

NATHAN B. AND FLORENCE R. BURT FOUNDATION, INC.

4155 East Jewell Avenue, Suite 814
Denver, Colorado 80222
WWW.BURTFUNDATION.ORG

The Nathan B. and Florence R. Burt Foundation, Inc. (hereinafter “The Foundation”) is a non-profit corporation incorporated on December 13, 1984, operating as a private foundation as defined in Section 509(a) of the Internal Revenue Code (IRC), and is qualified as a tax-exempt organization pursuant to IRC Section 501(c)(3). The Foundation is endowed and does not seek contributions from others, but dispenses grants, outright or on a matching/challenge basis, primarily to tax-exempt charitable and educational organizations primarily dealing with youth and senior citizens located and carrying out their programs in Colorado.

The Foundation generally restricts its grants to organizations dealing with and affecting the needs of children and senior citizens in Colorado. The Foundation rarely makes grants over \$2,500.

The Board of Directors (Trustees) and officers of the Foundation are:

Harry L. Arkin, Esq..... President/Chairman of the Board/Director
Mr. John C. Baker Vice President/Director
Mrs. Natalie Meyer Secretary/Director
Mr. Gregory Dickson ... Treasurer/Director
Dr. Harrison Hayes Director
Dr. Bruce M. Jafek Director
Dr. Margaret Fomer Director
Ms. Rosmina Garcia Director

APPLICATION FOR GRANT FORMS of the Foundation should be downloaded from the Web at the above internet/website address. Prospective applicants for Grants should read them and fill out the forms carefully. That form, in the required number of copies, etc., accompanied by documents described in the enclosed Grant Application Instructions and Program/Project Budget forms must be mailed or delivered to the Foundation at the above address **to arrive** on or before the deadline as stated on the website. Only applications in the forms as shown on the website will be considered; **NO GRANT APPLICATION WILL BE CONSIDERED UNLESS SUBMITTED AS INSTRUCTED.**

CRITERIA FOR GRANTS:

The Foundation restricts its grants whereby the Applicant:

1. Must be a charitable or educational organization qualified under Sections 501(c)(3) or 501(c)(4) of the Internal Revenue Code; if the program for which an application is being submitted is a “**doing business as**” or **d/b/a**, the program must have a current Statement of Trade Name filed with the Office of the Colorado Secretary of State and include the same with its Grant Application in addition to a Certificate of Good Standing from the Colorado Secretary of State;
2. Must be located in and carry out its objectives in Colorado; and
3. Have not applied for a Grant from the Foundation for at least one (1) year.
4. The Foundation does **not** make grants for general operating or capital construction costs, to individuals, or to or for political causes, organizations or candidates.

NO APPLICATION WILL BE CONSIDERED UNLESS SUBMITTED EXACTLY AS INSTRUCTED WITH NO DEVIATIONS (SEE GRANT APPLICATION INSTRUCTIONS).

The narrative cover letter is not to exceed three (3) pages. Enclosure of additional limited pamphlets or informational materials, if any, relating to applicant organizations and/or the proposed use for which a Grant is being applied may be helpful, but are discretionary; please do not overwhelm us — we do not make grants based upon the weight of the application. Expensive, multicolored, annual reports, etc. detract from evidence of need unless as stated as donated to the Applicant and not stated as such.

Do not refer to "attached documents" in responding to the Grant Application item entitled "Brief Description of Request". You must summarize the Program/Project (blue form/paper) as to the purpose for which a grant is sought; strict limit of 350 characters with specific instructions as shown on the form, and fill out the Categories of Services form attached thereto.

Grants will not be made to an organization for more than one proposal within a twelve-month period. Also, if a proposal has been considered and denied funding, applicants must wait twelve (12) months from the date of the last application before submitting a new proposal for consideration. Since the Foundation receives funding requests far in excess of its income, only a portion of the Applications can be approved. A decision not to fund an Applicant does not reflect on the merits of the Applicant nor the value of its proposal, but rather results from the limited resources of the Foundation.

