Foundation Grant Application

GRANT APPLICATION GENERAL INSTRUCTIONS

- The grant application has three parts. Be sure to complete each part.
- Applications may be types or handwritten.
- Provide all of the information in the order listed.
- All questions relative to the request must be fully completed.
- Submit only one copy.
- Do **not** include materials other than those specifically requested.

The Zurn Foundation Board of Directors meets semi-annually in July & January. If you would like your grant application to be reviewed at our July meeting, the cut-off date for submission of the completed application is June 1. The cut-off date for the January meeting is November 1.

Organizations will be notified if they have received a grant via postal mail by the end of the month following the Board of Directors meeting July/January. Organizations that do not receive a grant will not be notified.

Please mail your application along with the required supporting documents to:

Zurn Foundation
511 W. Freshwater Way
Milwaukee, WI 53204
Attn: Angela Hersil

If you have any questions, please email the Zurn Foundation at Zurn.Foundation@zurn.com

PART ONE: GRANT AND ORGANIZATION INFORMATION

GRANT REQUEST

Total Amount Requested: $_____   Date Submitted: _____

Name of Project: _____

Duration of Project: from _____ to _____

Nature of Request: ☐ Capital ☐ Project ☐ Operating ☐ Program ☐ Endowment

☐ Other (please specify) _____

In what geographical location will the funds be used? _____

ORGANIZATION INFORMATION

Name: _____

Address:_____

City: _____ State: _____ ZIP: _____

Phone Number: _____ Fax Number: _____

Web Address: _____

Federal ID #: _____ Date of Incorporation: _____

Chief Staff Officer (Name & Title): _____

Phone number: _____ Email Address: _____

Contact person (Name & Title): _____

Phone number: _____ Email Address: _____

Board Chairperson (Name & Title): _____

Phone number: _____ Email Address: _____

Dates of organization's fiscal year: _____

Organization's total operating budget for past year $_____ and current year $_____

Please list the organization's staff composition in numbers:

Paid full time _____ Paid part-time _____ Volunteers _____ Interns _____ Other _____

Total staff (both professional volunteer) _____

Has your organization's governing board approved a policy which states that the organization does not discriminate as to age, race, religion, disability, sexual orientation, sex or national origin?

Yes ☐   No ☐

If yes, when was the policy approved? _____

Does the organization have federal tax-exempt status? Yes ☐   No ☐
If no, please explain on separate sheet.

Population Served

Please check the **primary** service category of organization (check only one):

☐ Arts/Culture   ☐ Health   ☐ Human Services   ☐ Civil/Economic Development

☐ Education   ☐ Environment   ☐ Other(specify):_____

Provide percentages and/or descriptions of the populations the organization serves:

_____ African-American   _____ Caucasian   _____ Native American

_____ Asian American   _____ Hispanic/Latino   _____ Other(please specify)_____

Please list all known Zurn Elkay associates who provide financial support to your organization.

Please list any Zurn Elkay associates who serve on your Board of Directors or in other leadership positions within your organization.

Authorization

Has the organization's chief executive officer authorized this request?   Yes ☐   No ☐

An officer of the organization's governing body (such as a board member) must sign this application.

You will have to print out this form and sign the application for submission.

The undersigned, an authorized officer of the organization, does hereby certify that the information set forth in this grant application is true and correct, that the Federal tax exemption determination letter attached hereto has not been revoked and the present operation of the organization and its current sources of support are not inconsistent with the organization's continuing tax-exempt classification as set forth in such determination letter.

_____   _____   _____

Signature   Print Name/Title   Date

You must enclose all required support materials with the application (see Part Three).

Please provide the following information, in the order presented below. Note that some sections are not required for General Operating Support. Refer to the Glossary of Terms (last page) as needed when preparing the narrative.

Organization Information and Background

- Provide a brief summary of the organization's mission, goals, history, programs, and major accomplishments, success stories and qualifications.

- Show evidence of client & community support.

Project/Program Description (NOT required for general operating requests)

- Abstract: Briefly describe the proposed program, how it relates to the organization's mission, capacity to carry out the program and who will benefit from the program.
- Explain the significance of the program and why the organization is qualified to carry it out.
- Describe the expected outcomes and the indicators of those outcomes.
- Document the size and characteristics of the population to be served by the program.
- Outline the strategy/methodology and timeline to be used in the development and implementation of the program.
- What is the plan to involve the population you intend to serve in the design?
- How does this program entrance the existing services in the community?

Evaluation

- Briefly describe the program evaluation process.
- Explain how the organization will measure the effectiveness of the program.
- Describe the criteria for success.
- Describe the results expected to be achieved by the end of the funding period.

Funding Considerations

- Describe plans for obtaining other funding needed to carry out the project/program or organizational goals, including amounts requested of other funders.
- If the project/program is expected to continue beyond the grant period, describe plans for ensuring continued funding after the grant period.
- List the top five funders of this project (if applying for a Program Grant) or organization (if applying for General Operating Support) in the previous fiscal year, the current year, and those pending for the next fiscal year.

PART THREE: REQUIRED ATTACHMENTS

Submit the following attachments (in the order listed) with the completed proposal:

1. Complete list of the organization's officers and directors.

2. The organization's actual income and expense statement for the **past** fiscal year, identifying the organization's principal sources of support.

3. The organization's projected income and expense budget for the **current** fiscal year, identifying the projected revenue sources.

4. The organization's most recent audited financial statement including notes and IRS Form 990.

5. Copies of the IRS federal tax exemption determination letters.

6. Program Budget (multi-year if applicable). *NOT required for general operating requests*.

7. Grantee Report (if previously funded).

GLOSSARY OF TERMS

Capital Request: A planned undertaking to purchase, build or renovate a space or building, or to acquire equipment.

Community: The people living in the same district, city, state, etc.

Contribution: A tax-deductible gift, cash, property, equipment or services from an individual to a non-profit organization. Most often given annually.

General Operating Support: Funds, both contributions and grants, which support the ongoing services of the organization.

Grants: Generally an allocation from foundations, corporations, or government for special projects or general operating expense support. May be multi-year or annual.

Indicator: The observable, measurable characteristic or change that represents achievement of the outcome.

In-Kind Support: A contribution of equipment/materials, time, and/or services that the donor has placed a monetary value on for tax purposes.

Methodology: A sequence of activities needed to accomplish the program objectives.

Outcomes: The changes in (or benefits achieved by) clients due to their participation in program activities. This may include changes to participants' knowledge, skills, values, behavior, or condition of status.

Performance Standard: The number and percent of clients who are expected to achieve the results. Also called target, they should be based on professional judgment, past data, research, or professional standards.

Program: An organized set of services designed to achieve specific outcomes for a specified population that will continue beyond the grant period.

Project: A planned undertaking or organized set of services designed to achieve specific outcomes that begins and ends within the grant period. (A successful project may become an ongoing program.)

Success Story: An example that illustrates your program's effect on a client/group.