

# 1a. Organization Summary

---

Organization Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Web: \_\_\_\_\_

Executive Director: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Grant Proposal Contact (if different from above):

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Is your organization an IRS 501(c)(3) nonprofit?  Yes  No EIN#: \_\_\_\_\_

*If no, please fill out the Fiscal Agent information:*

Fiscal Agent Organization Name: \_\_\_\_\_ EIN#: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Web: \_\_\_\_\_

Organization Mission (**50 words or less**): *For arts projects, describe the project and artist (filmmaker, theater group, etc.)*

Current Year Organizational Budget (do not include the budget of your fiscal sponsor, if any): \_\_\_\_\_

Total 2014 Organizational Budget (do not include the budget of your fiscal sponsor, if any): \_\_\_\_\_

# of Staff: \_\_\_\_\_ # of Volunteers: \_\_\_\_\_ 1st Year of Organization's Service (year only): \_\_\_\_\_

# of People Organization Serves Yearly: \_\_\_\_\_

Is your organization: LGBT Primary?  Yes  No People of Color Organization?  Yes  No

# 1b. Request Summary

---

Organization Name: \_\_\_\_\_

Project Name (if different from organization name): \_\_\_\_\_

Amount Requested: \$ \_\_\_\_\_ Organization/Project Budget: \$ \_\_\_\_\_

Priority area for which funds are being requested (please check no more than TWO):

- Policy/Advocacy/Systems Change     Securing LGBT Equality     Racial Equity  
 Increasing Giving \*     LBT Health and Empowerment  
 Leadership Development \*\*     LGBT Aging \*\*

\* This priority area applies to LGBT organizations with budgets over \$1 million. No other organizations may apply under this priority.

\*\* You may select one of these priority areas, but please be aware that they are not a focus of the Community Issues grants in 2015 because they are being addressed through other program areas,

Will grant funds be used for general operating costs?     Yes     No

If you are not an LGBT-primary organization or the answer is no, please describe the project for which you are requesting funds in 50 words or less (this is the contract language we will use in your grant agreement if your proposal is funded):

Populations Served by Program/Organization:

Brief description of the specific population targeted (if any) by the organization/program for which funding is sought (age, gender, ethnicity, etc.) *(for arts projects, describe the audience for the project)*:

Number of people to be served by the organization or project for which funding is sought *(for film/theater/arts projects, describe potential venues for the work if not specific numbers)*. *Note: this does not apply to organizations with budgets over \$1M applying for a fundraising project.*

# 1c. Demographic Summary

Organization Name: \_\_\_\_\_

**ALL:** Please fill out to the best of your ability. *If you are an LGBT-specific organization seeking general operating support, skip column D.*

|                           | A) Board |   | B) Staff |   | C) Populations served<br>by your agency (%) | D) Populations to be served<br>by project to be funded (%) |
|---------------------------|----------|---|----------|---|---|--|
|                           | #        | % | #        | % |   |  |
| <b>RACE/ETHNICITY</b>     |          |   |          |   |   |  |
| African American/Black    |          |   |          |   |   |  |
| Asian/Pacific Islander    |          |   |          |   |   |  |
| Hispanic/Latino           |          |   |          |   |   |  |
| White (Non-Hispanic)      |          |   |          |   |   |  |
| Native American           |          |   |          |   |   |  |
| Multi/Biracial            |          |   |          |   |   |  |
| Other: _____              |          |   |          |   |   |  |
| <b>GENDER</b>             |          |   |          |   |   |  |
| Female                    |          |   |          |   |   |  |
| Male                      |          |   |          |   |   |  |
| Intersex                  |          |   |          |   |   |  |
| Transgender               |          |   |          |   |   |  |
| Other: _____              |          |   |          |   |   |  |
| <b>SEXUAL ORIENTATION</b> |          |   |          |   |   |  |
| Gay                       |          |   |          |   |   |  |
| Lesbian                   |          |   |          |   |   |  |
| Bisexual                  |          |   |          |   |   |  |
| Heterosexual              |          |   |          |   |   |  |
| Other: _____              |          |   |          |   |   |  |
| <b>AGES</b>               |          |   |          |   |   |  |
| 0-12                      |          |   |          |   |   |  |
| 13-18                     |          |   |          |   |   |  |
| 19-24                     |          |   |          |   |   |  |
| 25-39                     |          |   |          |   |   |  |
| 40-54                     |          |   |          |   |   |  |
| 55+                       |          |   |          |   |   |  |

