



Capital Project Grant Proposal

The Trustees of The Harry and Jeanette Weinberg Foundation invite your organization to submit a complete capital grant proposal. Please follow these instructions and the page limits carefully. **Only one copy of the materials is requested. Please do not bind materials.**

A FEW POINTS OF INFORMATION:

- Written requests for grants are accepted and reviewed throughout the year.
- Receipt of your organization's grant proposal will be acknowledged in a timely manner.
- Analysis of grant requests may require several months.
- We may request a site visit or a meeting after the review of the complete proposal.
- Reporting and Evaluation Requirements will be discussed with the grantee if a grant award is made. If a grant is awarded, the grant contract will specify the exact evaluation and reporting requirements.
- Within a capital grant, the Foundation may not contribute more than 30% of the total cost of the capital project. Typically, the Foundation awards grants for less than 30% of the total cost of the capital project.
- If you are an Israeli organization, you must have all documents in English and all financial statements in US dollars.
- If you have any questions about your organization's proposal, please call The Harry and Jeanette Weinberg Foundation at 410-654-8500, and ask to speak to the Program Director assigned to your grant application, or check www.hjweinbergfoundation.org for their contact information.

Please mail one copy of the proposal with the required attachments to:

The Harry and Jeanette Weinberg Foundation
Attention: Name of your Program Director
7 Park Center Court
Owings Mills, MD 21117

SECTION I: Introduction

A. Title Page

- Title of your organization's project
- Name of your organization
- Submission date of the proposal
- Amount of the grant request and total project cost
- Complete contact information

SECTION II: Grant Request

PLEASE KEEP THIS SECTION (A-G) TO TEN PAGES OR LESS.

A. Summary

- Briefly describe the organization and project goals, objectives, methods, and the benefits (direct services) to the disadvantaged people in your community.
- Include the amount of the grant request and the period of time over which the grant payments would be made.

B. Capital Project Description

- State the **project's objectives** in measurable, achievable terms.
- State the **issue or need to be addressed**, describe the size and/or severity of the issue or need, and explain the evidence demonstrating the importance of this issue or need.
- Describe the **program** and services to be provided in the completed capital project.
- Please provide information on the **target population** served by this request and the number of individuals expected to be served, annually, upon completion of this project.
- Discuss the **anticipated results (outputs and/or outcomes) for the request**. Explain how the capital project directly and/or indirectly addresses the issue or need and supports the achievement of these results.
- State whether this capital project is for the **purchase, construction or renovation** of a building or for the **purchase of major equipment**.
- Include a description of **project financing**, if applicable.

C. Project Relevance

- Tell us **how your organization's project will help to alleviate poverty** in your population.
- Confirm with **valid data** that your organization provides direct services that mostly benefit people whose income is below the median income in the community or metropolitan area in question.
- Describe how this capital project will enhance the organization's ability to provide direct services.

D. Potential Challenges and Contingency Plans

- Describe any **potential challenges** you may encounter in completing this capital project and alternative approaches or solutions to these challenges.

E. Organization's Resume

- Provide the organization's **official mission statement**.
- Tell us about your organization's qualifications. Demonstrate that your organization has the institutional capacity and capability to achieve its objectives by mentioning the expertise of your organization's staff and volunteers, previous work in your field, the size and age of your organization, your organization's facilities and resources, and anything else that demonstrates excellence in your organization's discipline. Mention your organization's credibility recognized by others: state licenses, accreditation, awards.

Let us know if your organization has received previous support by the Weinberg Foundation. Please include a brief history of your organization.

- List **formal partnerships** with other nonprofit organizations that provide similar or collaborative services in your community.
- What other organizations are doing work similar to your organization's work in your geographic area?

F. Monitoring and Evaluation

- Please describe how your organization assesses its **overall success and effectiveness**. What evaluation tools do you use? How are the evaluation results being used? If applicable, include results from recent evaluation reports.
- Briefly describe how you will monitor the success of the capital project. Provide specific benchmarks that you plan to reach and provide a defined timeline. *For example: Complete value engineering by 3/09; Begin demolition by 5/09; Begin construction by 8/09.*

G. Financial Information

- What is your plan for a building maintenance reserve?
- Is there a **charge for services** your agency provides to clients? If yes, explain.
- Please state your organization's fiscal year.

SECTION III: Additional Information

A. Signatures

- Your **agency's Executive Director** (not the Development Director) **and the President of your agency's Board of Directors** must sign on the last page of this application.

