

HAYSWOOD FOUNDATION, INC.

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2018 GRANT APPLICATION INSTRUCTIONS

Hayswood Foundation, Inc., makes grants to non-profit organizations located in, or benefiting the public in, a seven-county area that includes Bracken, Fleming, Lewis, Mason and Robertson Counties in Kentucky, and Adams and Brown Counties in Ohio. The purpose of the grant must be to promote education, or mental or physical health. **Only those organizations recognized by the Internal Revenue Service as able to receive tax-deductible contributions from individuals are eligible for consideration. Preference is given to organizations qualifying under Section 501(c)(3).** Schools must be accredited, and must provide written evidence that accreditation is current.

Grants will not be made for programs or purposes involving political indoctrination or action, or which predominately involve social or religious indoctrination or action. Grants are not made to or for the benefit of individuals. No portion of any grant may directly benefit any officer, director, or member of any recipient, except in a manner that would indiscriminately benefit other members of the class to be served. Grants will not be made for the purpose of funding endowment funds. **Preference is given to projects that do not benefit tax-supported entities. Funding will GENERALLY not be provided for projects that involve repairs, additions, or improvements to structures or real property not owned by the applying organization. The relative benefit to the applying organization, versus the benefit to the property's owner, will be considered, as will the existence of a long-term lease relationship.**

It is possible that a grant will be awarded on a conditional basis. These grants would require an organization to raise money from other sources to match funds received from the Foundation. Not all money received from other sources will qualify for the match (Specific requirements are available upon request, and on our website.). Grants for major capital purposes will be awarded on a \$1-for-\$2 conditional basis, only, and will be paid over a number of years, with the length of time dependent upon the amount, and other specific conditions of the request. Applicants may use a single application form to apply for multiple projects. However, if one of the projects is a major capital project, a separate application form should be used for that project.

Recipients of major capital grants of \$100,000 or more will be required to conduct special reviews of the use of granted funds at least every two years, with a final review conducted within 90 days of the date of the final distribution. The grant reviews must be performed by an independent, licensed public accountant, and copies provided to the Foundation.

Completed applications must be received in the office of Hayswood Foundation, Inc. no later than 5:00 p.m. on Wednesday, August 1, 2018. Applications will not be accepted after the deadline has passed. A completed application consists of the attached application form, plus all supporting documentation requested under the form's Items 20 and 21. For ease of completion, applicants may create their own application form, provided the item numbers and wording used on our original application are recreated in their entirety. Applications should be submitted in loose-leaf form, with information printed on one side of each sheet, only. Print must be in black or other dark ink. Applications must be signed by an officer or the Executive Director of the applying organization.

By submitting an application, the applicant acknowledges that Hayswood Foundation, Inc. may rely on the information being accurate and current as of the date stated. Any material misstatement will result in rejection, and any grant funds paid to that point, based on reliance on that misstatement, will immediately be refunded upon our notice to the applicant.

Distributions of awards to selected applicants should not be expected earlier than November 1, 2018. Once grant money is awarded to an organization, that money must be used for the purpose stated in the application, or a different purpose if prior approval is received from the Foundation. Money not used as stated or approved must be returned. Successful grantees will be required to account for all grant monies spent and/or restricted. Any funds received from other organizations for the same purpose must also be disclosed. No new grants will be made to any organization, or any successor organization, for a period of four years thereafter until such accounting and disclosure is provided. Questions about the application process should be directed to the phone number, or email address, above.

2018 HAYSWOOD FOUNDATION, INC. GRANT APPLICATION

Additional sheets may be attached if more space is needed for a response. Reference the item number(s) on all attachments. You may also create your own application form, provided the item numbers and sequence, and the text listed on this original application, are recreated in their entirety.

(1) Legal name of organization: _____

Address: _____ Website: _____

City: _____ State: _____ Zip code: _____ EIN: _____

(2) Contact person: _____

Address: _____

City: _____ State: _____ Zip code: _____

Telephone number: _____ Email address: _____

(3) Names and addresses of officers and executive director:

(4) Names and addresses of directors:

(5) Compensation of officers, directors, and all employees:

(6) Charitable purpose of organization:

(7) Does your organization operate on a calendar year or fiscal year? If fiscal, indicate the starting date.

(8) We believe it is important that the leadership of an organization fully support the organization's charitable purpose. In your last accounting year, approximately what percentage of your Board of Directors made voluntary donations (monetary, real estate, or investment securities, only) to your organization? ____%. The approximate total dollar amount of such contributions? \$_____

(9) How long has organization been in existence? _____

(10) Describe geographic area and number of individuals served by organization?

(11) Grant amount requested: \$ _____

(12) Will/has organization applied for this same grant to any other organizations or foundations? ___Y___N

(13) If you answered YES to question #12, please list all organizations or foundations to which you will or have applied:

(14) Purpose(s) for which this grant is requested:

(15) How will this grant benefit your service population?

(16) Does the purpose for which you are requesting funds involve repairs, additions, or improvements to or on property that your organization does not own? _____ If YES, does your organization have a long-term or other lease interest in the property? _____ If YES, provide a copy of that lease with your application documents, as well as any other information or explanation that you believe would be relevant to our consideration of your request.

(17) Will your project still be feasible if we grant only a portion of the funds requested in this application? Will you be able to raise matching funds if our Foundation provides you with a challenge grant?

(18) Describe your fundraising activities over the previous eighteen (18) month period, and include the net amount raised for each activity:

(19) Describe your planned fundraising activities for the upcoming twelve (12) month period:

(20) Attachments to this application form **must** include the following, if applicable:

- (a) Copy of determination letter from the Internal Revenue Service recognizing organization as tax exempt.
- (b) A list of the organization's current assets and their values, including bank accounts, investment accounts, and real estate, and the organization's current liabilities, signed by an officer or the Executive Director to attest accuracy;
- (c) A report itemizing the organization's individual receipts and disbursements (income and expenses) for the last two years (If this will create a report with an excessive number of pages, you may categorize the sources of income and types of expense for each of the two years, and show the total dollar amounts for those categories. If you have questions please call or email.);
- (d) A detailed statement of the use of any Hayswood funds granted to your organization during the past three years;
- (e) A detailed statement of the proposed use of funds requested in this application;
- (f) If the funds are to be used to purchase or pay for equipment or supplies, provide a detailed description of the equipment or supplies, including documentation to support the amount requested (invoice, price quote, copy of catalog listing, etc.); and
- (g) If the applying organization is a school, 1) provide written evidence of current accreditation, and 2) provide the number of students currently enrolled.
- (h) If the funds are to be used to repair, improve, or make additions to property that your organization does not own, and your organization leases the property, provide a copy of the lease.

(21) Discretionary attachments and presentation:

You may submit additional documentation to explain and support this grant request. You should also be prepared to appear before the Hayswood Grant Committee, if requested by the Committee, to make an oral and/or visual presentation to supplement this written application.

I certify, to the best of my knowledge, the accuracy of the information provided in and with this application.

Signature and Title of Organization's Chief Executive Officer or Executive Director

Typed/Printed Name

Date