

GRACE AND FRANKLIN BERNSEN FOUNDATION

Foundation Policies and Guidelines for Submission of a Grant Request

The Grace and Franklin Bernsen Foundation provides grants primarily within the metropolitan Tulsa area in support of religious, charitable, scientific, literary or educational purposes.

Funding Restrictions

- Grant requests will not be considered
 - if the requesting agency does not hold a 501(c)(3) public charity status from the IRS, or
 - if the required documents are not attached.
- Grant requests from individuals are not accepted.
- The Foundation discourages grant requests for general operating support or reduction of debt, or for continuing or additional support for the same programs, although a single grant may cover a period of several years.

Eligibility

- To be eligible for consideration by The Grace and Franklin Bernsen Foundation an organization must provide a copy of the determination letter from the Internal Revenue Service indicating that it is a tax-exempt organization as described in Section 501 of the Internal Revenue Code of 1986 and is treated as other than a private foundation as within the meaning of Section 509(a) of the Code.
- Grant requests for programs and projects that will provide a defined benefit such as capital projects, building programs, specific program needs or ongoing operations from time to time are all considered.
- Grant requests from elementary or secondary education institutions will be considered only if they involve programs for at-risk, handicapped or learning-disabled children; or if they are innovative and apply to all schools in the system.
- The Foundation will only review one grant request per agency during its fiscal year (October 1 to September 30).

THE GRANT APPLICATION PROCESS

- The applying agency should submit a narrative summary (in letter format) no more than three pages in length. This narrative summary letter should be addressed to the Trustees of the Foundation and signed by the agency's Chief Executive Officer. (See "**Submission Requirements**" below.)
 - Please do not use type smaller than 10.5 point.
 - DO NOT USE PARAGRAPH SUBTITLES IN YOUR SUMMARY. If a summary is received with subtitles, It will be returned.
- The narrative summary letter should contain the following:
 - the legal name of the organization and its current address and telephone number;
 - the name, title, telephone number and e-mail address of the person designated as the primary proposal contact;
 - a brief description of the organization and the proposed project in need of funding, including an explanation of its importance and a clear statement of its goal;
 - the amount of grant sought from the Foundation;
 - it should cite the financial need, including any other sources of funds; and
 - it should state how the agency plans to support the project after the grant period.
- After receiving a grant request, the Trustees may:

- schedule a site visit. Knowledge of the grantee is of critical importance in the approval process; or
- ask the grantee to provide a written assessment of any project the Foundation helps to fund.

PROPOSAL ATTACHMENTS

The following information should be attached to the narrative summary letter and all attachments should be in printed format. (Please do not submit grant requests in plastic covers, binders, or sheet protectors.)

- Documentation of the organization's non-profit and tax-exempt status from the Internal Revenue Service
- Project budget detail (if applicable).
 - If the request is for furnishings, equipment or construction, the agency will need to submit a detailed quote to support the request.
- A List of current Officers and Board of Trustees/Directors. (Please do not send bios of these individuals.)
- Most recent audited financial statement (or last year's IRS Form 990 filed and the last fiscal year's internal financial statement if audit is unavailable).
- Current year-to-date financial statements and budget.
- Any other relevant supporting materials. (Note: the Foundation does not need copies of Oklahoma tax documents, certificate of incorporation or Bylaws.)
- DO NOT include letters of support, DVDs, CDs, bound books or bulky leaflets.

TIME FOR FILING AN APPLICATION

- The Foundation's Board meets monthly to review grant requests.
- Grant requests are required to be in the Foundation's office no later than 12 o'clock noon on the 1st day of the month prior to that month's meeting. Grant requests received on or before the 1st day of the month (unless the 1st falls on a Saturday, Sunday, or a holiday, in which event grant requests are due on the preceding business day) preceding a next regularly scheduled Board meeting are normally considered at such meeting, provided that all required information has been provided.
- Grant requests may be made at any time for support of activities consistent with the Foundation's guidelines.

SUBMISSION REQUIREMENTS

- The narrative summary letter and supporting documents may either be hand-delivered or sent by regular mail to the following address:

The Grace and Franklin Bernsen Foundation
15 West 6th Street, Suite 1308
Tulsa, Oklahoma 74119-5407

- Send only "one" copy.
- **E-mail a copy of the narrative summary letter in Word format to gfbernsen@aol.com. The narrative summary should be e-mailed immediately and received in the Foundation's office before the grant request is received by the Foundation. (DO NOT email the full grant request, only the narrative summary letter.)**

Please direct any and all questions to Margaret Skyles at:

(918) 584-4711 (Phone)
E-Mail: gfbensen@aol.com

ANNOUNCEMENT OF DECISIONS

- Generally, the applicant will be advised of the Foundation's action on a grant request within a week following the Trustees' meeting.
- Board decisions on all grant requests are reported in writing by mail or personal visit.

GUIDELINES CHANGES AND EXCEPTIONS

Guidelines are subject to change, and exceptions to the guidelines may be allowed, at the discretion of the trustees. Applicants relying on this guidance may obtain a copy of all current guidelines by contacting the Foundation office.