B. Attachments

- **Resumes and job responsibilities** of the top three program responsible staff at your organization
- A copy of your organization's previous fiscal year's **organizational budget**, a copy of your current fiscal year budget, and a copy of your next fiscal year budget
- **Project budget:** Provide a detailed, line-item budget for this project. What institutional commitment can you make to this project (internal funds from your organization or in-kind donations, i.e., tangible assets such as computers, salaries, etc.)? Itemize major purchases by category. If you have personnel charged to the project, please explain their roles.
- **List all pledged and pending funding for this capital campaign in tabular form with the following columns:**
 - Identify** if the funder is individual, corporate, foundation, or government
 - Date of pledge**

- Payout period** of pledge
- Amount** of pledge
- Amount of actual payments** received to date
- Balance owed**

Please provide totals for columns (d) - (f). All single pledges below \$5,000 should be cumulated in a single row, stating in column (a) the number of such small pledges and leaving columns (b) & (c) blank. Please follow table format below.

- **Demonstrate site control:** Does your organization own land and building? If not, explain lease arrangements.

Include:

- **Copy, if available, of value engineered plans** and examples of resulting changes or signed contract with builder
- Your organization's **audited financial statements** for the past two completed fiscal years. If non-audited, then please explain.
- The **complete, unedited Form 990 filings** for the past two completed fiscal years for which you have filed. If a filing was due but was not filed, then please explain.
- The most recently published **Annual Report**
- **List of Board Members** - their names, affiliations, and roles they play in your organization

Here is an example of how the table should be formatted:

a	b	c	d	e	f
Name of Funder <i>(Corporate, Foundation, Government)</i>	Date of Pledge	Payout Period	Pledge Amount	Payments Rec'd to Date	Balance Owed

example



Capital Data Sheet (US)

INSTRUCTIONS:

Please fill in the requested information below.

- Organization legal name: _____
- Charitable status and incorporating jurisdiction: _____
- Street address: _____
- City, state, zip code: _____
- The organization's purpose (organizational background/mission statement): _____

- Purpose of this grant (project title): _____

THE CAPITAL PROJECT

- Address of capital project: _____
- Brief description of project (what is actually being done): _____

- General use to which capital project will be put (what is the project going to do): _____

- Amount of existing space at capital project (if land specify acreage, if building specify square footage): _____

- Amount of existing space to be renovated (if applicable): _____
- Amount of new space to be created-constructed (if applicable): _____
- Total amount of space (created and/or renovated) upon completion: _____

Capital Data Sheet (US)

OWNERSHIP

■ Owner of the land: _____

■ Owner of the existing building (if applicable): _____

■ Owner of the building after capital project is completed: _____

If one or more other entities owns and/or leases the land and/or building, and your organization is a partner, member, or otherwise formally involved in one or more of those other entities (e.g., when tax credit financing is involved in the capital project; or your organization is one of two or more organizations forming a partnership, limited partnership, corporation, or LLC to own and/or lease the land and/or building), then please explain in detail. If the land and/or building is owned and/or leased by another entity, please explain in detail. In the case of a lease, please describe the major economic terms of the lease (term, options, annual rental amount, etc.). The Foundation requires that the explanation come from the attorney handling these matters and that backup documentation be provided.

If the previous paragraph does not apply to your situation, such as if you only are the operator of programs within the building, then what back agreements or other commitments (leases, right to use, or other agreements) are there with the owner and/or tenant of the land and building? Please explain in detail. The Foundation requires that the explanation come from the attorney handling these matters and that backup documentation be provided.

****Please consult your real estate attorney to explain in detail all issues of land use, ownership of building and land, rights for long-term use, and any sub-leases or back agreements. Failure to provide sufficient details and documentary backup likely will cause major delays in making a decision on your grant request.****

■ Total cost of capital project: \$ _____

■ Other relevant information: _____

■ Targeted geographic area to benefit from capital project: _____

FUNDING OF CAPITAL PROJECT

Old commitments: Current funding commitments and payments received solely for the capital project ("old commitments"), not for endowments or operations: \$ _____

Please fill in the table below as applicable.

