



PROCEDURE FOR SEEKING A GRANT FROM THE CHURCH OF BETHESDA-BY-THE-SEA:

1. All information regarding the submission of a grant may be found in these guidelines. Any particular questions may be addressed to the Bethesda-by-the-Sea (BBTS) Outreach Coordinator via e-mail at turia@bbts.org. Please allow at least five business days for a response.
2. Any agency seeking a grant should submit a completed application which adheres to the "Funding Criteria" format set forth below. ***The submission deadline for applications this year is IN HOUSE by 5:00 p.m., Friday, November 30, 2018.***
 - a. Applications may NOT be e-mailed or faxed.
 - b. Applications must be mailed or hand-delivered to:

Turia Roebuck-Hayden
The Episcopal Church of Bethesda-by-the-Sea
141 South County Road
Palm Beach, Florida, 33480

Two complete copies are required: one paper copy and one CD/DVD containing the entire application in MS WORD and PDF format for review electronically. The paper copy may NOT contain bound reports, notebooks, or bindings of any fashion. (This applies to all parts of the paper copy report including tax reports, etc.)

ELIGIBILITY CRITERIA

To be initially eligible for funding, an agency must be incorporated as a not-for-profit company and have IRS 501(c)(3) status. ***An agency's application must include a copy of its IRS 501(c)(3) tax status, its latest IRS 990 return, an auditor's report and a management letter.*** If the agency has not been required to submit an IRS 990 return due to total budget value, this must be stated in the application.

Regardless of 501(c)(3) status, funding will NOT be approved for any application which the Committee, in its sole discretion, finds: (a) is for general fundraising, (b) is for endowment, (c) might allow the agency to become dependent, (d) ***does not meet an addressed need (education, food, shelter) primarily in Southeast Florida or Palm Beach County,*** or (e) capital campaigns.

FUNDING CRITERIA

Every application must contain a **COVER SHEET** with the following information in the following format:

Legal Name of Agency followed by acronym or common name:

Current Address and Phone number:

Website address:

Name of contact:

E-mail address of contact:

Telephone number of contact:

Name of CEO:

E-mail address of CEO:

Telephone number of CEO:

Name of Executive Director:

E-mail of Executive Director:

Telephone number of Executive Director:

Addressed Need (**circle only one**): Education, Food, or Shelter

Program name and concise description of program for which funds are sought:

Identify by year and amount Bethesda grants previously received or if applicant is a first time applicant please state so:

Amount of request:

Program budget:

Agency budget:

Are you a First Certified non-profit?

Salaries and titles of top five agency wage earners:

An application must then address the following questions in identical question and answer format in full with accompanying text and/or tables attached. All information must be current. Dependent upon an agency's fiscal year, the information must not exceed two calendar years; e.g. in calendar year 2018, all information submitted must be for fiscal year 2016 or 2017. Attachments shall be clearly labeled to indicate the application they supplement. Additionally, each page of a Grant application shall bear a header clearly identifying the application, the submission date and the addressed need category (education, food or shelter) and each page shall also contain a footer identifying the individual page and the total pages of the submittal.

AGENCY

- 1.1 What is the agency's purpose and when was it founded?
- 1.2 Who is served, where, and how many?
- 1.3 How is the agency staffed? (attachment required)
- 1.4 Who is on the Board of Directors? (attachment required)
- 1.5 What other agencies provide similar services?

PROGRAM

- 2.1 What is the program for which you are requesting funds?
- 2.2 How long has this specific program been in existence?
- 2.3 Who will be served, where, and how many?
- 2.4 How will the program be implemented/staffed:
- 2.5 How will the results/outcomes be measured?
- 2.6 Are there similar services in the county and what are they?
- 2.7 How will the program equip people to help themselves and address unmet needs in Palm Beach County/Southeast Florida?
- 2.8 Does the program demonstrate a collaborative effort with other agencies and/or provide goods or services that strengthen the ability of existing agencies to reach a broader segment of the community? Please elaborate and give examples.

BUDGET

- 3.1 What is the agency's annual budget? (attachment required)
- 3.2 What is the budget for the specific program? (attachment required)
- 3.3 What amount is requested and for what specifically?
- 3.4 If the request is granted, when would you use the funds?

FUNDING

- 4.1 What are the agency's major sources of funding?
- 4.2 To what other funding sources did you apply in the past fiscal year and what were the outcomes?
- 4.3 To what other funding sources are you applying to fund this particular program?
- 4.4 Has your agency applied to Bethesda-by-the-Sea before and what was the outcome?
- 4.5 Does your agency conduct fund-raising activities other than general appeals and grant requests? Please explain what they are and the percentage they add to the total budget.

APPLICATION REVIEW

1. After an agency application has been received and if it is approved for initial eligibility and site review, a representative from the Committee will contact the agency to schedule and perform a site review. The site review is a critical part of the review process. Due to the volume of grant requests, this part of the process may take several months.
2. After site review, the **representative** will report back to the Committee, which then shall determine in its sole discretion whether or not to recommend the application for funding—and if so recommended—for what amount. As a general rule, first time grants are limited to \$5,000 or less. No grant for funds in excess of \$30,000 will be made.
3. In May 2018, the church approved and funded less than 20 agencies. This was significantly less than in the past. Going forward, the number of funded agencies will be reduced each year as we work towards a more manageable number.
4. Bethesda Impact Project for 2018–2019: In keeping with our Strategic Plan, the church is looking for **ONE** or **TWO** major projects this year that must fall clearly within the Education or Shelter categories only. This project should be new to the community and must have the ability to accomplish demonstrated quantitative positive impact on the population served. The major details are as follows:
 - a. Funding for this project can exceed the normal maximum limit of \$30,000, but cannot exceed \$50,000.
 - b. Only **35% or less** of the 2017–2018 Impact Project can be utilized for salaries/personnel/benefits, fixed asset or utility expenses. Funding for these expenses will need to come from other sources.
 - c. The program must utilize the community at large in its endeavor with comprehensive details included in the grant application.
 - d. The program must embrace collaboration and detail those partners in the grant application.
 - e. All guidelines as laid out on pages 2 and 3 of this document apply.
 - f. Only two major projects will be considered. If no submitted project is deemed acceptable to the Committee, no 2019 Impact Project grants will be awarded.
 - g. For all other applications, no grant for funds in excess of \$30,000 will be made.
5. All applications which the Committee recommends for funding will then be submitted to the Vestry of Bethesda-by-the-Sea which in its sole discretion may approve, disapprove, or amend the actions of the Committee. Decisions on grant requests **WILL NOT BE ANNOUNCED** until the second quarter of the calendar year following grant application submissions. (April or May 2019)
6. All funding grants approved by the Vestry will be distributed the month following Vestry approval.
7. Funds are for use only in the twelve-month period beginning on the date of the agency's receipt of funds.
8. All agencies which receive funding must submit a quarter-year (3 months) financial report regarding the status of the use of granted funds which shall be submitted no later than the last day of the second month following the close of the third month since Bethesda funds were received. The report shall be quantitative as well as qualitative. Any agency which fails to provide an accounting report will be ineligible for any subsequent funding consideration. Mail your quarter-year (3 months) financial reports to the address outlined in (2b) on page 1 of this document.