| GEOGRAPHIC AREAS SERVED                    | C) Populations served<br>by your agency (%) | D) Populations to be served<br>by project to be funded (%) |
|--|---|--|
| Bay Area                                   |   |  |
| California outside the Bay Area            |   |  |
| National                                   |   |  |
| International                              |   |  |
| <b>OVERALL TOTAL (should add to 100%)</b>  |   |  |
| <b>Your work within the Bay Area:</b>      |   |  |
| Alameda                                    |   |  |
| Contra Costa                               |   |  |
| Marin                                      |   |  |
| Napa                                       |   |  |
| San Francisco                              |   |  |
| San Mateo                                  |   |  |
| Santa Clara                                |   |  |
| Solano                                     |   |  |
| Sonoma                                     |   |  |
| <b>BAY AREA TOTAL (should add to 100%)</b> |   |  |

## 2. Proposal Narrative

---

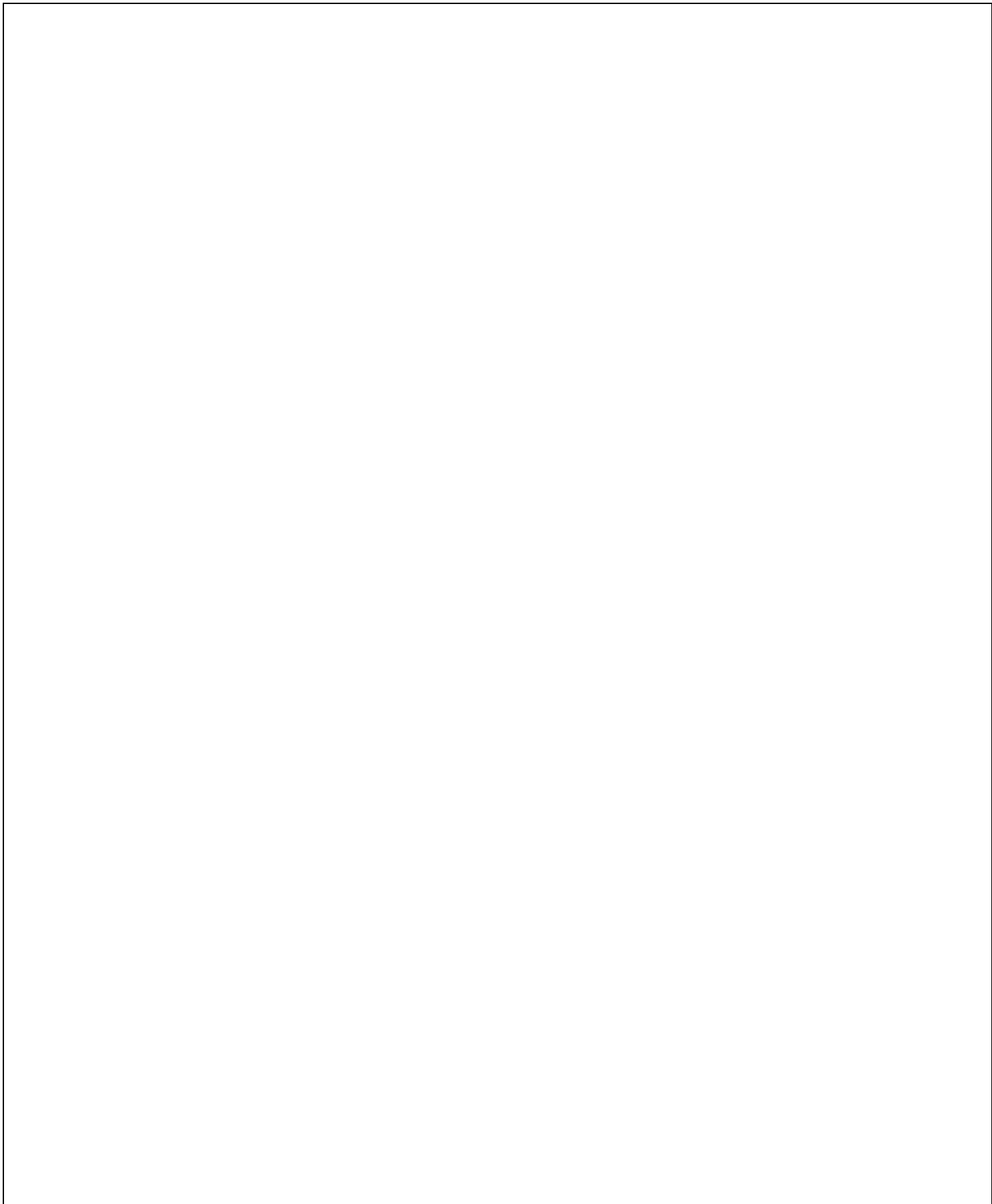
Organization Name: \_\_\_\_\_

Your narrative should be no more than three pages (using at least 12-point font). Shorter narratives are welcome.

Please address the set of items in your narrative that are listed under the type of support you are seeking in the 2015 Community Issues RFP:

Organization Name: \_\_\_\_\_

Organization Name: \_\_\_\_\_



### 3. Update on 2014 Funding

---

Organization Name: \_\_\_\_\_

*If your organization received a 2014 Community Issues grant, please provide an update and include the grant number.*

Please use no more than ONE page. Shorter updates are welcome. As applicable, please briefly describe your progress against the objectives expressed in your grant. Also tell us how successful your activities have been to date; how you made that assessment; and whether you expect your achievements to differ from the goals you set out in your 2014 proposal. Finally, please describe any major organizational and/or programmatic changes you have experienced (or expect) during the current grant period.

