

**GRANT APPLICATION**  
(for Charitable Organizations)

FOR

**BIG JOY FOUNDATION**

Big Joy Foundation (the "Foundation") is a Colorado non-profit corporation organized and operated exclusively for charitable, scientific, or educational purposes within the meaning of Internal Revenue Code section ("IRC §") 501(c)(3).

A. Identification

1. Name of grant applicant \_\_\_\_\_

2. Address \_\_\_\_\_

3. Telephone number (\_\_\_\_) \_\_\_\_\_

4. Email address \_\_\_\_\_

5. Name and address of person with whom communication will be conducted (if different from that of grant applicant).

Name and title \_\_\_\_\_

Address \_\_\_\_\_

Telephone number (\_\_\_\_) \_\_\_\_\_

Email address \_\_\_\_\_

In order for us to process your application, you must sign the following statement:

The information provided on this page and on the following pages is furnished in consideration of a proposed grant, and it is intended that it may be relied upon, by the Foundation as of this date. The applicant will notify the Foundation of any material change in the information provided herein.

Signed \_\_\_\_\_ (Designate position in grant-applicant organization if applicable)

Name of grant-applicant organization \_\_\_\_\_

Date \_\_\_\_\_

B. Tax-Exempt Status

1. Is your organization exempt under IRC § 501(c)(3) (or under an equivalent section of a Revenue Act of a nation or territory other than the United States)?

yes  no

Date of exemption ruling \_\_\_\_\_

--Attach copy of ruling--

2. Is your organization a public charity by virtue of its being an organization described in IRC § 509(a) (or the equivalent section of a Revenue Act of a nation or territory other than the United States)?

a.  yes  no

b. Classification (check one of the following if you checked "yes" to "a" above)

IRC § 509(a)(1)  IRC § 509(a)(2)

IRC § 509(a)(3) \_\_\_\_\_ (other: describe)

c. Grants to certain public charities classified as "supporting organizations" under IRC §509(a)(3) are subject to new limitations, effective for grants made after August 17, 2006. Accordingly, if your organization is a supporting organization we will request additional information before processing your application.

3. If your organization has been described as either IRC § 509(a)(1) organization described in IRC § 170(b)(1)(A)(vi) or IRC § 509(a)(2) organization, will the amount of funds requested under the grant application adversely affect your organization's status as a publicly-supported organization.

yes  no

If the answer to 3 is no, please estimate the percentage of total qualifying public support that your organization has received over its past four fiscal years from:

a. contributions from the general public \_\_\_\_\_%

b. grants from governmental units \_\_\_\_\_%

c. grants from other charities \_\_\_\_\_%

d. receipts from exempt function income  
(applicable for IRC § 509(a)(2) organizations only) \_\_\_\_\_%

e. investment income \_\_\_\_\_%

### C. Applicant History

1. Please describe your organization's background, including its purpose, size, inception, past grants, past activities and any other information you believe will help us to understand your aims. Attach additional pages for purposes of completing this section. You may also enclose any material (e.g., newspaper articles, brochures, etc.) that provides further relevant detail about who you are.

### D. Purposes and Nature of Requested Grant

Please describe in detail the specific purposes for which the grant requested will be used. You should attach additional pages for this section. Your response should include the following information:

1. Your proposed program or project - its goals, who it will serve, and anything else you think might assist us to understand your purpose. If the funding is requested for an ongoing project or program, please describe it and the result to date.

2. Funding the program - what is the grant amount requested? You may approximate the amount within a range, e.g., \$10,000 - \$12,500. If you have other present sources of funds for portions of your program or project or, if you are currently asking other funding sources for support, give this information. Please explain how funds from us will be used. For this purpose, you should include a budget of overall expenses, or use another form of allocation, and itemize the portion requested from us.

3. Personnel - list the personnel who will work on the project or program, and give the qualifications of those who will play a key role in its operations.

4. Timetable - show the timetable you have set to achieve your goals.

Organizations experiencing difficulty in assembling the required information may write to Shawna Schultz at [sschultz@bigjoyfoundation.org](mailto:sschultz@bigjoyfoundation.org) for assistance without fear of prejudicing the eventual outcome of the application.

#### E. Mailing of Application

All applications should be either mailed to the following address:

**Big Joy Foundation  
839 Rossum Drive  
Loveland, CO 80537**

Or, e-mailed to the following e-mail address:

**[info@bigjoyfoundation.org](mailto:info@bigjoyfoundation.org)**

No original documents should be sent to us. We are not responsible for returning to you any portion of the applications or material attached thereto.

#### F. Processing the Grant Application

First, your application will be reviewed carefully and discussed by our Reviewing Committee (the "Committee"). The Committee may contact you for more information or, possibly, ask for a meeting with you. When the members of the Committee have thoroughly assured themselves that they understand what you hope to accomplish with the proposed grant, they will evaluate your proposal in the light of other applications for available funds and make a recommendation to our Board of Directors.

The members of the Board of Directors evaluate each proposal independently, take the Committee's recommendations into their considerations, and vote either to approve (with or without conditions), to reject, or to table the grant proposal. The results of the Board of Directors' review will be communicated to you as soon as possible. Any grant approved will be administrated according to the instructions of the Board of Directors.

#### G. Grant Monitoring

The trust placed in Big Joy Foundation - by its own donors and contributors and its status as a tax-exempt charitable organization - requires the highest fiscal integrity. We have been given the "stewardship" of charitable dollars; in return, we are expected to ensure their proper and lawful use by our grantees.

Our requirements from grantees are simple. First, the grant must be used in accordance with the purposes set forth in the grant proposal, for purposes clearly identifiable as charitable under applicable federal and state laws. Any variation from the proposal must be approved in advance by us. Secondly, where projects or programs are operated for less than anticipated budgeted figures, all excess (unexpended) funds must be returned to us. And thirdly, all grant recipients must submit a "mid-term" and final narrative report describing the progress of the program or project, as well as financial reports on how the appropriated funds are being used. These reports are reviewed by us to see if the program or project is progressing as anticipated and to verify that the expenditures are in accordance with the grant proposal. If these reports are not submitted or reflect discrepancies, the additional distribution of funds will be held in abeyance until satisfactory reports are received or the discrepancy is removed. If

possible, some of our members will try to meet with the grantee (or with one or more of its representatives) and to visit the project or program site.

Sometimes, we will call for an independent audit, and on rare occasions, it may be necessary to cancel a grant entirely. Such action, however, is highly undesirable for us as well as for the grantee. Big Joy Foundation, however, must always stand firmly on its obligation to ensure that all grants are spent solely in furtherance of the charitable purposes for which the funds were given to us. To do otherwise, would be to fail the public trust that our donors and contributors have invested in us.