



# CAROL M. JACOBSON FOUNDATION

c/o Henry N. Libby, President \* 2820 SE Dune Drive, Unit 2306 \* Stuart, FL 34996  
443-994-1341

## APPLICATION FORM

### I. PROPOSAL SUMMARY: (One-half page, maximum)

Please summarize in a brief paragraph the purpose of your organization. Briefly explain why your organization is requesting this grant or Program-Related Investment (PRI), what outcomes you hope to achieve, and how you will spend the funds if a grant is made.

### II. NARRATIVE: (Five page maximum)

#### A. Background – Describe the work of your organization, addressing each of the following:

- i. A brief description of its history and mission.
  - a. The need or problem that your organization works to address, and the population that your organization serves, including geographic location, socioeconomic status, race, ethnicity, gender, sexual orientation, age, physical ability, and language.
  - b. How your program will solve the need or problem.
- ii. Current programs and accomplishments. Please emphasize the achievements of the recent past.
- iii. Number of full paid staff; number of part-time staff; number of volunteers.
- iv. Your organization's relationships-both formal and informal- with other organizations working to meet the same needs or providing similar services. Please explain how you differ from these other agencies.

#### B. Funding Request – Please describe the program for which you seek funding.

- v. If applying for general operating support, briefly describe how the grant would be used.
- vi. If your request is for a specific project, please explain the project including:
  - a. A statement of its primary purpose and the need or problem that your organization is seeking to address.
  - b. The population that you plan to serve and how this population will benefit from this project.
  - c. Strategies that you will employ to implement this project.
  - d. What metrics you will use to show results and the effectiveness of the program.
  - e. The proposed staffing pattern for the project, and the names and titles of the individuals who will direct the project.
  - f. Anticipated length of the project.
  - g. How the project contributes to your organization's overall mission.

C. Program-Related Investment - If your organization is seeking a PRI please describe strategies and sources for repayment.

D. Evaluation – Please explain how you will measure the effectiveness of your organization’s activities. Describe your criteria for a successful program and the results you expect to have achieved by the end of the funding period.

III. ATTACHMENTS – Please label all attachments to correspond to the bold-faced, capitalized items below.

A. Financial Information – Please provide the dates that each document covers.

- i. The organization’s Financial Statements, audited if available, for the last three years. This statement should reflect actual expenditures and funds received during the most recent fiscal year.
- ii. Aligned side by side on the same page, the organization’s Operating Expense Budgets for the current period and the past three fiscal years.
- iii. Aligned side by side on the same page, a list of organization's corporate supporters and all other sources of income, with contribution amounts, for your current and past three fiscal years.
- iv. Please list the foundations, corporations and other Sources that you are Soliciting for Funding and, to the best of your knowledge, the Status thereof Of Your Proposal with each.

If project funding is requested:

- v. Current Expense Budget for the Project. List each staff line separately and include the percent of time spent on the project. Indicate the specific uses of the requested grant to the extent possible.
- vi. A list of all Sources of Income committed toward the project, actual and prospective with amounts.

B. Other Supporting Materials

- vii. A list of your Board of Directors with their affiliations, and amounts contributed by each Board Member within the current fiscal year and the past three fiscal years.
- viii. A copy of your most recent IRS letter indicating your organization’s tax-exempt status, or, if not available, an explanation or other evidence thereof.
- ix. Describe how often the Board of Directors meet, each member’s jobs or committees, and percentage of meetings attended during the present and past three fiscal years.
- x. One paragraph resumes of your key staff, including qualifications relevant to the specific request.
- xi. The organization’s most recent annual report, if available.
- xii. No more than three examples of recent articles about, or evaluations of, your organization, if available.
- xiii. Copies of the Form 990 for the past three fiscal years.