A full final report on 2014 Community Issues grants will be expected by November 14, 2015. See the [Community Issues Final Report Guidelines](http://www.horizonsfoundation.org) on Horizons' website ([www.horizonsfoundation.org](http://www.horizonsfoundation.org)).

**Grant Number:**

**Update:**

# 4a. Organizational Financial Information Sheet

Organization Name: \_\_\_\_\_

Organization's Annual Budget (2015): \_\_\_\_\_ Fiscal Year Period: \_\_\_\_\_ (month) to \_\_\_\_\_ (month)

Do not fill in lines that are not relevant to your organization. Individual **film projects** may skip this page and use the Project Budget Worksheet.

**IMPORTANT:** Where necessary, please attach a separate sheet with **budget notes**, numbered to correspond with the items below. Please describe any figures that are not self-explanatory: for example the nature of in-kind contributions or pending grant proposals. Please also explain your plans if you are operating in a deficit.

**REVENUE:**

*Please do not include in-kind support here but list in a budget note.*

|  | 2015<br>(current FY) |
|--|----------------------|
| 1. Foundations                                       |                      |
| 2. Corporations                                      |                      |
| 3. Individual donors                                 |                      |
| 4. Government  |                      |
| 5. Earned revenue (sale of tickets, products)        |                      |
| 6. Fundraising activities                            |                      |
| 7. Contracted services                               |                      |
| 8. Other: _____ (please itemize in the budget notes) |                      |
| <b>TOTAL REVENUE</b>                                 |                      |

