



Capital Project Grant Proposal

The Trustees of The Harry and Jeanette Weinberg Foundation invite your organization to submit a complete capital grant proposal. Please follow these instructions and the page limits carefully. **Only one copy of the materials is requested. Please do not bind materials.**

A FEW POINTS OF INFORMATION:

- Written requests for grants are accepted and reviewed throughout the year.
- Receipt of your organization's grant proposal will be acknowledged in a timely manner.
- Analysis of grant requests may require several months.
- We may request a site visit or a meeting after the review of the complete proposal.
- Reporting and Evaluation Requirements will be discussed with the grantee if a grant award is made. If a grant is awarded, the grant contract will specify the exact evaluation and reporting requirements.
- Within a capital grant, the Foundation may not contribute more than 30% of the total cost of the capital project. Typically, the Foundation awards grants for less than 30% of the total cost of the capital project.
- If you are an Israeli organization, you must have all documents in English and all financial statements in US dollars.
- If you have any questions about your organization's proposal, please call The Harry and Jeanette Weinberg Foundation at 410-654-8500 and ask to speak to the Program Director assigned to your grant application, or check www.hjweinbergfoundation.org for their contact information.

Please mail one copy of the proposal with the required attachments to:

The Harry and Jeanette Weinberg Foundation
Attention: Name of your Program Director
7 Park Center Court
Owings Mills, MD 21117

SECTION I: Introduction

A. Title Page

- ☐ The **title** of your organization's project.
- ☐ The **name** of your organization.
- ☐ The **submission date** of the proposal.
- ☐ The **amount** of the grant request and total project cost.
- ☐ Complete **contact information**.

SECTION II: Grant Request

PLEASE KEEP THIS SECTION (A-G) TO TEN PAGES OR LESS.

A. Summary

- ☐ **Briefly describe the organization and project goals, objectives, methods, and the benefits** (direct services) to the disadvantaged people in your community.
- ☐ **Include the amount of the grant request** and the period of time over which the grant payments would be made.

B. Capital Project Description

- ☐ State the **project's objectives** in measurable, achievable terms.
- ☐ **State the issue or need to be addressed**, describe the size and/or severity of the issue or need, and explain the evidence demonstrating the importance of this issue or need.
- ☐ **Describe the program** and services to be provided in the completed capital project.
- ☐ Please provide information on the **target population** served by this request and the number of individuals expected to be served, annually, upon completion of this project.
- ☐ **Discuss the anticipated results (outputs and/or outcomes) for the request.** Explain how the capital project directly and/or indirectly addresses the issue or need and supports the achievement of these results.
- ☐ State whether this capital project is for the **purchase, construction or renovation** of a building or for the **purchase of major equipment**.
- ☐ **Include a description of project financing**, if applicable.

C. Project Relevance

- ☐ Tell us **how your organization's project will help to alleviate poverty** in your population.
- ☐ **Confirm with valid data** that your organization provides direct services that mostly benefit people whose income is below the median income in the community or metropolitan area in question.
- ☐ **Describe how this capital project will enhance the organization's ability to provide direct services.**

D. Potential Challenges and Contingency Plans

- ☐ Describe any **potential challenges** you may encounter in completing this capital project and alternative approaches or solutions to these challenges.

E. Organization's Resume

- ☐ Provide the organization's **official mission statement**.
- ☐ **Tell us about your organization's qualifications.** Demonstrate that your organization has the institutional capacity and capability to achieve its objectives by mentioning the expertise of your organization's staff and volunteers, previous work in your field, the size and age of your organization, your organization's facilities and resources, and anything else that demonstrates excellence in your organization's discipline. Mention your organization's credibility recognized by others: state licenses, accreditation, awards.
Let us know if your organization has received previous support by the Weinberg Foundation. Please include a brief history of your organization.
- ☐ **List formal partnerships** with other nonprofit organizations that provide similar or collaborative services in your community.
- ☐ **What other organizations are doing work similar to your organization's work in your geographic area?**

F. Monitoring and Evaluation

- ☐ **Please describe how your organization assesses its overall success and effectiveness.** What evaluation tools do you use? How are the evaluation results being used? If applicable, include results from recent evaluation reports.
- ☐ **Briefly describe how you will monitor the success of the capital project.** Provide specific benchmarks that you plan to reach and provide a defined timeline. *For example: Complete value engineering by 3/09; Begin demolition by 5/09; Begin construction by 8/09.*

G. Financial Information

- ☐ What is your plan for a building maintenance reserve?
- ☐ **Is there a charge for services** your agency provides to clients? If yes, explain.
- ☐ Please state your organization's fiscal year.



