

THE CARL GELLERT AND CELIA BERTA GELLERT FOUNDATION

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E-GRANT APPLICATION SYSTEM

2017 Guidelines and Submission Requirements

Deadline: Tuesday, August 15, 2017

The following are **not funded** by the Foundation – (1) individuals, (2) organizations which do not have proof of current IRS 501(c)(3) tax exempt status AND classification as a public charity under Sections 509(a)(1) and 170(b)(1)(A) of the Internal Revenue Code (IRC), or 509(a)(2), or 509(a)(3), types I or II, (3) fiscal sponsors, (4) private foundations, and (5) organizations outside the nine counties of the San Francisco Bay Area. In addition, the Foundation does not fund sponsorships or fund-raising events such as dinners, walk-a-thons, tournaments, fashion shows, etc., or lobbying and attempts to influence legislation.



Overview

1. Go to the Foundation website, www.gellertfoundation.org.
2. Click on the link, “ACCESS THE E-GRANT APPLICATION SYSTEM HERE” which will bring you to the Foundation Logon Page.
3. **(1) NEW APPLICANT:** If you are a first time applicant in the online system, click on the button labeled, **Create New Account**. A tutorial is available on the Foundation Logon Page, as well as at www.gellertfoundation.org. **(2) PREVIOUS APPLICANT:** If you have accessed this E-Grant Application System before, you will log-in with the SAME email address and password you used previously when creating an account. Click on **Log On** after entering your information. **IMPORTANT:** Your credentials (email and password) do not change unless you change them or ask us to reset them. If you are uncertain of your account status please email Rosa King, Program Officer, at info@gellertfoundation.org or call her at (650) 985-2080 to inquire. It's best to avoid duplication.
4. **NEW APPLICANT:** The registration process has multiple steps you must complete before you can apply to the Foundation. Required fields are denoted with an (*). If a required field is left blank on the Registration Form, the E-Grant System will not process the request.
5. **BOTH** new applicants and previous applicants choose “Apply” on the navigation menu once you are logged onto the foundation’s online grants management system and then click on the blue “Apply” link under “The Carl Gellert and Celia Berta Gellert Foundation Grant 2017” section in order to be directed to the application page.
6. Once on the application page, answer all of the application questions pertinent to your organization and submit the completed application no later than Tuesday August 15, 2017.
7. If you have any other questions, please refer to the “E-Grant Application Questions” document on the Foundation website, www.gellertfoundation.org.

Please submit, at the **same time**, your saved application, proposal, and requested / applicable materials via the online grants management system.

- All documents submitted via online **MUST** include the name of your organization.
- All documents submitted via online **MUST** be submitted in the requested format **AND** labeled accordingly for clarity (i.e. full proposal, budget for project, audited financial statements, etc.). See chart below for more information.
- Your application will **ONLY** be considered complete once we receive **ALL** of the requested materials.

Guidelines and Submission Requirements

PROPOSAL PARTS	Submitted via Online (Format)	Appropriate Label for Online Attachment Submission (abbreviation, if necessary)
Full Proposal	 or 	Organization name_Full Proposal
501(c)(3) - TAX EXEMPT CLASSIFICATION DOCUMENTATION 509(a)(1) - NOT A PRIVATE FOUNDATION DOCUMENTATION 170(B)(1)(A)-PUBLIC CHARITY DOCUMENTATION		Organization name_501c3 Status
Budget for Project	 or 	Organization name_Budget for Project
Form 990 or 990EZ		Organization name_Form 990 Organization name_Form 990EZ
Receipt of 990N filing		Organization name_990 N Receipt
Audited Financial Statements		Organization name_Audited Financials
Profit and Loss Statement		Organization name_P&L Statement
Balance Sheet		Organization name_Balance Sheet
Exempt from filing Form 990 or Form 990EZ document	 or 	Organization name_990 Exemption letter

Our Foundation’s policy is to promote exclusively religious, charitable, scientific, literary or educational purposes, restricted to local giving in the nine counties of the greater San Francisco Bay Area - Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma.

Completed grant requests with all items listed on pages 3-6 (**even if you have submitted a proposal to us in prior years**) that are received through the foundation’s online grants management system by Tuesday August 15, 2017 will be considered by the Board of Directors. Electronic submissions are accepted **ONLY** in the outlined format contained in these guidelines.

Please submit any questions:

Attention: Rosa King, Program Officer
info@gellertfoundation.org

Applications and proposals are encouraged throughout the year. **However, due to the high submission of requests on or near the deadline day, only those requests received via online by Friday August 4, 2017 will be reviewed for completeness prior to the actual deadline date of Tuesday August 15, 2017.**

In fairness to all applicants, no exceptions will be made to the stated requirements or deadline.

All submissions, whether complete or incomplete, will be acknowledged in writing only. After requests have been considered, funds are generally distributed near the end of December, as approved by the Board. Notification of Board decisions is automatically made to all applicants in writing only.

PLEASE SUBMIT ONE COPY OF ITEMS 1 - 4 VIA THE ONLINE GRANTS MANAGEMENT SYSTEM NO LATER THAN TUESDAY AUGUST 15, 2017.

Please note that the name of the organization applying for a grant must be consistent on all required documentation (Application, Letterhead, Form 990/990EZ/990N, etc.); the tax ID number/EIN must also be the same on all documentation; AND all documentation must show the address of your organization to be within one of the nine counties of the San Francisco Bay Area.

