

GRACE AND FRANKLIN BERNSEN FOUNDATION

Foundation Policies and Guidelines for Applications

MISSION

The Grace and Franklin Bernsen Foundation was established in 1968 to provide Tulsa and the surrounding area with a continuing source of significant monetary support for a broad range of deserving charitable causes and undertakings. The primary focus of The Grace and Franklin Bernsen Foundation is to provide grants primarily within the metropolitan Tulsa area in support of religious, charitable, scientific, literary or educational purposes.

Eligibility

- To be eligible for consideration by The Grace and Franklin Bernsen Foundation an organization must provide a copy of the determination letter from the Internal Revenue Service indicating that it is a tax exempt organization as described in Section 501 of the Internal Revenue Code of 1986 and is treated as other than a private foundation as within the meaning of Section 509(a) of the Code.
- The Grace and Franklin Bernsen Foundation provide grants primarily within the metropolitan Tulsa area in support of religious, charitable, scientific, literary or educational purposes.
- Grant applications for programs and projects that will provide a defined benefit such as capital projects, building programs, specific program needs or ongoing operations from time to time are all considered.
- Grant applications from elementary or secondary education institutions will be considered only if they involve programs for at-risk, handicapped or learning-disabled children; or if they are innovative and apply to all schools in the system.
- The Foundation will only review one grant request per agency during our fiscal year (October 1 to September 3).

THE GRANT APPLICATION PROCESS

- Applicant should submit a narrative summary no more than three pages in length. This letter should be addressed to the Trustees of the Foundation.
 - Please do not use type smaller than 10.5 point.
- Grant applications should contain the legal name of the organization and its current address and telephone number.
- The grant application should be signed by the chief executive officer of the organization and should include the name, title, telephone number and e-mail address of the person designated as the primary proposal contact.
- The Applicant should give a brief description of the organization and the proposed program in need of funding, including an explanation of its importance and a clear statement of its goal.
- The Applicant should include the amount of grant sought from the Foundation.
- The Applicant should cite the financial need, including any other sources of funds.
- The Trustees may also ask the grantee to provide a written assessment of any project the Foundation helps to fund.
- A grant may require matching funds to be raised by the recipient.
- The Foundation will often schedule a site visit after receipt of a grant application. Knowledge of the grantee is of critical importance in the approval process.

PROPOSAL ATTACHMENTS

The following information should be attached to the summary letter and all attachments should be in printed format.

- Documentation of the organizations non-profit and tax exempt status from the Internal Revenue Service
- A List of current Officers and Board of Trustees/Directors. (Please do not give bios of these individuals.)
- Most recent audited financial statement (or last year's IRS Form 990 filed and the last fiscal year's internal financial statement if audit is unavailable).
- Current year-to-date financial statements and budget.
- Project budget detail (if applicable).
- A statement as to how the agency plans to support the project after the grant period.
- Any other relevant supporting materials. (Note: the Foundation does not need copies of any Oklahoma tax documents, certificate of incorporation or Bylaws.)
- DO NOT include DVDs, CDs, bound books or bulky leaflets or letters of support.

FUNDING RESTRICTIONS

- Applications will not be considered if they do not have a 501(c)(3) public charity status from the IRS.
- Applications will not be considered if the required documents are not attached.
- Applications from individuals are not accepted.
- Applications for continuing support for the same program.
- The Foundation discourages applications for general support or reduction of debt, or for continuing or additional support for the same programs, although a single grant may cover a period of several years.

DEADLINES

- Application may be made at any time for support of activities consistent with the Foundation's guidelines.
- The Foundation's Board meets monthly to review grant applications.
- Applications received on or before the 10th day of the month (unless the 10th falls on a Saturday, Sunday, or a holiday, in which event applications are due on the preceding business day) preceding a next regularly scheduled Board meeting are normally considered at such meeting, provided that all requested information has been provided.

ANNOUNCEMENT OF DECISIONS

- Proposals are typically processed within two months.
- Generally, an applicant will be advised of the Foundation's action on a proposal within a week following the Trustees' meeting.
- Board decisions on all applications are reported in writing by mail or personal visit.

SUBMITTALS

- Applications and supporting documents may either be hand delivered or sent by regular mail to the following address:

The Grace and Franklin Bernsen Foundation
15 West 6th Street, Suite 1308
Tulsa, Oklahoma 74119-5407

- Send only one copy.
- Please do not submit proposals in plastic covers, binders, or sheet protectors.
- **E-mail a copy of the executive summary in Word format to gfbernsen@aol.com.**

Please direct all grant application correspondence to:

The Grace and Franklin Bernsen Foundation
15 West 6th Street, Suite 1308
Tulsa, Oklahoma 74119-5407
(918)584-4711 (Phone)
(918)584-4713 (Fax)
E-Mail: gfbernsen@aol.com