

## KATY SHARES

### 2023 GRANT APPLICANT GUIDELINES

Applications open: **JUNE 1, 2023**, Applications due by: **NOVEMBER 30, 2023**. *In the spring of 2023, we plan to award grants.*

#### **Grant Criteria:**

**Application Deadline** –All completed grant applications must be received at [info@katyshares.org](mailto:info@katyshares.org) by **midnight on November 30, 2023**. Once a Grant Application is submitted, the applicant is not allowed to make revisions of any kind. **No extension of this deadline will be granted.**

**Non-Profit:** The requesting organization must exist as a non-profit that serves those in need in the west Houston area. The organization may not be a church.

**Mission Alignment:** The Katy Shares Board will examine the correlation between the mission of Katy Shares and the mission of each grant applicant as a means of evaluating each application. Please read our mission statement carefully.

**Our Mission Statement:** To provide financial resources to West Houston charities that impact the local community.

**Geographic Restriction:** The request must be for an organization that serves in the west Houston area including but not limited to Katy, Brookshire, Fulshear, Sealy, Sugar Land, etc.

**Tax Exemption:** The grant applicant must have been in possession of a 501(c)3 Internal Revenue Exemption letter for two years prior to the date of the application.

**Grant Request:** Requests will only be considered if they are for funding a new initiative or expanding an existing program with funding needs after June 2024. Grant recipients should spend the funds from Katy Shares within 12 months of receipt. The applicant must demonstrate that the request for funding does not include an amount exceeding 20% of the total grant request for non-program funding. For example, proposals to fund advertising and marketing of the organization, consultant fees, non-program salaries, and temporary employee salaries may not exceed 20% of the grant request amount.

**Capital Campaigns and Endowments:** Katy Shares will only consider support for capital campaigns if the request is to fund a specific component of the campaign. Katy Shares does not fund endowments.

**Grant Applicant's Board of Directors:** Grant applicants are required to submit the names and occupations of their board members. No minimum number of directors is required for consideration. At least one board member is required to be present at the Spring Katy Shares Dinner Meeting, Site Visit, and Awards Luncheon. (See Calendar)

**Frequency of Grants:** Previous grant winners may reapply with Katy Shares two full years after they receive a grant.

Year 1: Grant funded

Year 2: Not eligible

Year 3: Not eligible

Year 4: Eligible to submit a new grant application

**Request Format & Submission:** All completed grant applications must be sent via email to [info@katyshares.org](mailto:info@katyshares.org). In addition to documents requested with each application (see Grant Applicant Checklist), you must use the following forms provided on the Katy Shares website ([katyshares.org](http://katyshares.org))

## Grant Applicant Requirements

**Initial Board Visit:** A Katy Shares Board Member will contact the organization for an in-person visit to the organization in January 2024.

**Applicant Presentation:** Four finalists will be chosen by February 1, 2024. These finalists must make a seven-minute presentation at the Fall Katy Shares Pitch Meeting in February 2024. At least one board member from your organization is required to be present.

**Site Visit:** After the Fall Katy Shares Pitch Meeting, Katy Shares will contact each of the Four Finalists to arrange a Site Visit. All members are invited to this 1-hour presentation. Site Visits will take place in February. At least one board member from your organization is required to be present.

**Awards Luncheon:** Selection and notification of the Grant Recipient(s) will be made on March 15, 2024. Grant Recipients will attend the Awards Ceremony in April 2024. At least one board member from your organization is required to be present at the Awards Ceremony.

**Progress Reports:** Grant Recipient(s) is required to send two progress reports to the Katy Shares Board within the 12 months after the grant is awarded. The first report is due on or before September 1, 2023, and the second report is due on or before February 15, 2024. Reports must be submitted via email to [info@katyshares.org](mailto:info@katyshares.org)

## Grant Notifications

All applicants will be notified when their Grant Application is received. They will be notified in December 2023 if they were selected as one of the Four Finalists. Notification of the Grant Recipient(s) will be made in January 2024.

## Questions

Please direct all questions to [info@katyshares.org](mailto:info@katyshares.org).

Thank you for your interest in applying for a grant from Katy Shares!

## 2023/24 KATY SHARES GRANT APPLICANT CALENDAR

October 1 --> Member Breakfast (open to all members)

November 30 --> Last Day to Submit Grant Application

December 31 --> Last Day to Donate for Current Year

January 2024 --> Grant Applicant In-Person Visits (board members)

February 1 --> 4 Finalist Vote (online)

February 15 --> Finalist Pitch Lunch (open to all members)

February 31 --> Grant Vote Dinner (open to all members)

March 15 --> Grant Winner Notified

April 1 --> Member Dinner and Grant Award Ceremony (open to all members)

June 1 --> Grant Funds Disbursed

## GRANT APPLICANT CHECKLIST

- 2023/2024 Grant Application
  - Financial statement or annual Operating Budget summary
  - Detailed budget for 2023 or the current year budget with variances, including other sources of funding
  - Detailed Grant Project Budget
  - Copy of 501(c)3 IRS Letter cover page
  - IRS Form 990
  - Auditor's report
  - List of Board of Directors
- Note occupations and years served on board