated as an Ohio Non-Profit organization, a grant may be awarded. We are required to have extra documentation before we will send your check such as purchase orders or invoices for expenses. You can check your Ohio incorporation status on the Secretary of State's website at www.sos.state.oh.us, click 'Business Services' and then 'Search' where you can list your organization's name. If found, a listing will appear. Click the 'Entity Number' to see the organization's details, including whether the State has you listed as 'Active.'

Community Foundation staff will verify your IRS or Ohio incorporation status as part of our due diligence efforts.

Organization's Major Funding Sources: List the general categories of funding sources such as: booth at the Carousel, memberships, donations, tax revenue, popcorn fundraiser, car wash, etc. Do not list individual donor names or amounts.

Signature. We prefer the application form is signed by the top staff or officer of the applicant organization. If a payee organization is involved, it may be appropriate to have the form signed by an official with the payee organization, depending upon the formal connection of the two organizations.

Level 1

Summary: This is your opportunity to talk about the grant request and why it is needed and important to those directly served by the program/project/ equipment. Requests for capital expenditures such as equipment purchases or facility enhancements MUST include specifications and at least two vendor quotes.

Level 2 For organizations requesting \$10,000 or more.

What is the timeline.... Help us understand when events or phases will occur and be completed.

What other community organizations or government entities are affected... Please indicate whether you have informed other organizations that would be directly affected if this grant is approved. We want to know that you have communicated your plans with other directly affected organizations and worked out any issues before a grant is requested.

Board of Directors and Financial Statement: Please provide a list of your current board members and a financial statement from your last completed fiscal year. If your organization does not have a financial statement, you need to create a financial report that provides lines for your income sources and expenses for the past fiscal or calendar year. We want to know that your organization's officers have reviewed its finances and understand their fiduciary responsibility before asking for large grants.

Have questions about your application? Please call or email in advance of the deadline date. Our office is open Monday-Friday from 8:00am to 4:00pm. (937) 497-7800 or mspicer@commfoun.com