

## **FUNDING APPLICATION GUIDELINES**

The Houston Foundation Trustees are interested in understanding your organization and how it contributes to our community. Below are a few areas of interest to assist in the written proposal. (\*Please note PROCEDURE below)

### **THE PROPOSAL**

1. Information that will help the trustees understand your Organization:
  - a. Brief history. When, why and by whom agency was founded. Changes and major accomplishments over the years.
  - b. Overview of current services, programs and clients served.
  - c. Board structure.
  - d. Major areas of Board involvement.
  - e. Meeting frequency of Executive Committee and Board. Include attendance records.
  - f. Board member compensation from the requesting organization as employees, consultants, vendors or others.
  - g. Objectives for next the 2-5 years. The written strategic plan.
  
2. Explanation of the specific request:
  - a. Purpose, nature and need for proposed project or service.
  - b. Context - how agency efforts fit within overall community problem and response.
  - c. Project or program objectives and the evaluation of resulting performance.
  - d. Service delivery plan, including timetable and staffing information.
  - e. Itemized project budget. Percentage of time and salary of assigned personnel.
  - f. Funding sources.
  - g. Plans for continued funding.

### **\*PROCEDURE**

1. Download the [Eligibility Questionnaire](#) and [Funding Request Form](#) from the website.
  
2. Submit the following to [HoustonFoundation@houstontx.gov](mailto:HoustonFoundation@houstontx.gov)
  - a. Short cover letter, signed by the Executive Director and Board Chairman.
  - b. Eligibility Questionnaire
  - c. Funding Request Form
  - d. The agency proposal, including detailed project budget, (not to exceed five pages) and
  - e. Supporting documents **(AFTER SUBMISSION of the Funding Request Form and funding proposal; only upon request of the Trust and Funds Management Staff)**

## **SUPPORTING DOCUMENTS**

1. Articles of Incorporation, Organization charter - not necessary if submitted previously and unchanged.
2. IRS status determination.
3. Most recent IRS form 990 with Schedule A and Attachments.
4. Organization chart.
5. Name, address & phone number of Officers and Board of Directors.
6. Job descriptions and resumes of three key staff associated with project or agency.
7. Most recent financial statement (audited, if possible).
8. Current operating budget, planned and actual if available.
9. Budget for year for which funding is sought.
10. Printed brochures, annual reports, flyers, if available.

## **THE REVIEW PROCESS**

1. Examination of written materials
2. Possible site visits and interviews of staff members
3. Possible visit to observe programs in action
4. Possible follow-up phone calls to staff, board members, and other individuals associated with or that have knowledge of the requesting organization