GUIDELINES FOR GRANTS TO BE CONSIDERED
BY THE DAVID C. COPLEY FOUNDATION
(EFFECTIVE SEPTEMBER 2019)
www.copleyfoundation.org

THE FOUNDATION IS NOT CURRENTLY ACCEPTING UNSOLICITED APPLICATIONS AND WILL ONLY ACCEPT GRANT APPLICATIONS FROM THOSE APPLICANTS IT INVITES TO APPLY

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, unless approved by the Directors.

APPLICATION PROCESS:
There are two grant cycles each year. The Spring cycle deadline is January 15 and the Fall cycle deadline is July 15 of each year. Any applicant must first be invited to apply in writing by the Foundation CEO or COO. If an applicant is invited, the applicant must submit online a brief Preliminary Grant Proposal (required information listed on Exhibit A). This is designed to clarify the purpose of the grant request to insure it is consistent with the funding interests of the Foundation and for the Foundation’s internal screening process. If the Preliminary Grant Proposal is accepted by the Foundation, a link will be emailed to applicant to prepare a Complete Grant Proposal for submission by either the January 15th or July 15th deadline (depending on grant cycle). Required information for the Complete Grant Proposal is listed on Exhibit B. Applications received by the January 15 deadline are reviewed in the Spring and applications received by the July 15 deadline are reviewed in the Fall. Applicants are encouraged to submit their applications well in advance of the submission deadline dates in order to allow the Foundation to request additional information if necessary.

All applicants who have submitted a Complete Grant Proposal will be notified in writing of the Foundation’s final decision regarding funding 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, the Foundation cannot fund all the grant requests it receives, and your grant may be denied. When an application has been denied, it will not be carried over for future consideration nor is it feasible to engage in correspondence or telephone conversations with applicants regarding the Foundation’s reasons for declining the request based on the volume of applications received each year.
Exhibit A – Preliminary Grant Proposal

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

1. Project Name
2. Project 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. Background of CEO/Executive Director
9. Total Number of Board Members
10. Total Number of Staff
11. Total Number of Volunteers
12. Annual Budget
13. History of the Organization. How long has it been in existence?
14. Description of Program/Project
15. Description of Need. What is the issue you plan to address? What is your approach?
16. 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.