

THE HUBBELL-WATERMAN FOUNDATION

Grant Application Form

SUBMITTING YOUR PROPOSAL

Please do not use folders, notebooks or binders. Do not include videotapes or additional materials that are not specifically requested. Faxed proposals are not acceptable.

Complete proposals, including all attachments, may be submitted via email to www.Hubbell-Waterman Foundation.org. Proposals submitted via email must be in Microsoft Word and/or Excel, version 2000 or earlier. Scanned documents accompanying the proposal must be in .tif, .jpg, .bmp, or .pdf formats. If you are submitting a hard copy, please provide one complete original and one complete copy of the proposal, including all attachments. Proposals must be either electronic or hard copy – no combination of the two formats is acceptable.

Please submit all hard copy proposals to:

The Hubbell-Waterman Foundation
c/o C. D. Waterman III
Lane & Waterman LLP
220 N. Main St., Suite 600
Davenport, IA 52801
563-333-6608

Note, if you currently have an open grant with The Hubbell-Waterman Foundation and plan to apply for a new grant for the same project, please be sure that you submit the required interim or final report for your current grant before applying again. If you have questions, contact C. D. Waterman III at 563-333-6608.

A cover letter accompanying your application is optional.

Organization Information

Applicant Organization (Legal Name):

Doing Business As:

Previous Name, if changed:

Street Address:

City/State/ZIP:

Phone:

Fax:

E-mail:

Web Site:

Executive Director:

Direct Phone:

Name as listed on IRS tax exempt determination letter:

IRS Letter Date:

Tax Exempt ID Number (EIN):

Organization Founded:

It's Mission Statement:

Number of Paid Staff (Full and part-time):

Number of Persons Served Annually:

Organization's Budget:

Revenue:

Expenses:

Organization's Endowment Size:

Organization's Five Major Funding Sources:

Organization's Geographical Focus:

Have you received funding from The Hubbell-Waterman Foundation in the past 3 years?

Yes No If you answered YES please indicate total funding received: \$ _____

Are you applying for an operational grant following construction of the capital improvement?

Yes No

Applicant is applying for the following type of grant that The Hubbell-Waterman Foundation has identified on its Statement of Priorities for the next annual funding cycle:

[insert current Statement of Priorities]

Program/Project Information related to this Grant Application/Request:

Type of grant requested: Capital construction Operational Grant

Program/Project Title:

Total Cost of this Project:

Amount of Funding Requested:

Dates covered by this Grant:

Grant Request contact person:

Title:

Email:

Direct Phone:

Describe Current Services You Provide:

Please Summarize Proposed Purpose and Objectives of the Grant:

Is this a new or ongoing activity?

Brief description of the Program/Project:

Timetable for implementation:

Are other organizations participating? If so, who are they?

Brief demographic description of who will benefit from the Program/Project, including the number of adults/children who will be impacted and/or affected and how:

Community/Counties/Geographical Area served by Program/Project:

Evaluation:

Expected results during funding period:

How do you define and measure success:

Do any trustees of The Hubbell-Waterman Foundation serve on your board of directors?

Yes No

If Yes, please list : _____

For this Application, please list below any other entities from whom you are requesting or may request funding, the amounts requested, and the amounts granted or otherwise committed:

Total amount being requested of Hubbell-Waterman Foundation \$ _____

Others:

_____	\$	_____
_____	\$	_____
_____	\$	_____
_____	\$	_____

Total Funding Requests: \$ _____

Please note with an * those requests that are still pending.

If you have received State or Federal Grants/Funding for this project, please list:

_____	\$	_____
_____	\$	_____
_____	\$	_____
_____	\$	_____
_____	\$	_____
_____	\$	_____
Total:		\$ _____

Attachments – attach the following:

1. Board of Directors, occupations and/or community affiliations.
2. Antidiscrimination statement adopted by your Board.
3. List of names and qualifications of key staff.
4. Most recent fiscal year-end financial statement (audited if available).
5. Annual Report.
6. Program/project budget.
7. IRS tax exempt determination letter.

Please add any other comments you would like to make for the benefit of the trustees: _____

The undersigned hereby certifies that the information contained in this Grant Application/Request is correct to the best of our knowledge. We understand that our submission of this request does not guarantee funding will be provided in part or in whole.

Signature of Executive Director

Date

Signature of Board President

Date

Interim Report Format for Multi-Year Grants Only

Please submit a report on each anniversary date of the grant to the Foundation listing your project's goals and objectives as outlined in your original proposal. Describe:

- Any changes to your Organization's IRS 501(c)(3) status
- Progress made on each goal and objective to date
- If any goals or objectives have been changed, added or deleted and the rationale for these changes
- Difficulties Encountered / Lessons Learned in pursuing your goals and objectives to date
- Changes in the grant budget

Once again, we are pleased to have provided support for your project and look forward to learning with you. Best wishes for success with it and in all of your work.

Final Report

Following is a Final Report Form regarding the grant your organization received from The Hubbell-Waterman Foundation.

The Final Report is in two parts:

- Five questions to be answered in narrative or outline form (2-3 pages total)
- Final Budget and Expenditure Report (this form may be typed or re-created by your own word processing or spreadsheet system)

Please complete the Final Report and email it to our web site, or if on paper return it to the Foundation, Attention: C. D Waterman III, within 30 days of the end of the grant period. Remember that all unexpended grant funds must be returned to the Foundation with this report. Requests for extensions to complete project activities using unexpended grant funds must be submitted in writing and discussed with Foundation before the end of the grant period. Also, organizations with late reports will not be considered for future funding until all overdue reports are received.

We are pleased to have provided support for your project and look forward to learning with you. Best wishes for success with it and in all of your work.

Final Report Form

1. List your program/project's goals and objectives as outlined in your original proposal. Describe:
 - Progress made on each goal and objective – if goals were not met, please explain
 - If any goals or objectives were changed, added or deleted and the rationale for these changes
 - Any difficulties encountered in pursuing your goals and objectives
2. Describe the target population your original proposal stated you would reach. Describe the actual population served – if different than anticipated, please explain.
3. What are the main lessons learned from this program/project? (For example, what did you learn about your organization? The population served? The problem or issue you addressed?) If you plan to continue this program/project in the future, based on what you learned, how would you improve or change it?
4. Complete the attached certified budget and expenditure report. If there were significant changes in the program/project budget (10% greater or less than original line items, new line items or deleted line items), please explain these changes.
5. Aside from additional funding, how can the Foundation be helpful to you? What would you like the Foundation to know about the program/project that might guide us in developing our future grant-making priorities?

Note to Grantees: For helpful information on the art of evaluation, visit www.innonet.org. The site contains a useful glossary if you need clarification of terms used below.