SECTION III: Additional Information

A. Signatures

- ❑ Your **agency's Executive Director** (not the Development Director) and the **President of your agency's Board of Directors** must sign on the last page of this application.

B. Attachments

- ❑ **Resumes and job responsibilities** of the top three program responsible staff at your organization.
- ❑ A copy of your organization's previous fiscal year's **organizational budget**, a copy of your current fiscal year budget, and a copy of your next fiscal year budget.
- ❑ **Project Budget:** Provide a detailed, line-item budget for this project. What institutional commitment can you make to this project (internal funds from your organization or in-kind donations, i.e., tangible assets such as computers, salaries, etc.)? Itemize major purchases by category. If you have personnel charged to the project, please explain their roles.
- ❑ **List of all pledged and pending funding for this capital campaign in tabular form with the following columns:**
 - (a) **identify** if the funder is individual, corporate, foundation, or government;

- (b) **date of pledge;**
- (c) **payout period** of pledge;
- (d) **amount** of pledge;
- (e) **amount of actual payments** received to date; and
- (f) **balance owed.**

Please provide totals for columns (d) - (f). All single pledges below \$5,000 should be cumulated in a single row, stating in column (a) the number of such small pledges and leaving columns (b) & (c) blank. Please follow table format below.

- ❑ **Copy, if available, of value engineered plans** and examples of resulting changes or signed contract with builder.
- ❑ **Demonstrate site control:** does your organization own land and building? If not, explain lease arrangements.
- ❑ Your organization's **audited financial statements** for the past two completed fiscal years. If non-audited, then please explain.
- ❑ The **complete, unedited Form 990 filings** for the past two completed fiscal years for which you have filed. If a filing was due but was not filed, then please explain.
- ❑ The most recently published **Annual Report.**
- ❑ **List of Board Members** - their names, affiliations, and roles they play in your organization.

Example of how table should be formatted.

a	b	c	d	e	f
Name of Funder (Corporate, Foundation, Government)	Date of Pledge	Payout Period	Pledge Amount	Payments Rec'd to Date	Balance Owed

example



Capital Grants Documentation Form

The final step in the Capital Grant Proposal is completion of the capital grants documentation form. While this form will take additional time to complete, it will help the Foundation staff and Trustees more carefully review your request and understand the details of the capital expenses, fundraising efforts, and specific plans.

1. **Please list Governmental funding**, whether outright grant, tax-free bond issuance, tax credit financing, and/or for commercial borrowings / debt, or any other borrowing. Please provide copies of the documentation from the governmental authorities, banks, or other lenders. If you already have received one or more challenge grants for the Capital Project, then please send a copy of each such agreement or award letter.
2. **What short-term construction loans** does your organization have to cover the pledges?
3. **Please list all opportunities for naming recognition** at various donation amounts. If any naming recognition has already been assigned, then show which ones have been assigned and to which donors.
4. Please **complete the Capital Data Sheet below**, which will provide the Foundation with the information needed to draft a capital project agreement if your project is reviewed favorably and funded:

Capital Grants Documentation Form		
1	Grantee Organization Legal Name:	
2	Charitable status and incorporating jurisdiction:	
3	Grantee Organization Address:	
4	Grantee B (if applicable)	
5	Charitable status and incorporating jurisdiction:	
6	Address of Capital Project:	
7	Brief description (what is being done):	
8	Amount of existing space at Capital Project: <i>If land, specify acreage. If building, specify sq. footage</i>	
9	Amount of existing space to be renovated: <i>If land, specify acreage. If building, specify sq. footage</i>	
10	Amount of new space to be created-constructed:	
11	After completion of Capital Project, amount of total space (both renovated and new):	
12	Owner of the land:	
13	Owner of the existing building:	
14	Owner of building after Capital Project is completed:	
15	Total cost of Capital Project renovation and new construction:	
16	Targeted Geographic Area to benefit from Capital Project:	
17	Anything special or unusual that must be in a formal agreement if the capital grant is approved? (<i>leases, transfer of titles, pending law suits, etc.</i>)	

