

The HS Lopez Family Foundation

General Grant Guidelines

The HS Lopez Family Foundation grant making process is conducted by the Board of Directors in an impartial manner based upon an evaluation of each project request. Therefore, solicitation of individual members of The HS Lopez Foundation Board of Directors by potential recipients for specific grant requests is discouraged.

Priorities for funding will vary from time to time. Even though a project meets established criteria, it may not be adopted because of limited funds or other priorities.

The HS Lopez Family Foundation grants do not merely provide funds to an existing project, however worthy. To be eligible for consideration, projects must be sponsored by a governmental unit or non-profit charitable organizations which are tax exempt under section 501 (C) 3 of the Internal Revenue Code. Projects must have the support of appropriate organizations and/or government units in the community where the project is to be carried out. The following criteria have been established by the Board of Directors of The HS Lopez Family Foundation.

The grant/project must:

1. Be applicable to one of the following categories: health, education or welfare.
2. Reasonably ensure continued support after involvement by The HS Lopez Family Foundation.

3. Not involve liability to The HS Lopez Family Foundation except to provide the amount of the grant and oversight of use of funds.
4. Involve active participation by the sponsor which must be a governmental unit or non-profit tax exempt charitable 501 (C) 3 organization, institution or association.
5. Demonstrably benefit others beyond the individual organization recipient of the grant.
6. Not benefit a Director or employee of The HS Lopez Family Foundation; or a spouse, a lineal descendent (child or grandchild by blood or any legally adopted child), a spouse of a lineal descendant or an ancestor (parent or grandparent by blood) of any living Director or employee of The HS Lopez Family Foundation.
7. Not duplicate any existing Foundation grant.
8. Not involve the purchase of land or payment of general administrative costs for the sponsoring organization.
9. Not involve the establishment of a permanent foundation or trust or a permanent interest-bearing account, or involve support for the general operating costs of any organization.
10. Not involve any of the following:
 - carrying on propaganda or otherwise attempt to influence legislation.

- Restrict the services or facilities or employment provided by the grant to individuals based on race, creed, color, sex or national origin.

11. Be located in the greater Pima County area or geographic area in which a family Board Member resides or impacts or be “linked” to the described areas.

Additional Grant Making Guidelines:

- If your grant request includes new equipment, please investigate whether reconditioned and/or used equipment can be substituted.
- First-time grants normally shall not exceed twenty five percent (25%) of the approved budget.
- Deadlines for receiving of proposals are **June 1 and December 1**; applicants will be notified in August or February. Submissions by fax or e-mail are not accepted.
- Proposals **MUST** include a **ONE-PAGE** cover sheet with the following information:
- Organization must have a history of five years.

1. Name, address, telephone, and fax numbers of your organization;
2. Name, title, and telephone number of your contact person;
3. Brief description of the organization;
4. Amount requested: and
5. One paragraph summary of the purpose of

the requested grant.

The full proposal **MUST** contain:

- A full description of the purpose of the grant and expected accomplishments
- A detailed budget showing how the grant funds would be spent within the project budget:
- Financial statements of **actual revenue and expenses** of your organization for the previous fiscal year, and a balance sheet (need not be audited);
- **A copy of your IRS determination letter**, or an explanation of your tax-exempt status;
- **A list of foundations** who have made grants in the previous fiscal year, and the amount;
- Additional information, such as brochures, newsletters, or newspaper clippings.

We reserve the right to make a site visit before and after the award. Within nine months of the grant, recipients must provide a brief written report to the Foundation on how the funds were used. **New proposals** will be considered no earlier than nine months after a grant is made.

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