

## Proposal Review Process

- Your proposal will be reviewed and evaluated by the Foundation to ensure that the request falls within the mission and guidelines of the TakeCare Foundation.
- Your proposal will then be forwarded to the appropriate Employee Allocation Committee in your area for further review. At that time, a committee member may call you with additional questions or request a site visit or a meeting with your organization’s staff or clients.
- The Employee Allocation Committees will finalize their recommendations for funding which will be forwarded to the Board of Directors.
- After the Board of Directors meeting, you will receive a letter informing you of the Foundation’s decision regarding the funding of your proposal.
- **Pending proposals:** Due to our overlapping cycles you may submit a proposal each cycle. If you receive funding in any given year, you are not eligible for funding until the following year. Organizations will be awarded funding only once per year.

## Proposal Cycle

Proposal Deadlines	Jan. 1	July 1
Foundation Review	Jan. – Mar.	July – Sept.
Allocation Committee Review	Apr. – May	Oct. – Nov.
Board Review	June	Dec.
Agency Notification	Late June	Late Dec.



## Guideline for Charitable Giving

**Touch A Life. Give Back to the Community.**



# Guidelines

## Eligibility

- Nonprofit agencies with tax-exempt status under section 501(c)(3) of the Internal Revenue Code or an appropriate government agency (i.e. school).
- Nonprofit organizations that have been in existence for at least two (2) years.
- Serving residents in TakeCare market areas.
- Operated and organized so that they do not discriminate in the hiring of staff or the provision of services on the basis of race, religion, gender sexual orientation, age, national origin or disability.
- The TakeCare Foundation provides grants in the \$2,000 - \$5,000 range, and prefers funding specific projects. Requests for operating costs will be considered if the request is very specific and clearly defined.
- Agencies may submit only one proposal per cycle.
- Organizations will be awarded funding only once per year.

## Limitations

- Annual campaigns/fundraising
- Arts/Cultural programs
- Associations – Professional/ Technical
- Capital Campaigns
- Challenge Grants/ Matching Grants
- Endowments
- Hosting/ Supporting conferences/ Seminars
- Individual Support
- Multiple year requests
- Private Foundations
- Programs which promote religious doctrine
- Research
- Scholarships
- Sponsorship of special events

## Submitting your proposal

•The TakeCare Foundation requires **TWO COPIES** of the following documents:

- Application form
- Checklist form
- Cover letter accompanying the proposal, signed by either the CEO or appointee of the organization, summarizing the proposed project, the problem addressed, as well as the amount requested. The name and phone number of the contact person should be included in the cover letter.
- Entire proposal (two to five pages in length). See proposal requirements.
- IRS letter confirming your organization's tax-exempt status.
- Most recent audited financial statement. If an audited statement is not available, please submit a written statement indicating that an appropriate accounting system has been established, signed by the Chairman or CPA.
- Current operating budgets and line item budget for specific project.
- Most recent IRS Form 990, signed and dated, including all schedules.
- List of major funders and amounts.
- List of Board of Directors.
- Other support documents: i.e. annual, report, brochures, etc. Do not submit videotapes.
- One paragraph summary of previous support from the TakeCare Foundation.

## Proposal Requirements

- Two to five pages in length (do NOT exceed five pages).
- Background information and qualifications of applicant organization (purpose, current programs, and activities, etc. )
- Description of the problem, need or issue which the proposal seeks to address.
- Complete description of the proposed project including goals, objectives, timeline, staffing and evaluation of the project.
- Description of geographic area served by the organization.
- Line item budget showing project costs as well as the description of how the organization will secure future funding.

