

# **THE J & E BERKLEY FOUNDATION**

## **2014 GIVING GUIDELINES**

### **MISSION:**

The J & E Berkley Foundation is committed to improve the quality of life in greater Charlottesville and its contiguous counties in Central Virginia by supporting programs that help people, nature, conservation – animals and the arts. The Foundation will be attracted to ideas and agencies where measurable success can be identified and tracked.

### **FUNDING CRITERIA:**

- Grant opportunities need to focus primarily on Charlottesville and its contiguous counties in Central Virginia but are not limited to it.
- Preference will be given to high impact ideas with the potential to make a substantial difference in the quality of life for helping people, nature, conservation – animals and the arts.
- Program funding is preferred, but startups, operating expenses for new and existing programs relate to an issue of interest to the foundation may be approved. Innovation is encouraged.
- The foundation is not interested in physical plant or construction projects; rather, we wish to promote programs, which seek to eliminate social and environmental problems before they occur.
- Entrepreneurial ideas with the potential for success are encouraged.

### **GRANT APPLICATION PROCEDURE:**

Applications will be reviewed at the meetings of The J & E Berkley Foundation board of directors. Notification of awards will be made at a time following the meetings.

All application materials should be submitted via mail.

**Applications should include the following:**

- Completed information sheet and summary block (on next page)
- History/description/mission of org (further detail beyond summary block)
- Description of program (400 words or less, must include your request for funds and its relationship to your organization)
- Expected outcomes (further detail beyond summary block)
- How outcomes will be measured
- Budget of program
- Financials (current 990) and audit (most recent) of your organization
- Proof of 501(c)(3) status
- List of current board members
- Supporting documentation:
  - 1 A list of other grants or sponsors of your program.
  - 2 Photographs, brochures, press reprints and annual reports that pertain to your organization or to this project.

**Submit all materials to:**

Chris Pasmore, Executive Director  
J & E Berkley Foundation  
5281 Sugar Ridge Road  
Crozet, VA 22932  
Phone: 434-961-3399

# Grant Application Summary

## THE J & E BERKLEY FOUNDATION

(Complete both sections)

General Information

Date Prepared: \_\_\_\_\_

Applicant name (organization): \_\_\_\_\_  
(Legal name of organization, same as IRS)

Address: \_\_\_\_\_  
(Street address, City, State, ZIP)

Contact person: \_\_\_\_\_ Position: \_\_\_\_\_

Phone: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_ E-mail: \_\_\_\_\_

Year agency founded: \_\_\_\_\_ Agency annual operating budget: \_\_\_\_\_

Geographic area served by this request (county (ies)/state(s)): \_\_\_\_\_

Agency director (if different from contact): \_\_\_\_\_

Total project budget: \$ \_\_\_\_\_ Dates of the project: \_\_\_\_\_

### Board Summary

**Organization:**

{Enter the official name of your organization here}

**Project name:**

{Enter the official name of the project here}

**Funding:**

{Enter the amount you are applying for here}

**Brief description:**

{In two or three short sentences describe what your organization does, then in a BRIEF paragraph, describe the project for which you are requesting funding. What exactly will the project do and why should the project be completed?}

**Expected outcomes:**

- This should include specific actions that will be taken to accomplish the project as well as answer the following two questions, one sentence each:
  - ★ What will be the immediate impact of this program?
  - ★ What will be the long-term impact of this program?

**Why recommended:**

{Why should this grant be recommended to the board}