**EXPENSES:**

|  | 2015<br>(current FY) |
|--|----------------------|
| 9. Salaries and wages (includes benefits, taxes, etc.) |                      |
| 10. Consultants and professional fees                  |                      |
| 11. Operational costs                                  |                      |
| 12. Program costs (if listed on your IRS Form 990)     |                      |
| 13. Marketing and promotion                            |                      |
| 14. Other: _____ (please itemize in the budget notes)  |                      |
| <b>TOTAL EXPENSES</b>                                  |                      |

**CHANGE IN NET ASSETS:**

|   | 2015<br>(current FY) |
|---|----------------------|
| 15. Current period increase or decrease in Net Assets<br><i>This is the difference between your total revenue and total expenses.</i> |                      |



# 4b. Project Budget

Organization Name: \_\_\_\_\_

Project Start Date: \_\_\_\_\_ End Date: \_\_\_\_\_

Do not fill in lines that are not relevant to your project. This page is to be used primarily by non-LGBT organizations, films, or other projects that might be stand-alone.

If necessary, please attach a separate sheet with budget notes, numbered to correspond with the items below. Please explain any figures that are not self-explanatory, for example: any significant increase/decrease from one year to the next, the nature of in-kind contributions, pending grant proposals, or other specifics that might help the panel review your proposal.

**REVENUE:**

*Do not include in-kind support but list any significant such support in a budget note.*

|   | Amount |
|---|--------|
| 17. Foundations                                       |        |
| 18. Corporations                                      |        |
| 19. Individual donors                                 |        |
| 20. Government  |        |
| 21. Earned revenue (sale of tickets, products)        |        |
| 22. Fundraising activities                            |        |
| 23. Contracted services                               |        |
| 24. Other: _____ (please itemize in the budget notes) |        |
| <b>TOTAL PROJECT REVENUE</b>                          |        |

**EXPENSES:**

|   | Project Total Amount | Amount to be paid by Horizons grant |
|---|----------------------|-------------------------------------|
| 25. Salaries and wages (includes benefits, taxes, etc.) |                      |                                     |
| 26. Consultants and professional fees                   |                      |                                     |
| 27. Operational costs                                   |                      |                                     |
| 28. Marketing and promotion                             |                      |                                     |
| 29. Fundraising expenses                                |                      |                                     |
| 30. Other: _____ (please specify in the budget notes)   |                      |                                     |
| <b>TOTAL PROJECT EXPENSES</b>                           |                      |                                     |

31. PROJECT NET (Total Revenue minus Total Expenses) \$ \_\_\_\_\_

*If the expenses for this project are greater than the revenue, please describe in the budget notes how you plan to address the deficit.*

# 4C. Budget Notes

---

Organization Name: \_\_\_\_\_

Where necessary, please provide **budget notes**, numbered to correspond with the items in sheet 4A and 4B. Please describe any figures that are not self-explanatory.

# 5. Certification of Non-Discrimination

---

As part of Horizons Foundation’s due diligence commitments to individual donors, donor advisors, philanthropic partners, and Horizons’ own mission to serve the lesbian, gay, bisexual, and transgender community, we require grantees to complete this form for the foundation, where it is kept on file.

Please check as appropriate:

\_\_\_\_\_ I certify that \_\_\_\_\_ *[organization name]* does not discriminate in regard to race, color, religion, age, sex, gender identity, sexual orientation, marital status, physical disability, political affiliation, veteran’s status, national origin, ancestry, socio-economic status, or source of income in its employment practices, selection of board members, selection of students, or in accepting clients for its services or products or as otherwise provided by all applicable federal, state, and local laws.

Organization: \_\_\_\_\_

Signature of Authorized Officer: \_\_\_\_\_ Date: \_\_\_\_\_

Name and Title: \_\_\_\_\_

Fiscal Agent Organization (if applicable): \_\_\_\_\_

Signature of Fiscal Agent (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

Name and Title: \_\_\_\_\_