

San Angelo Area Foundation Grant Policy & Guidelines

OBJECTIVES

As a community foundation, the San Angelo Area Foundation does not limit its discretionary grant making to a particular field or area of interest. Rather, it seeks to support the entire range of human needs in the San Angelo area. This policy addresses discretionary grants which are made from the earnings (total return) of the *Unrestricted* Funds and *Field of Interest* Funds.

Because the Foundations' resources are limited, the Directors are required to make judgments based on relative need and potential impact. **Preference is given** to applications that:

- Enable charitable agencies to perform essential services that reduce costs, increase efficiency, become more self-sufficient, and strengthen internal management capabilities;
- Demonstrate strong volunteer involvement and broad community support and significantly strengthen the capacity of existing institutions to reach a broader segment of the community;
- Are developed in consultation with other agencies and planning groups and those that promote coordination, cooperation and sharing among organizations and eliminate duplication of services.

Each year the Foundation will receive more worthy requests than can be supported from its discretionary grant funds, therefore, the Board of Directors normally **will not** consider:

- A proposal from an organization that has been awarded within the last year. (For example, if a grant was approved and awarded in spring of year one, then the organization must wait until at least the spring of year three before submitting a new grant request);
- A proposal that has been declined within the last year, unless there has been a significant change in the request;
- A proposal from an organization that has not submitted a full report of a previous grant award, if required by the terms of the grant agreement.

GRANT MAKING POLICIES

In general, the Foundation **will not** grant, from funds designated as unrestricted, to the following types of organizations or projects:

- Political lobbying or legislative activities.

- Establishment or enhancement of endowments.
- Religious organizations, more specifically if limited to the benefit of a single congregation or cohort.
- Debt retirement, deficit financing, reduction of an operating deficit or liquidation of debt, or replenishment of resources used to pay for such purposes.
- Annual appeals, including courtesy advertising, sponsorships, benefit tickets, telephone solicitations. General solicitation letters will not be acknowledged.
- Umbrella funding organizations for distribution of the requested funds at their own discretion.
- Organizations located outside the San Angelo area (Map Attached)

ELIGIBILITY REQUIREMENTS

To be eligible for funding the applicant organization must:

- Be a 501(c)(3) nonprofit organization as defined in Section 509(a)(1) and/or Section 170(b)(1)(a)(vi) or Section 509(a)(2) of the Internal Revenue Code, or affiliated with a nonprofit organization, or a governmental unit. Individuals are not eligible applicants.
- Use grant funds within and for the benefit of residents and communities of the 17 counties of the San Angelo Area. (Map attached)
- Provide annual audited financial statements conducted by an independent CPA if the annual operating budget is \$500,000 or more. If under \$500,000 in annual operations, properly presented and prepared financial reports are still required.

GRANT MAKING FUNDING CYCLES

The Foundation will have two grant funding cycles for discretionary grants each year.

- Grant requests must be submitted by March 1, or September 1, each year.
- After initial vetting by staff and review by the Grants Committee, additional information may be requested by the Foundation.
- The Grants Committee will meet to review grant applications for each cycle and will recommend any grant awards at the May and November board of directors' meetings, respectively. Awards will occur as outlined in the signed agreement, if it has been determined by the foundation the agreement is necessary.

GRANT SEEKERS GUIDELINES

The Grants Committee of the Foundation will review grant requests each funding cycle as outlined above. The entire request is submitted online via the Foundation's web-site.

Grants Committee Responsibilities

The Board of Directors of the Foundation will utilize a grants committee to review grant proposals and make recommendations to the Board of Directors for grant awards. The grants committee may from time to time create other committees to assist the grants committee in evaluating grant proposals for various funds. This committee would be appointed by the grants committee chairperson in consultation with the Board of Directors and would serve at the discretion of the grants committee. This committee would have the same responsibility as the grants committee in reviewing grant requests and would make recommendations to the grants committee as to grant awards. All grant awards recommended by the grants committee require the approval of the entire Board of Directors of the Foundation.

Administration of Grants

If a grant is awarded to a grant seeker, the grant seeker will be required to submit documentation to the Foundation, in accordance with the signed agreement. The foundation will determine if a grant agreement is necessary and communicate that to the organization. Awards cannot be processed until the required documentation per the agreement has been submitted to the foundation. If an organization fails to return the agreement or meet the terms listed in the signed grant agreement, the grant will be rescinded. Consideration for exceptions to this policy will be considered on a case-by-case basis by SAAF.

Grantee locale

The Board of Directors of the Foundation will normally only entertain discretionary grant requests from the counties the Foundation serves: Tom Green, Crockett, Sutton, Kimble, Mason, Llano, San Saba, Menard, Schleicher, Reagan, Irion, Concho, McCullough, Runnels, Coke, Sterling, and Glasscock, which are highlighted on the next page, unless specific fund agreements permit exceptions. Further exceptions to the service area may be considered if the organization can provide detailed reporting of services provided to residents of the counties listed.

