

# Kappa Kappa Gamma Charitable Foundation of Houston 2018 Grant Summary and Guidelines

**NOTE:** Our organization conducts its fundraising efforts over a two-year cycle, with grants awarded in the year following the end of the two-year cycle. Our current fundraising will span May 2019-April 2021. Grant applications will be accepted beginning approximately in June 2020 with a deadline for submission of August 15, 2020. The Foundation will notify the applying agencies early in 2021 of its decisions regarding each application. The actual funding of grants will occur in the spring of 2021.

Below is our grant application for the period May 2017-April 2019, which may be used for information purposes.

## **Mission Statement**

The primary purpose of the Kappa Kappa Gamma Charitable Foundation of Houston is to attract and generate financial support for distribution to charitable organizations which meet the established philanthropic guidelines.

## **History**

The Kappa Kappa Gamma Charitable Foundation of Houston (“the Foundation”) was established in 1980 by the leadership of the Kappa Kappa Gamma Alumnae Association of Houston. The purpose of the Foundation is to encourage and support the efforts of charitable organizations and programs for the betterment of the community. Since inception, the Foundation has distributed more than \$3,800,000 to the community.

## **Area of Current Interest**

The interest of the Foundation is rehabilitation. The basic philosophy of the Foundation has been to assist the disabled toward a fuller life and to help those with disabilities live up to their capabilities. Our interpretation of disabilities includes individuals who are physically handicapped, mentally challenged, socially disadvantaged, emotionally disturbed and the aged.

## **Grant Request Guidelines and Criteria**

1. The requesting organization must be tax exempt pursuant to IRS Section 501 (c)(3) or 170 (b) (1) (A) (v) or 170 (c) (1).
2. Request must be in writing with all required documentation as detailed on page 3.
3. The Foundation supports requests for specific purposes rather than for a general building fund or operating expenses and will not consider requests for reimbursement of funds already spent.
4. Project requests will be considered in two monetary levels:
  - \* \$ 1,000 up to \$10,000
  - \* \$10,000 and above
5. A maximum of two project requests may be submitted by an organization.
6. Funds are to be spent and accounted for within one year after receipt.

## **General Exclusions**

The Foundation **does not** support:

- Grants to religious organizations for religious purposes
- Testimonial dinners, fundraising events or advertising
- Grants to cover past operating deficits or debt retirement

- Grants for operating budget items (including salaries) and endowments
- Grants for capital campaigns
- Grants to support individuals
- Grants for commitments extending into successive years
- Grants (direct or indirect) to support candidates for political office or influence any legislation

Except for isolated incidents involving special circumstances, the Foundation confines its grants to organizations situated or having significant presence in the Houston Metropolitan Area.

### **Award of Funds**

The Foundation will notify the applying agencies early in 2019 of its decisions regarding each application. The actual funding of grants will occur in the spring of 2019.

**The Board of Trustees has the responsibility for final approval of each grant. The Foundation receives funding requests in excess of funds available for grants. A decision not to fund a proposal does not necessarily reflect on the merits of the applicant or the value of its proposal, but rather results from limited resources.**

**Before submitting a Grant Application, please review carefully the above stated Grant Request Guidelines and Criteria and General Exclusions to avoid applying if your project does not qualify.**

### **Please Submit Grant Requests to:**

Joan Stedman,  
KKGCFH - Philanthropy Chairman  
930 Briar Ridge Drive  
Houston, TX 77057

713-468-3005  
713-201-0717 (cell)  
[kappaphilanthropychair@gmail.com](mailto:kappaphilanthropychair@gmail.com)

**Grant Requests must be submitted by 5:00 p.m., Wednesday, August 15, 2018.**

**To complete your 2018-2019 Grant Application please make sure to include the following:**

*Twelve copies of the Grant Request Application;*

*Twelve copies of each Project Application (maximum of one in each monetary level: \$1,000-\$10,000 and \$10,000 or above);*

*One email of the information contained in Project Information above sent to [kappaphilanthropychair@gmail.com](mailto:kappaphilanthropychair@gmail.com);*

*A single envelope containing the items required as attachments – **see list below** - in the Grant Request Application along with any other collateral materials you deem necessary to help us understand your mission.*

**Submit package to:**

Joan Stedman,  
KKGCFH - Philanthropy Chairman  
930 Briar Ridge Drive  
Houston, TX 77057

713-468-3005  
713-201-0717 (cell)  
[kappaphilanthropychair@gmail.com](mailto:kappaphilanthropychair@gmail.com)

