

# 2020 Spring General Grant Application

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*Robert J. Kleberg, Jr. and Helen C. Kleberg Foundation*

## *Instructions and Executive Summary*

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This application is for all grant requests **except** medical research and animal medical research studies; use the '2020 Spring Medical Research Application' for all medical research requests. Contact Foundation staff if you are not sure which application to use.

Review the Grant Guidelines provided on the Foundation's website at [www.klebergfoundation.org](http://www.klebergfoundation.org) to ensure your organization and project qualify, and for instructions on how to apply. Please note the **geographic eligibility restriction for the Community Services category and eligibility criteria for the Arts and Wildlife categories.**

You can review the application questions and required attachments from the link 'Preview' on the application screen, or from the Logon page. Make sure to download and use the proper budget form that applies to your request. **Applications that upload a different project budget form will not be considered.**

**All questions and attachments with an asterisk (\*) are required** and must be answered and uploaded before you can submit. Questions without an asterisk are optional and should be answered if they apply. Answers are automatically saved and you do not have to complete the application in one session.

**Your application must be submitted by midnight CST on Tuesday, March 31, 2020. Late applications cannot be accepted.**

Contact Margret Bamford at [margretb@alexventures.com](mailto:margretb@alexventures.com) if you have questions, or call 210-271-3691. Email is preferred.

### **Executive Summary\***

Condense the content of this application into a short and **concise stand-alone summary**. This summary should consist of:

- An introductory paragraph that includes a brief history and the purpose of your organization.
- One to two paragraphs that summarize the proposed project, including who will be served and how, desired outcomes and impact. If requesting operating support, describe the agency's core programs.

This summary should make a persuasive case for funding.

*Character Limit: 2500*

## **I. Organization Background**

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### **Organization Name\***

Organization's full legal name, **as it appears on the IRS determination letter.**

*Character Limit: 150*

### **Other Name Used**

If you are using a different name, list this name here.

*Character Limit: 150*

### **Organization Verification\***

**STOP!** Please review and verify the organization and contact information for your account in the online system; make any needed corrections. By clicking Yes, you confirm that you have done so and that the information for this account is correct and up to date. Contact Margret Bamford at 210-271-3691 if you had problems making the needed changes.

#### **Choices**

Yes, the organization and contact information is correct.

### **Address Match\***

Is the address shown on your IRS Determination Letter the same as your organization's address as listed in your profile?

#### **Choices**

Yes

No

### **If No, please explain why the addresses are different.**

*Character Limit: 500*

### **Organizational Structure Changes**

Briefly explain any organizational structure changes, such as mergers, divestitures, name changes during the last 10 years, if any, otherwise leave this blank. This does not refer to internal restructuring of departments or programs, but only to corporate structure changes.

*Character Limit: 1000*

### **Mission\***

Succinctly state your organization's overall mission.

*Character Limit: 250*

### **Year Founded\***

*Character Limit: 4*

**History\***

Brief overview of the organization's history.

*Character Limit: 500*

**Organization Programs\***

Short description of your organization's purpose or programs.

*Character Limit: 650*

**Organization Budget\***

Organization's total board approved expense budget amount for the current fiscal year. Enter whole number.

*Character Limit: 20*

**Fiscal Year Beginning\***

*Character Limit: 10*

**Fiscal Year Ending\***

*Character Limit: 10*

**# Full Time Staff\***

*Character Limit: 10*

**# Part Time Staff\***

*Character Limit: 10*

**# Regular Volunteers\***

*Character Limit: 10*

**Total Clients Served\***

Provide the approximate total number of unduplicated clients **your organization** (not your project) **served last fiscal year** (count each client served only once regardless of how often that client received services during the year).

*Character Limit: 10*

**Requested By Name\***

The chief executive of your organization is required to sign the cover letter. This would be the President, CEO or Executive Director. Enter the name of the chief executive officer who will sign the request letter using this **format: Jane Smith**

*Character Limit: 150*

**Requested By Salutation\***

i.e.: Ms., Mrs., Mr., or Dr.

*Character Limit: 150*

**Requested By Title\***

Title of the chief executive officer who will sign the request letter.

*Character Limit: 150*

**FedEx Address\***

Enter the contact name, mailing address, and phone number for the person who could receive a FedEx delivery of an award letter and check, should a grant be awarded.

*Character Limit: 100*

## *II. Grant Request Information*

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**Project Name\***

This should be a very short, succinct and descriptive name - don't be cute, be explanatory.

*Character Limit: 70*

**Short Description\***

Short description of request. Please **complete the sentence**: Funds are requested to support

...

