

William E. Barth Foundation Guidelines and Deadlines

Guidelines:

It is the policy of the William E. Barth Foundation to give exclusive consideration to grant requests from organizations, which seek to improve the quality of life in Louisville and Jefferson County, Kentucky. Priority will be given to the Louisville community and consideration will be given to organizations operating within Jefferson County, Kentucky. All grant monies received must be used within Louisville, Jefferson County, Kentucky.

Support will only be given to those charitable organizations designated under IRS Code 501(c)(3). **No funding is given to individuals.** A Contribution Request form must be filled out, and supporting documentation must be provided.

The foundation will meet at least once a year in May and at such other times as meetings may be called in accordance with its governing instruments.

Deadlines:

Applications for grant requests are due by May 31 for distributions in the following year. The grants will be reviewed over the next six to nine months, with notification of the acceptance or denial for funding sent in early spring. Organizations receiving funding should expect a check shortly after such notification is received. The amount of funding provided by the foundation will vary each year according to prior commitments of the foundation, investments and various other factors.

Pictures, CDs, maps, etc. may be included in the grant application if such information would be helpful in the review of the project or organization. Each organization may be contacted for a review of the grant application and any additional information needed.

Any and all questions should be directed to Elizabeth Dodd Lococo at elizabeth@doddattorneys.net.

**WILLIAM E. BARTH FOUNDATION
CONTRIBUTION REQUEST FORM**

Year for which funding is requested: _____

General Information

Name of Organization: _____

Address: _____

Website (if any): _____

Organization Phone Number: (____) _____

Contact Person: _____ Phone: _____ Email: _____

Executive Director: _____ Phone: _____ Email: _____

Name of Individual(s) who prepared this grant: _____

Are these individual(s) employed by your organization or privately contracted?

Amount Requested: \$ _____ Total project budget: \$ _____

For the period beginning _____ and ending _____

What percentage of this request will be used in...

Louisville? _____% Jefferson County? _____%

Name of project: _____

Brief project description: _____

Organizational Information

1. Description of organization: _____

2. Purpose and goals of the organization:

3. Do you receive funds from an umbrella organization such as Metro United Way, Fund for the Arts, or other national organization?

Yes No

a. If so, what organization?

b. How long have you received support from this organization?

c. Please indicate the amount and percentage of your budget provided by the umbrella organization.

Amount: \$_____ % of budget:

4. If your organization directs funds to other organizations, please indicate those groups below and the amounts:

5. What other organizations serving residents of Jefferson County, Kentucky, do the same type of work that your organization is requesting funding to do? Please evaluate the effectiveness of your organization as compared to those other organizations.

Project Information

6. Specific program or project for which funding is requested:

7. Please quantify, as much as possible, the impact of the potential funding you are requesting.

What results are you obtaining now without the requested funds? How will the results change if you receive funding?

8. What are the goals of your project (long term and short term)?

9. How will you evaluate the success of your project?

10. How will you report the results of your evaluations to the William E. Barth Foundation?

11. How will you publicly recognize a grant from the William E. Barth Foundation?

12. Have you received a grant from the William E. Barth Foundation in previous years?
_____ Yes _____ No
If yes, please list year, amount given and project the grant funded:

To Be Attached:

1. Proof of 501(c)(3) status
2. Descriptive literature of the organization, its programs, and the specific project or program for which funds are requested.
3. Current year's budget
4. Financial statements (audited, if available) for 3 preceding years.
5. Returns filed with I.R.S. for 3 preceding years
6. List of all financial contributors in excess of \$1,000 for the preceding fiscal year
7. Current list of directors and officers with mailing addresses and phone numbers (specify the title or position of each person listed and the amount of compensation received from your organization during the previous fiscal year)
8. Background information on your organization (e.g. who were the original organizers, how much has the organization grown, why was the organization founded)
9. If your organization has received funding from the William E. Barth Foundation in previous years, please attach documentation showing the amount received, date received, how those grants were spent, the results of the project(s) funded, your organization's evaluation of the success of the project, and an affidavit from an officer or director certifying the nature and appropriateness of the expenditures.

Please return completed application and requested documentation to:

Allen P. Dodd, III
Elizabeth Dodd Lococo
William E. Barth Foundation
12004 LaGrange Road
Louisville, Kentucky 40223

If you have any questions please call Allen P. Dodd, III or Elizabeth Dodd Lococo at (502) 584-1108 or by fax (502) 587-7756. Additional applications may be found on the Web at <http://www.doddattorneys.net>