

PROJECT SUBMISSION CHECKLIST

The BIA Cares Project Submission consists of the following components, which should be submitted with the request for grant funding or construction project request. This checklist is provided to help ensure a complete proposal. It does not need to be submitted with the proposal.

- Check specific Criteria guidelines to ensure that the project meets application requirements.
- Section I: Cover Letter**
Include the purpose of the grant request and a brief description of how the request fits with the BIA Cares mission and criteria.
- Section II: Summary Sheet Form**
Use the 2-page template provided.
- Section III: Narrative**
- Financial Contribution:* Specify how funds will be used, other sources of funding for the project, and bids if applicable.
- Construction Project:* Specify full details of construction project with renderings or plans, bids on the project, and other sources of funding for the project.

Narrative Questions

- 1. Organization Background
- 2. Goals
- 3. Current Programs
- 4. Project Overview
- 5. Optional
- Section IV: Attachments**

Financial Attachments

- 1(a). Organization budget
- 1(b). Program or project budget, if applicable
- 2. Current (year-to-date) financial statements
- 3. Year-end financial statements/audit
- 4. Major contributors / In-kind contributions, if applicable
- 5. Proof of IRS federal tax-exempt status



The Charitable Foundation of the Building Industry Association of San Diego County

SUMMARY SHEET FORM

Name of Organization:

Mailing Address (and Physical Address if it is different and not confidential):

Phone:

Fax:

EIN:

Website:

Organization Email Address:

Name of CEO or Executive Director:

Phone:

Email:

Application Contact & Title (if *not* the CEO or Executive Director):

Phone:

Email:

Organization Information

Year Founded:

Mission Statement:

Geographic Area Served (specific to this proposal):



The Charitable Foundation of the Building Industry Association of San Diego County

Tax Exemption Status:

501(c)(3)

Grant Request Information

Type of Grant Requested (select one):

Amount of Request:

\$

Financial Grant Support

Construction Project

Name of Program or Project:

Describe what the grant will be used for:

[Large empty text box for describing grant usage]

Financial Information

Organization's Current Budget for Fiscal Year Ending:

Income:

Expenses:

AND, if other than a general operating request,

Program or Project Budget:

Dates: from:

to:

Income:

Expenses:

By signing below, I certify that the information contained in this application is true and correct to the best of my knowledge.

CEO/Executive Director

Date

NARRATIVE

1. **ORGANIZATION BACKGROUND.** Discuss the founding and development of the organization. Explain the original issue and/or opportunity the organization was founded to address and how that may have changed over time.
2. **GOALS.** Describe the organization's current goals.
3. **CURRENT PROGRAMS.** Provide a brief description of the organization's current programs. Include population and numbers served, as well as expected results. *If this request is for a specific program, describe the organization's **other** programs here. Describe the program for which you are seeking funding in Question 4.*
4. **PROGRAM OR PROJECT REQUESTS ONLY.**
 - a) Provide a summary of the plan for the program or project request. Include the issue and/or opportunity addressed, goals and objectives, activities, and timeline.
 - b) Explain why the organization is approaching the issue and/or opportunity in this way.
5. **OPTIONAL.** If there is additional information that is vital to convey in this proposal, do so here.

ATTACHMENTS

Financial Attachments

1. **BUDGETS.** Include revenues and expenses.
 - a) The organization's operating budget for the current fiscal year. If available, also include the budget for the upcoming fiscal year.

If the request is for a program or project, also include:
 - b) Program or project budget for the program period.
2. **CURRENT (YEAR-TO-DATE) FINANCIAL STATEMENTS.** Include a Statement of Financial Position (Balance Sheet) and Statement of Activities (Income and Expense Statement) through the most recently completed operating month available.
3. **YEAR-END FINANCIAL STATEMENTS, AUDIT, AND SOURCES OF INCOME.** Include the most recent fiscal year-end financial statements, audited if available.
4. **MAJOR CONTRIBUTORS/IN-KIND CONTRIBUTIONS.** List major contributors (foundations, businesses, government, individuals) and in-kind donations (donated goods and professional services) received by the organization for the last fiscal year.

Other Attachments

5. **PROOF OF IRS FEDERAL TAX-EXEMPT STATUS,** also called a Letter of Determination.