*Character Limit: 90*

**Amount Requested\***

Total amount of your request. If this is a multi-year request, provide the total amount requested for all years. Please note that the Foundation typically makes single-year awards and very rarely funds a project for more than 3 years. Please contact Foundation staff for guidance before submitting a request beyond three years.

*Character Limit: 20*

Provide the amount requested each year. Enter the number zero for the years for which you are not requesting any funding.

**Year 1 Request\***

*Character Limit: 20*

**Year 2 Request\***

*Character Limit: 20*

**Year 3 Request\***

*Character Limit: 20*

**Project Cost\***

Provide the **total cost** of the project (for the years of your request). Include only costs that are directly related to your project. Do not include indirect or administrative costs, or overhead allocations unless you are asking for operational support.

*Character Limit: 20*

**Begin Date\***

Beginning date of the grant period (when Kleberg Foundation funds will first be used for this project).

*Character Limit: 10*

**End Date\***

Ending date of the grant period (when Kleberg Foundation funds will have been spent for this project).

*Character Limit: 10*

**Project Address\***

Is the physical address where the project is being carried out the same as the organization address above?

**Choices**

Yes

No

**If No, please provide the address where the project is being carried out.**

*Character Limit: 250*

**Request Type\***

Select the category that best describes your request.

**Choices**

Operating or Core Program

New Program or Project

Capital - Construction of Medical Facility

Capital - Other Construction Project

Capital - Equipment Only

Capital - Renovations

**South Texas\***

Does your project **primarily serve communities that are more than 75 miles South of San Antonio**? Please make sure you meet the Foundation's eligibility requirements listed on the Foundation's website at [www.klebergfoundation.org](http://www.klebergfoundation.org) before you continue.

**Choices**

Yes

No

## Geographic Area\*

Describe the geographic area that will be served by your project. If your project will serve clients located in Kleberg, Nueces, Jim Wells, Brooks, or Kenedy counties, please list the number and % of clients located in each of these counties.

*Character Limit: 300*

## Population Served\*

Please check the **primary** population served by your program/project.

### Choices

General Population

Families

Women only

Men only

Pre-K Children

K-12 Children

College Students

Seniors

Homeless

Animals

Special Needs Population, describe

## If Special Needs Population, please describe

*Character Limit: 300*

## Focus Area\*

Which of the Foundation focus areas does your application address? Check one only.

### Choices

Arts and Humanities

Community or Social Services

Education (Higher Ed)

Education (K-12)

Health Services

Medical Research, Including Animal Medical Research

Wildlife, Conservation and Animal Science

None

If you checked *Medical Research*, **STOP**, you should not be using this General application form, instead use the Medical Research Application Form. If you checked *None*, **STOP**. Contact Margret Bamford for eligibility at [margretb@alexventures.com](mailto:margretb@alexventures.com) or call 210-271-3691.

### III. Grant Details

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#### Narrative\*

Please provide your proposal details including information on the main issues or problems this grant request addresses and details on why and how you plan to address these issues. Please be concise. You do not need to repeat information you already provided above. *(This is your opportunity to make a persuasive case for support!)*

*Character Limit: 6000*

#### Number of Clients Served by Project\*

Provide the approximate total number of **unduplicated clients that will be served during the grant period by your proposed project**. Count each client only once regardless of how often that client receives services. For operational requests, this is the total number of unduplicated clients your agency serves a year.

*Character Limit: 10*

#### Clients Served Details

Provide details of the number of unduplicated clients served by client or service type, if applicable (e.g.: total number is 100, which consists of 35 mothers and 65 children OR total number is 100, of which 73 will participate in program1 and 27 will participate in program2).

*Character Limit: 750*

#### Volunteers

Describe how you will use volunteers with this project and how many, if applicable.

*Character Limit: 500*

#### Project Collaboration

Describe other organizations with whom you will collaborate on this project and how, if any.

*Character Limit: 500*

#### Implementation Timeline

Please describe the implementation timeline related to this request, if applicable. Include major events, activities, and when they will take place *(bullet points and in chronological order)*.

*Character Limit: 1000*

#### Goals\*

List your goals for this project. There is no expected number of goals, list what makes sense for your project. Please **number your goals**. Each of your goals should be **specific, measurable, and include target numbers**. If your request is approved, you will be asked to evaluate how well you have met each of your listed goals in the Evaluation Report at the end of each grant year.

*Character Limit: 2000*

## Key Staff

Names and titles for key staff and their involvement in the project, as appropriate.