Funder Identity	Commitment Date	Commitment Amount	Agreed Payment Period	Payments Made	Balance Due
Cumulative listing of individual commitments less than \$1,000					
TOTALS					

Capital Data Sheet (US)

- *Funding gap*: Before the Foundation's funding commitment, the funding gap to complete the capital project is as follows:

■ Commitment gap (total cost of project minus old commitments): \$ _____

■ Payment receipt gap (total cost of project minus total payments made): \$ _____

■ *Encumbrances/Liens*: Details about encumbrances or liens on the capital project (includes mortgages, bonds, etc.):

■ Other relevant information: _____

NAMING RECOGNITION OF FOUNDATION'S FOUNDERS (only if applicable)

- *Naming recognition*: In consideration of the Foundation's capital grant, the grantee shall provide the following recognition to the Foundation's founders, Harry and Jeanette Weinberg:

■ The portion of the capital project that is being named in honor of Harry and Jeanette Weinberg, in perpetuity (i.e. the building/ the wing/ the floor/ the room): _____

■ The name being used, subject to change by mutual agreement of the parties ("name building/wing/floor/room"):

■ Where on the capital project that naming recognition will be placed (i.e. outside of building, main entrance to floor, outside of the room, etc.): _____

■ Anything special or unusual that must be in the agreement? Please explain:



Capital Data Sheet (Israel)

INSTRUCTIONS:

Please fill in the requested information below.

- Organization legal name: _____
- Charitable status and incorporating jurisdiction: _____
- Street address: _____
- City, state, zip code: _____
- The organization's purpose (organizational background/mission statement): _____

- Purpose of this grant (project title): _____

THE CAPITAL PROJECT

- Address of capital project: _____
- Brief description of project (what is actually being done): _____

- General use to which capital project will be put (what is the project going to do): _____

- Amount of existing space at capital project (if land specify acreage, if building specify square footage): _____

- Amount of existing space to be renovated (if applicable): _____
- Amount of new space to be created-constructed (if applicable): _____
- Total amount of space (created and/or renovated) upon completion: _____

Capital Data Sheet (Israel)

OWNERSHIP

- Owner of the land: _____
- Owner of the existing building (if applicable): _____
- Owner of the building after capital project is completed: _____
- Chachira: What year does the long-term land lease expire? _____
- Haktza'at Shetach: Is there one, between which parties, and for how long? _____

If you are only the operator of programs within the building and not the owner, then what back agreements (leases, right to use, or other agreements) are there with the owner of land and building?

Please consult your real estate attorney in Israel to explain in detail all issues of land use, ownership of building and land, rights for long-term use, and any sub-leases or back agreements. Failure to provide sufficient details and documentary backup likely will cause major delays in making a decision on your grant request.

Please determine if you are an amutah or a public company and who the majority partner is.

- Total cost of capital project: \$ _____
- Other relevant information: _____

- Targeted geographic area to benefit from capital project: _____

FUNDING OF CAPITAL PROJECT

Old commitments: Current funding commitments and payments received solely for the capital project ("old commitments"), not for endowments or operations: \$ _____

Please fill in the table below as applicable.

Funder Identity	Commitment Date	Commitment Amount	Agreed Payment Period	Payments Made	Balance Due
Cumulative listing of individual commitments less than \$1,000					
TOTALS					

Capital Data Sheet (Israel)

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- Other relevant information: _____

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- The name being used, subject to change by mutual agreement of the parties ("name building/wing/floor/room"):

- Where on the capital project that naming recognition will be placed (i.e. outside of building, main entrance to floor, outside of the room, etc.): _____

- Anything special or unusual that must be in the agreement? Please explain:

SECTION IV: Your Organization's Commitment to Professional Development & Training

The Foundation is interested in learning about your organization's commitment to professional development and training opportunities for your employees. *Please note, the following questions reflect the Foundation's desire to learn more about its prospective grantees. Your organization's responses will not impact funding decisions.*

- 1. For the current fiscal year, how much has your organization budgeted for professional development and training? How will the funds specifically be used?**
For example, will it be used for conference attendance, professional coaching, classwork towards relevant advanced degrees, etc.?
- 2. Does your organization (please answer yes/no to each question):**
 - (a) Offer financial support for professional coaching for any employees? If so how many?
 - (b) Offer financial support or tuition reimbursement for college or advanced level degree coursework for any employees? If so how many?
 - (c) Pay for employee participation in dedicated leadership development or professional development programs or conference attendance? If so, how many?
- 3. Please describe the staff training and leadership development opportunities that currently exist within your organization and also please identify your most significant need or challenge in this area.**

SECTION V: Your Organization's Commitment to Safe and Respectful Workplaces

Consistent with its own values, the Foundation expects that grantees will develop and maintain a work environment in which employees are treated with civility and respect, including through policies prohibiting illegal discrimination, all forms of unlawful harassment, sexual harassment, and retaliation toward employees, clients, donors, or other persons. *Accordingly, we ask that you respond fully to the following questions:*

- 1. What steps have you taken in the last year to ensure a safe and respectful workplace for your employees?**
- 2. What steps have you taken in the last year to ensure a safe and respectful service environment for your clients?**

If you have specific policies in place, please attach them to your application.