

**GRACE AND FRANKLIN BERNSEN FOUNDATION**  
**GRANT REQUEST GUIDELINES (NOVEMBER 2015)**

The Grace and Franklin Bernsen Foundation (GFBF) provides grants in support of charitable, educational, literacy and religious purposes. Support is limited to organizations serving the metropolitan Tulsa, Oklahoma community.

**FUNDING RESTRICTIONS**

To be considered, grant requests must be:

- *Responsive to all foundation guidelines and*
- Submitted by an applicant tax-exempt under section 501(c)(3) of the Internal Revenue Service Code.

The Foundation discourages grant requests, from individuals, for general operating support, reduction of existing debt, or for programs previously supported by a GFBF grant. Multi-year commitments for significant projects are possible at the discretion of foundation trustees.

**ELIGIBILITY**

To be eligible for consideration, an applicant organization must provide a copy of the IRS, 501(c)(3) tax-exempt determination letter stating that the agency is treated as other than a private foundation within the meaning of Section 509(a) of the IRS Code.

Grant requests must demonstrate a defined benefit, describe the population to be served, indicate where proposed services will be provided, how, at what cost and how the proposed program will be evaluated. (e.g., who is going to do what to whom, where, when, at what cost and how well.) Capital, building and program funding are eligible for support. On-going operational requests are occasionally, but rarely considered.

Grant requests from elementary or secondary educational institutions will be considered only if they provide services for at-risk, disabled / learning disabled students or, if a well-documented and promising case be made for offering an innovative program that benefit all children in a given school or school district.

Applicants are limited to one request per year (October 1 – September 30).

**GRANT APPLICATION PROCESS**

*If the prospective applicant has questions about eligibility or the appropriateness of a request, a conversation with foundation staff is encouraged and welcome.*

- The applicant agency should submit a narrative summary, in letter format, and no more than three pages in length. Applications should use type no smaller than 11 point and have reasonable margins.
- This narrative letter should be addressed to “the Bernsen Foundation Trustees” and signed by the applicant agency’s Chief Executive Officer.

The narrative should contain the following:

- The legal name of the organization, its current address, telephone number and if available, web site address
- 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 a description of the clients intended to be served and the projects goal(s);
- The grant amount requested from GFBB;
- The case for financial need (budget), including other sources of funding on hand are being sought; and
- A description of how the applicant plans to support the project after the GFBB grant period.

After an initial review, the foundation may request additional documentation, arrange a meeting with the applicant and/or request a site visit. Understanding the agency, its clients, programs and achievements are critically important to the foundation and its review process.

### REQUIRED ATTACHMENTS

The following information / documents must be attached to the narrative letter. Please be sure the applicant's name appears on all pages of the application packet and please, *do not* submit requests in plastic covers, folders, binders, or sheet protectors. A simple binder clip is sufficient and preferred.

- A copy of the agency's IRS, 501(c)(3) tax-exempt determination letter
- A line item project budget. If the request is for furnishings, equipment or construction, the agency should sufficient detail and quotes to support its request.
- A list of current officers and board of trustees/directors. Please *do not* send biographical profiles.
- A copy of the agency's most recent audited financial statement (If the applicant does not have a certified independent audit, contact foundation staff to discuss this situation prior to submission of a request.)
- Current year-to-date financial statements and budget.
- Relevant supporting materials will be accepted if they speak directly to the proposal. The foundation does not need copies of Oklahoma tax documents, certificate of incorporation or agency bylaws.
- Please, *do not* include letters of support, electronic media, bound books, annual reports or bulky leaflets.

### TIMING FOR APPLICATIONS AND NOTIFICATIONS

- The Foundation's Board meets monthly to review grant requests. To be eligible for consideration, requests must be in the foundation office by 12 Noon on the first workday of the month prior to that month's meeting.
- Grant requests received on or before the first (unless the first falls on a weekend or a holiday, in which case, the request is due on the *preceding* business day) will typically be considered at the next regularly scheduled GFBB board meeting. *A timely review depends upon an application that is responsive to all foundation guidelines.*

### SUBMISSION REQUIREMENTS

The narrative letter application and supporting documentation may be hand-delivered or sent via the United States Postal Service to:

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

- Only one hard copy of the application is requested.
- The applicant should email a one-page abstract of its request prior to submitting a hard copy of the application package. The abstract should briefly address the “who will do what to whom, where, when, at what cost and how well” previously noted. The abstract should be submitted in WORD (or compatible) format to [apps@bernsen.org](mailto:apps@bernsen.org). The abstract should be emailed well in advance of sending the hard-copy application to the foundation. Please, do not email the full grant request and attachments. Only the project abstract is requested via email.

Please direct questions to:

David Zemel, Director  
Grace and Franklin Bernsen Foundation  
15 W. 6<sup>th</sup> Street, Suite 1308  
Tulsa, OK 74119-5407  
Phone: (918) 584-4711  
Email: [david@bernsen.org](mailto:david@bernsen.org)

#### **ANNOUNCEMENTS**

The foundation intends to advise all eligible applicants of the funding decisions approved at monthly meetings. Such notifications will be mailed to applicants within ten days of each session. Successful applications may also be listed on the GFBF website although typically, after applicants have been notified by mail.

#### **GUIDELINE CHANGES AND EXCEPTIONS**

Guidelines are subject to change and exceptions may be allowed, solely at the discretion of the trustees. Prospective applicants are invited to discuss these guidelines with foundation staff at any time in the request planning, development and review process.

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