No Application for a Grant from an organization previously funded by the Foundation will be considered until and unless a Grant Evaluation of the expenditure of the previous grant has been submitted to the Foundation within the time limit specified. The Grant Evaluation form provided on the Foundation Website must be completed and returned to the Burt Foundation within ninety (90) days after a Grant is paid or the Grantee will be barred from future consideration by this Foundation for a period of several years.

Applicants will be notified within thirty (30) days after they have been considered. Please do not call to enquire until that period has expired or you have received a letter as to action on your Application.

The Foundation's latest Annual Report may be inspected at the above address by appointment or a copy may be obtained from the office of the Colorado Attorney General.

Thank you for giving us the opportunity to consider assisting you with your work and service to your community.

The Nathan B. and Florence R. Burt Foundation, Inc.

NATHAN B. AND FLORENCE R. BURT FOUNDATION, INC.

GRANT APPLICATION INSTRUCTIONS

- A. **Application for Grant Form**: (**must be printed on blue paper**) to tell the Burt Foundation who and, **briefly**, what Applicant is submitting for the Burt Foundation's consideration (using the fillable fields form from the website), and attached Categories of Services (on white paper).
- B. **Program/Project Budget**: (**must be printed on green paper**) for the **specific use** to which funds applied for will be used (using the fillable fields form from the website).
- C. **Narrative**: (**must not exceed three [3] pages**). The narrative must include the following information **in this order**:
1. **Application Information**
 - a. Mission statement, (brief statement of Applicant's organization's goals, and/or objectives);
 - b. Brief summary of Applicant's history; and
 - c. Description of current programs, activities and accomplishments of Applicant.
 2. **Purpose of Grant** – This section should include the following:
 - a. Brief statement of the issue to be addressed; description of constituency served by Applicant or program for which funds are applied (include target population) and how they will benefit;
 - b. Description of goals and objectives for the purpose of the grant (in greater detail than on "Application");
 - c. Description of activities planned to accomplish these goals and whether this is a new or ongoing activity on the part of sponsoring organization;
 - d. Timetable for implementation, and how goals, success of grant will be measured;
 - e. Other organizations, if any, participating in the same area of activity, program or project; and
 - f. Long term sources/strategies for funding program or project after grant utilized.
- D. **Assembly of Grant Application**: Each set of documents includes ONE copy of each of the following documents:
- 1) Checklist
 - 2) Grant Application (PRINT ON BLUE); CATEGORIES OF SERVICES (PRINT ON WHITE)
 - 3) Program/Project Budget (PRINT ON GREEN)
 - 4) Narrative
 - 5) Financial statement
 - 6) Annual report (or letter)
 - 7) IRS determination letter with signature of authorized IRS personnel
 - 8) Certificate of Good Standing (NOT Certificate of Registration); if the Applicant is a d/b/a of a parent corporation, please also include a copy of the Statement of Trade Name filed with the Office of the Colorado Secretary of State
 - 9) List of Board of Directors and Officers

- 10) List of three (3) Key Staff Members and their Qualifications
- 11) List of major contributors
- 12) Description of in-kind contributions
- 13) Description of volunteer involvement
- 14) Other supporting material (if applicable) [GRANTS are not made on the basis of the amount of material submitted.]

EACH SET OF DOCUMENTS IS TO BE COLLATED/ASSEMBLED IN THE ORDER DESCRIBED ABOVE AND THREE-HOLE PUNCHED

Follow the checklist exactly. Applications not submitted exactly as instructed and/or contain errors, will not be corrected by Foundation staff. The improperly submitted Application will NOT be considered for Grant funding and will be DISCARDED.

NATHAN B. AND FLORENCE R. BURT FOUNDATION, INC.