IMPORTANT

(PLEASE CONFIRM THAT YOUR ELECTRONIC AUDITED FINANCIALS AND FORM 990 or FORM 990EZ ARE NOT PASSWORD PROTECTED BEFORE SUBMISSION TO THE FOUNDATION)

1. ONLINE APPLICATION

Submission: to be submitted via online

ALL line items on this online application form marked with an asterisk must have an entry. Please do not leave any lines blank, or enter "refer to proposal", or enter "see attached" on any lines. All information required on this form is limited to the space provided. Additional information may be provided with the full proposal requirement.

Recreated or modified (cut and paste, scanned, etc.) applications, even if similar to our online application questions provided to you WILL NOT BE ACCEPTED.

ONLINE APPLICATION FORM ATTACHMENTS

2. FULL PROPOSAL



Required Format:

Submission: to be submitted via online

One proposal, not to exceed 5 pages, excluding Items 1, 3, and 4 of these guidelines, to include the following format:

- A. A brief history and statement of the current goals and activities of the organization.
- B. A brief outline of the project and phase of project for which the organization seeks funding, showing
 - Demonstration of need
 - Population served
 - Specific objectives and outcomes
 - Timeline of the project
 - Amount of funding required for the project, and
 - Specific amount of funding (*no ranges*) requested from our Foundation.
- C. Other funding/revenue sources (projected and committed)
 - Please provide a list of other funding sources (status of pending and committed request(s)) for the project for which you are requesting funding for from the Foundation.

Since you know your priorities, we require that you select one project and the request amount when you submit the application for your organization. Please refer to the prior recipients section at our website to see if your project might fit within our areas of interest.

3. 501(c)(3) - TAX EXEMPT CLASSIFICATION 509(a)(1), 509(a)(2) - NOT A PRIVATE FOUNDATION and 170(B)(1)(A)-PUBLIC CHARITY DOCUMENTATION



Required Format:

Submission: to be submitted via online

The Foundation requires proof of your organization's 501(c)(3) status with the following documents:

- A. Copy of IRS tax exemption letter. If you do not have your own tax exemption letter, submit requested document in section B. below.
- B. A clearly legible copy of the page in the most recent "Official Directory" of the group that lists your organization, with your organization's name highlighted. For example, if you are part of a Catholic group ruling, this requirement may be satisfied with a copy of the page in the **current** "Official Catholic Directory" which lists your organization, **with your organization's name highlighted** on the copy submitted. (This documentation is only required for organizations included in a Group Ruling)
- C. If your group does not have an "Official Directory", you must submit a copy of the Group Ruling letter which indicates 501(c)(3) tax exempt status for the group AND documentation from the IRS specifically listing your organization's inclusion within this group ruling. The name listed on our application form and the entity listed in the group ruling directory should be the same. **This option should only be used if you DO NOT have an "Official Directory"**.

4. FINANCIAL REPORTING

A. ALL APPLICANTS

1. **Budget** for the **Project** for which you are requesting funding



Required Format:
Submission: to be submitted via online

AND

B. FORM 990 or FORM 990EZ FILERS

1. One copy of the most recently filed Form 990 or 990EZ of the organization applying for a grant. The Form 990/990EZ must be a complete copy as submitted to the Internal Revenue Service, including Schedules A and B, as well as all other attachments, statements, and schedules referenced in the Form 990/990EZ.



Required Format:

(PLEASE CONFIRM THAT YOUR ELECTRONIC FORM 990 or FORM 990EZ IS NOT PASSWORD PROTECTED BEFORE SUBMISSION TO THE FOUNDATION)

Submission: to be submitted via online

C. FORM 990N FILERS

1. A copy of the receipt of 990N filing



Required Format:

Submission: to be submitted via online

AND

2. One copy of your most recent audited annual financial statements, if an audit is conducted.



Required Format:

Submission: to be submitted via online

(PLEASE CONFIRM THAT YOUR ELECTRONIC AUDITED FINANCIALS ARE NOT PASSWORD PROTECTED BEFORE SUBMISSION TO THE FOUNDATION)

If you do not have an audit conducted, submit **both** of the following documents:

- Year to date **Profit & Loss Statement** for the organization applying for a grant



Required Format:

Submission: to be submitted via online

- Year to date **Balance Sheet** for the organization applying for a grant



Required Format:

Submission: to be submitted via online

D. EXEMPTION FROM FILING FORM 990 or FORM 990EZ

If you are exempt from filing Form 990 or Form 990EZ, we require **both** of the following items:

1. Written submission of exemption from filing, as defined by the Internal Revenue Service *General Instructions for Form 990 and Form 990-EZ, Item B-Organizations Not Required to File*, specifically referencing the exemption item in these instructions that applies to the organization applying for a grant. To view these instructions, please visit the IRS website at www.irs.gov. **This letter should be on your letterhead and signed by an officer of your organization.**



Required Format:

or

Submission: to be submitted via online

Example for a Religious School: Please be advised that “ABC School” is exempt from filing Forms 990 and 990EZ because ABC School is a school below college level affiliated with a church or operated by a religious organization.

AND

2. One copy of your most recent audited annual financial statements, if an audit is conducted.



Required Format:

Submission: to be submitted via online

(PLEASE CONFIRM THAT YOUR ELECTRONIC AUDITED FINANCIALS ARE NOT PASSWORD PROTECTED BEFORE SUBMISSION TO THE FOUNDATION)

If you do not have an audit conducted, submit **both** of the following documents:

- Year to date **Profit & Loss Statement** for the organization applying for a grant



Required Format:

Submission: to be submitted via online

- Year to date **Balance Sheet** for the organization applying for a grant



Required Format:

Submission: to be submitted via online