*Character Limit: 1000*

## IV. Budget

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### Organization Current Budget Explanation

You will be asked to upload your **organization's BOARD APPROVED revenue and expense budget** for the **current fiscal year**. Please explain any unusual items, special considerations, or categories that are not self-explanatory. Also explain why your budgeted Net Income is not zero, should that be the case.

*Character Limit: 1000*

Download and complete the **project budget** file provided for this application. **DO NOT SUBMIT A DIFFERENT PROJECT BUDGET FORM as your request will not be considered if you do.**

There are four project budget files to choose from. Make sure to choose the file that applies to your request. The four files are:

1. **Capital Project Budget Form** - choose this if you are requesting support for a capital project, regardless if this is a one-year or multi-year request.
2. **Non-Capital Single-Year Project Budget Form** - choose this for all other requests that are for one year of funding.
3. **Non-Capital Multi-Year Project Budget Form** - choose this for all other requests that are for more than one year of funding.
4. *Medical Research Project Budget Form - do not use this form.*

Click **HERE** to download your Budget Form.

Complete entirely both the '**Project Budget**' and the '**Other Funders**' worksheets included in the excel project budget file. Contact Foundation staff if you are not clear on how to complete the project budget.

### Project Budget Explanation

Please explain any unusual items, special considerations or categories that are not self-explanatory as they relate to your **PROJECT revenue and expense budget**, if any. Make sure to include both **revenue** and **expense** projections for your project in the budget file (except for Capital projects). Explain here how you will close the gap if your Net Income is not zero.

*Character Limit: 2000*



## Project Funding

The 'Other Funders' worksheet in your project budget file asks you to list the names of other organizations you have asked for support, the amounts requested, and any commitments received. Please make sure that you have completed that worksheet. Provide additional information here if applicable.

*Character Limit: 2000*

## Project Sustainability

Describe your plans to support and sustain this project after the end of this grant, if applicable.

*Character Limit: 750*

## VI. Attachments

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### Cover Letter\*

A short cover letter **signed by the chief executive** of the organization in pdf format that includes a concise description of the request and amount requested. For funding requests from *institutions of higher education*, the letter should be signed by the provost, chancellor, president or executive vp-research.

*File Size Limit: 2 MB*

### Board List and Affiliations\*

A list of your current board members and their affiliations.

*File Size Limit: 1 MB*

### Board Approved Budget for your Organization\*

Upload your organization's board approved **revenue** and **expense** budget for your **current** fiscal year.

*File Size Limit: 1 MB*

### Board Meeting Minutes\*

Please upload a pdf copy of the minutes from the board meeting at which your current organizational budget was approved.

*File Size Limit: 1 MB*

### Project Budget and Other Funder Information\*

Upload the completed **project budget** file (**revenues** and **expenses**) you downloaded in the Budget section of this application. Make sure you complete both the project budget and the other funders worksheets. **DO NOT UPLOAD A DIFFERENT PROJECT BUDGET FILE.**

*File Size Limit: 2 MB*

### Most Recent Financial Statements\*

Upload a copy of your **most recent audited financial statements**. Only if audited financial statements are not available, upload a copy of your most recent Form 990. For *institutions of higher education*, financial statements are not required and only a note indicating you are an institution of higher education needs to be uploaded.

*File Size Limit: 12 MB*

### Previous Year's Financial Statements

Upload a copy of your previous year's audited financial statements unless that information is already included in your most recent audit. Only if audited financial statements are not available, please upload a copy of your Form 990 for the previous year. For *institutions of higher education*, financial statements are not required.

*File Size Limit: 12 MB*

### IRS Ruling\*

A copy of the IRS ruling or determination letter (see grant guidelines on our website for details).

*File Size Limit: 2 MB*

### Organizations Doing Business Under Another Name

If your organization is doing business under another name than its legal name, a pdf copy of the documentation from the applicable state/government entity, generally the secretary of state's office, recognizing the d/b/a name.

*File Size Limit: 1 MB*

### Construction Plans

**For construction projects only**, you may upload a scan copy of architect renderings or schematics to show the design and scope of your project. Please scan these documents into one file to upload.

*File Size Limit: 1 MB*

### Other Supporting Materials

You may upload one scan copy of any additional materials you think are important in explaining your request, such as request-related pictures, etc. **PLEASE DO NOT INCLUDE COPIES OF YOUR ANNUAL REPORT OR ANY MARKETING MATERIALS OR BROCHURES** as those will be disregarded.

*File Size Limit: 5 MB*

**THANK YOU FOR YOUR TIME AND EFFORT IN COMPLETING THIS APPLICATION!**

**Your request will be considered at the June 10, 2020, board meeting. You will receive an email no later than June 12 notifying you of the board's decision.**