GRANT APPLICATION CHECKLIST
[RETURN WITH APPLICATION]

THE TOTAL NUMBER OF COPIES OF EACH DOCUMENT TO BE SUBMITTED IS LISTED BELOW; SETS OF DOCUMENTS MUST BE

- **COLLATED (ASSEMBLED)** IN THE ORDER SHOWN AND
- **PUNCHED** FOR A THREE-HOLE BINDER

Name of Applicant: _____

D/B/A (if applicable): _____

Contact Person: _____

Telephone Number: _____

	DOCUMENT	# of Copies	√
	If you do not forward a copy of each document required, you must include an explanatory letter regarding those omitted or the Application will <u>NOT</u> be considered		
1.	Application for Grant (MUST PRINT ON BLUE PAPER); attached Categories of Services (print on white)	4	
2.	Program/Project Budget (MUST PRINT ON GREEN PAPER)	4	
3.	Narrative on white paper (NOT TO EXCEED THREE (3) NUMBERED PAGES)	4	
4.	Financial Statements (most recent fiscal year-end)	4	
5.	Annual Report (most recent) of your Organization [If no Annual Report is prepared, state so in a letter in place thereof]	4	
6.	IRS determination letter indicating 501(c)(3) or 509(a) status including signature of authorized IRS personnel	4	
7.	Certificate of Good Standing* from Colorado Secretary of State (or from the state which your organization is located if you do not have Colorado operations) [*Issued within one (1) year of the date of Application you are submitting]; if the Applicant is a d/b/a of a parent corporation, please also include a copy of the Statement of Trade Name filed with the Office of the Colorado Secretary of State	4	
8.	List of Board of Directors and Officers	4	
9.	List of three (3) Key Staff Members and their Qualifications	4	
10.	List of major contributors	4	
11.	Description of in-kind contributions	4	
12.	Description of volunteer involvement	4	
13.	Other supporting material, <u>may</u> be included, Grants are <u>NOT</u> made on basis of amount of material submitted	4	
14.	Include this Checklist with your application with each item checkmarked as included	4	

TO: NATHAN B. AND FLORENCE R. BURT FOUNDATION, INC.
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APPLICATION FOR GRANT: ORGANIZATION SUMMARY

MUST PRINT ON BLUE PAPER

ORGANIZATION NAME: _____

DOING BUSINESS AS (D/B/A, if applicable): _____

CONTACT PERSON: _____

(Organization Contact Name and Title – Typed or Printed)

ADDRESS: _____

Office Phone: _____ Office Fax: _____

Email Address: _____

BRIEF DESCRIPTION OF PURPOSE OF SPECIFIC PROJECT FOR WHICH FUNDING IS APPLIED: Enter Text Below (strict limit -350 characters; do **not** repeat organization name or generalities; please do **not** use acronyms or names of organizations with which our Directors may not be familiar)

ATTACH CATEGORIES OF SERVICES

FISCAL YEAR END: _____ AMOUNT REQUESTED: \$ _____

(Bear in mind that our average grant is \$2,500.00 and customarily are less)

PRIOR APPLICATION(S) TO/GRANTS FROM THIS FOUNDATION:

Year(s) _____

General and Administrative (G&A) Expenses Attributable to this Program/Project	Total G&A Expenses of Applicant	Total Percentage of expenses of Applicant used for fundraising
_____ %	_____ %	_____ %

Signature – President or Executive Director

Date

Typed/Printed Name – President or Executive Director

CATEGORIES OF SERVICES:

Please check the appropriate category in which your organization is involved and applying for a Grant:

Serving Children:	
Under 12 years old	
Includes children over 12	
Senior Services	
Family Services	
Education Related	
Food Services	
Violence Prevention	
Health:	
Mental	
Physical	

Other: _____

NOTE: We do not make grants for capital construction costs, to individuals, or to or for political causes, organizations or candidates.

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PROGRAM/PROJECT BUDGET

MUST PRINT ON GREEN PAPER

ORGANIZATION NAME: _____

PROGRAM / DBA NAME: _____

ITEMIZED COSTS OF PROGRAM:

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

TOTAL COST (A) \$ _____

OTHER FUNDS AVAILABLE FOR THIS PROGRAM/PROJECT:

Gifts and Grants/pledged or paid

Trusts \$ _____

Corporations \$ _____

Foundations \$ _____

Individuals \$ _____

Government \$ _____

In-Kind Contributions (value) \$ _____

Other (Earned Income, special events, membership, subscriptions, etc.) \$ _____

United Way or other community based charity \$ _____

Total Funding Available (B) \$ _____

Balance Required (A minus B) — \$ ()

GRANT REQUESTED..... \$ _____