**Grant Requests must be submitted by 5:00 p.m., Wednesday, August 15, 2018.**

*In addition to the foregoing Grant Request Application, please provide **one** copy of the following in a separate envelope:*

- Current 501 (c)(3) or 170 (b) (1) (A) (v) or 170 (c) (1) IRS Determination Letter - legal advice
- Cover Letter signed by the Chair of the Board of Directors/Executive Director/Development Director
- One-page Fact Sheet describing history and scope of your organization
- List of current Board of Director and Officers, including business/community affiliations and phone numbers
- Website if available
- Two most recent fiscal years' operating budgets
- Two most recent years' financial statements
- Current annual report if available
- Articles of Incorporation and By-Laws
- Form 990 and link to web version
- Top 100 Donor List (specific amounts not necessary)
- Resume of person(s) responsible for overseeing this project

**Kappa Kappa Gamma  
Charitable Foundation of Houston  
2018 Grant Request Application**

1. Date of Application:
2. Name of organization:
3. Organization's mission statement:
4. Contact for grant application, including name, title, street address if different from mailing address, fax and email:
5. Annual organization budget for the current fiscal year:
6. Past two fiscal years' revenues, expenses and assets:
7. Percentage of budget used for fundraising expenses:
8. Number of paid employees and full-time equivalents:
9. Total salaries (including benefits) and percentage of budget:
10. Non-salary benefits afforded senior staff members:
11. Total number of persons served during a typical fiscal year:
12. Percentage of board members making a financial gift during the past fiscal year:
13. Percentage of average attendance of board members at official board meetings during past fiscal year:
14. Is your organization or any officer currently under review or investigation by a government or other regulatory agency? Please note that there is a continuing obligation to disclose this information.
15. Date of last grant request to this foundation:
16. Years and amounts of prior grants from this foundation:
17. How did your entity become aware of this opportunity? (Please feel free to ask Kappa's to submit letters of support to the Philanthropy Committee Chair prior to the August 15, 2018 deadline if appropriate – this is **NOT** a requirement)

**Kappa Kappa Gamma  
Charitable Foundation of Houston**

**2018 Project Information for Grant up to \$9,999**

1. Amount requested for this project:
2. Detailed description of proposed project, including goals and/or objectives:
3. What is the expected date for program implementation? (NOT sooner than the date when funds are awarded – expected April, 2019)
4. Projected timeframe of project:
5. Will this be a new project in 2019? If not, when was it initiated?
6. How many persons will be served through this project? Please describe the characteristics of the persons served, especially with regard to our focus on rehabilitation (see “Area of Current Interest” in our Grant Guidelines).
7. Will any fees be charged to beneficiaries of the project?
8. How is this project/program distinguished from others serving the same beneficiary population?
9. How is this program unique among others in the Houston area?
10. What is the evaluation process for this project within your organization?
11. What Measures/Outcomes will you use to assess results?
12. In light of the potential April, 2019 date for distribution of these funds, how will you initiate or sustain this project prior to the receipt of funds? (Please note #6 under Grant Guidelines.)
13. Please list other sources of income for this project:
14. Should the KKG Charitable Foundation of Houston consider a naming opportunity for this request? Is there a funding amount at which this opportunity is available?

**Kappa Kappa Gamma  
Charitable Foundation of Houston**

**2018 Project Information for Grant over \$10,000**

1. Amount requested for this project:
2. Detailed description of proposed project, including goals and/or objectives:
3. What is the expected date for program implementation? (NOT sooner than the date when funds are awarded – expected April, 2019)
4. Projected timeframe of project:
5. Will this be a new project in 2019? If not, when was it initiated?
6. How many persons will be served through this project? Please describe the characteristics of the persons served, especially with regard to our focus on rehabilitation (see “Area of Current Interest” in our Grant Guidelines).
7. Will any fees be charged to beneficiaries of the project?
8. How is this project/program distinguished from others serving the same beneficiary population?
9. How is this program unique among others in the Houston area?
10. What is the evaluation process for this project within your organization?
11. What Measures/Outcomes will you use to assess results?
12. In light of the potential April, 2019 date for distribution of these funds, how will you initiate or sustain this project prior to the receipt of funds? (Please note #6 under Grant Guidelines.)
13. Please list other sources of income for this project:
14. Should the KKG Charitable Foundation of Houston consider a naming opportunity for this request? Is there a funding amount at which this opportunity is available?