

**GUIDELINES FOR GRANTS TO BE CONSIDERED
BY THE DAVID C. COPLEY FOUNDATION
(EFFECTIVE FEBRUARY 2017)
www.copleyfoundation.org**

FUNDING INTERESTS:

The Foundation's mission is to carry on the Copley family's legacy of giving by funding nonprofit organizations making a difference in the areas of human services, military and military veterans, youth development, medical and medical research, education, arts and culture and animal welfare, especially those programs and services improving the life or opportunities of the underserved in the San Diego area.

GEOGRAPHIC FOCUS:

The Foundation focuses its funding primarily in San Diego County. From time to time, the Directors will consider programs outside of San Diego County if deemed particularly relevant to the mission of the Foundation and the family's legacy.

ELIGIBILITY:

Grant recipients must be classified by the Internal Revenue Service as public charities and tax-exempt under section 501(c)(3) of the Internal Revenue Code. No grants will be made to individuals, private foundations or for loans.

APPLICATION PROCESS:

Any applicant for a grant must first **submit online** a brief *Preliminary Grant Proposal* (required information listed on *Exhibit A*). This is designed to not waste the time of applicants who seek funding for projects not consistent with the funding interests of the Foundation. *Preliminary Grant Proposals* must be submitted early enough for consideration by the Foundation in order to give adequate time for an applicant to submit a *Complete Grant Proposal* by either **January 15th** or **July 15th** of each year so that it is received by the Foundation by these dates, and grants will be awarded in the spring and fall of each year. Applicants are encouraged to submit early enough in order for the Foundation to request additional information if necessary.

If the *Preliminary Grant Proposal* is consistent with the funding interests of the Foundation, the Foundation will request the applicant to **submit online** a *Complete Grant Proposal* (required information listed on *Exhibit B*). If the applicant is requested to submit a *Complete Grant Proposal* that does not imply that the Grant will be awarded by the Foundation, but only that the *Preliminary Grant Proposal* was consistent with the funding interests of the Foundation and on a preliminary basis the grant will be considered by the Directors based upon the submittal of a *Complete Grant Proposal*.

All applicants who have submitted a *Complete Grant Proposal* will be notified in writing of the Foundation's final decision regarding their proposal once the Directors have met. Grants are made for one year and imply no commitment to repeat donations unless specifically set forth at the time of original funding. Unfortunately, many more grant requests must be denied than approved. When an application has been denied, it will not be carried over for future consideration. Because of the volume of requests received each year, it is not feasible to engage in correspondence or telephone conversations with applicants regarding the Foundation's reasons for declining a request.

Exhibit A – Preliminary Grant Proposal

PLEASE SUBMIT A BRIEF PRELIMINARY GRANT PROPOSAL WHICH INCLUDES THE FOLLOWING INFORMATION:

- 1. Project Name (if any):**
- 2. Amount Requested:**
- 3. Total Amount of Money Necessary for the Project:**
- 4. Full Legal Name of Organization:**
- 5. Confirm Organization is a 501 (c)(3) and supply IRS determination letter:**
- 6. Federal Tax ID #:**
- 7. Contact Person, Contact information and title:**
- 8. Total Number of Board Members:**
- 9. Total Number of Staff:**
- 10. Total Number of Volunteers:**
- 11. History of the Organization. How long has it been in existence?**
- 12. Description of Program/Project:**
- 13. Description of Need. What is the issue you plan to address? What is your approach?**
- 14. Other (Use this space to provide any additional information that you feel would be relevant to this grant request that is not covered in the sections above or respond to any other questions an individual grant maker may have):**

Exhibit B – Complete Grant Proposal

If an applicant is requested to submit a *Complete Grant Proposal*, the following information is required:

- **Contact Information:** Organization name, address, telephone number, contact person.
- **Non Profit Status:** Verification of IRS 501(1)(3) tax-exempt status (e.g. IRS 501(c)(3) letter and FTB 23701(d) letter).
- **Structure of the Organization:** List of board of directors, officers and key administrative staff, and volunteer base.
- **History:** Background on the organization's history and its plan for the future. What is this organization? Describe the Organization's current programs and services, and its goals and objectives both short-term and long-term.
- **Organization Budget:** Current year budget of the Organization. Identifying all income sources and expenses for the organization, year-to-date financial statements (including Balance Sheet and Income/Profit and Loss Statement and the most recent audited financial statements, if available
- **Project Summary:** A brief and concise summary (not to exceed 5 pages) of the organization and program/project to be funded, number of persons affected and the target population, projected impact of the program/project on the community or geographic area and how results of the program/project will be measured by the organization and reported back to the Foundation. What is the issue you plan to address? What is your approach? What research supports your idea? How does your strategy differ from others in the field? Include information about service delivery and/or timeline. How will this grant strengthen the organization, address the issues, make improvements, or achieve success? What are the anticipated outcomes and how will you know if you are successful?
- **Project Budget:** Project budget, including other sources of financial support (Board of Directors, public and/or private) committed, conditional, potential and pending, and how and when funds will be spent.
- **Sustainability of Project:** Plan for sustaining the funded activity after initial funding expires, if appropriate.
- **Other:** Use this space to provide any additional information that you feel would be relevant to this grant request that is not covered in the sections above or respond to any other questions an individual grant maker may have.
- **Other Funding:** Use this section to indicate what funding you have received from other foundations, and from which other foundations you plan to seek funding. Describe any unusual or special circumstances and provide an explanation/justification of funding request and the amount.