



City of Plano
2011 Consolidated Grant Process
Site Improvement/Equipment Acquisition Application Cover Sheet

SECTION I

Organization Name: _____

Address: _____

City: _____ State: _____ ZIP: _____ Phone: _____ Fax: _____

Director's Name/Title:

Director's Contact Information:

Name: _____ Phone: _____

Title: _____ Email: _____

SECTION II

Name of Program/Project: _____

Location of Program/Project: _____

Total Grant Amount Requested: _____

Organization Tax I.D. #: _____ DUNS #: _____

Contact Person Concerning Grant Application: _____

Contact Person's: Phone: _____ Email: _____

SECTION III

Authorized Official's Name/Signature/Date:

Printed Name: _____

Signature: _____ Date: _____

SECTION IV

Did a representative of your organization attend one of the 2010 City of Plano training sessions for consolidated grant applications:

Yes, on date: _____ No

SECTION V (CITY STAFF ONLY)

Received by: _____ Date/Time: _____

SECTION VI

Application Checklist - Check the following boxes to indicate each item is included in the application packet.

	One original paper copy of grant application with signed coversheet and all attachments
	One CD-ROM, flash drive or similar device with copies of all documents, including application and all attachments, in PDF format.
	Attachment 1: Detailed annual organization budget for the current fiscal year
	Attachment 2: List of organization's officers/board members including the city in which they live, their professional affiliations, and their ethnicity.
	Attachment 3: Annual meeting schedule for organization's officers/board members
	Attachment 4: Resumes of Organization and Program Directors
	Attachment 5: Copy of the organization's latest tax return accepted by IRS
	Attachment 6: Copy of the organization's IRS letter of determination
	Attachment 7: Copy of the organization's most recent audit of financial records OR
	The organization does not have an audit but has included the required financial information described in the instructions as an attachment in place of the audit.
	Attachment 8: Copy of the organization's most recent audit recommendations letter/management letter submitted to the board of directors OR
	The organization does not have a management letter or the like but has included a letter stating such and completed the appropriate information in the audit certification form.
	Attachment 9: Audit information certification form
	Attachment 10: Copies of required bids.

Commissioner's Notes

**2011 City of Plano Consolidated Grant Process
Site Improvement/Equipment Acquisition Application**

Definition of Grant Type – The Site Improvement/Equipment Acquisition Application focuses on two primary areas. They are (1) the funding of repairs, refurbishment, or improvements to an organization’s facility at which services are provided to Plano residents and (2) the acquisition of equipment (exceeding \$1,000) to be used in performing services for Plano residents including administrative function. Portions of the request may include payroll or administrative expenses (e.g. bid preparations, construction drawings) relating to the proposed project or acquisition. Three bids will be required to be obtained by organizations seeking funding through this grant type, two of which must be included with this application. The third bid must be submitted to city staff no later than one week prior to your organization’s public hearing before the Community Relations Commission. This application form should not be used for acquisition of equipment that is estimated to cost less than \$1,000.

Section 1. Organization Overview

A. What is your organization’s mission or purpose?

B. List all of your organizations programs offered locally to clients.

C. Provide a one sentence explanation of Programs listed in Section 1B, and the core services offered through each of the programs.

Commissioner’s Notes

Section 2. Site Improvement/Equipment Acquisition Description

A. Describe the site improvement project and/or major equipment acquisition program for which your organization is requesting funds. For Site Improvement only: Include the location of the site.

B. What percent of clients served by this equipment or at this location live within the city of Plano?

Commissioner's Notes

Section 3. Site Improvement/Equipment Acquisition Financial Information

This section requires financial information relating to the specific program for which funding is requested rather than financial information for the entire organization.

A. Provide a projected **Budget Summary** for the site improvement/equipment acquisition for which funding is requested.

Site Improvement/Equipment Acquisition Revenues	Amount	Site Improvement/Equipment Acquisition Expenses	Amount
Grants		Personnel	
Donations		Equipment Total	
Fundraisers		Site Improvement Total	
Other Revenues		Other Expenses	
<i>Total before City Funding</i>			
City Funding			
<i>Total Revenues for Improvement/Equipment</i>		<i>Total Expenses for Improvement/Equipment</i>	

B. Below list each of the “grants”, and the amounts requested/received, identified in the “revenues” line of the Budget Summary above. Updates are required during public hearing.

Funding Source	Amount Requested	Date Grant Submitted	Current Grant Status (pending/received/denied)		

C. List all resources included in “other revenues” in the Budget Summary above.

D. List each line-item expense in the category of “other expenses” in the Budget Summary above.

Commissioner’s Notes

E. Provide information using the following table only if requesting funds for site improvements:

Projected Sources/Use of Additional Funds

Additional Committed Sources of Funding	Amount	Projected Use of Funds	Estimated Timeline for Use of Funds

Section 4. Primary Programs Benefiting from Site Improvement/Equipment Acquisition

A. Name the primary program(s) from Section 1.B. that will benefit from the site improvement/equipment acquisition grant for which your organization is requesting funds.

B. Describe how the specific site improvement or equipment acquisition will enhance the program(s) referred to in A. above.

C. If your organization collects income verification, provide the specific percentage of low-to-moderate income clientele to be served by the program for which funding is requested (per application instruction) as well as a brief description of the documentation maintained to verify clientele income status.

D. If your organization *does not* collect income verification data, provide the estimated percentage of low-to-moderate income clientele to be served by the program for which funding is requested (per application instructions) as well as a brief description of the process by which the estimation is determined.

Commissioner’s Notes

E. If your organization collects clientele fees, does your program subsidize low-to-moderate income clients receiving services? How and in what proportion relating to the total clientele served?

F. Is this program unduplicated within the city of Plano? Answer “yes” if either the service or target population is unique and explain how it is unique.

Section 5. Organization Stewardship

This section requires financial information relating to the entire organization, including but not limited to the specific program for which funding is requested.

A. What is your organization’s fiscal year?

B. Organization Budget-to-Actual Summary (must reflect your most current, adopted budget projection and the two previous fiscal years)

Organization Revenues	Two Years Prior (Actual)	Previous Fiscal Year	Current Fiscal Year
Clientele Fees			
Federal Grants			
City of Plano Grants			
All Other Grants			
Donations			
Fundraisers			
Miscellaneous			
<i>Revenue Total</i>			
Organization Expenses	Two Years Prior (Actual)	Previous Fiscal Year	Current Fiscal Year
Personnel			
Operational			
Occupancy			
Other Expenses			
<i>Expense Total</i>			

C. What fiscal year is represented with the organization’s audit included as an attachment with this grant application?

Section 6. Grant Funding Requirements

- A.** List which 2010-14 City of Plano Consolidated Plan goal(s) your organization's grant request will address and describe how:
- B.** Indicate which one of the following outcomes your organization's grant will produce:
- Availability/Accessibility - Activities that make services, infrastructure, housing, and shelter available and accessible. Note that accessibility does not refer only to physical barriers.
 - Affordability - Activities that provide affordability in a variety of ways. This can include the creation or maintenance of affordable housing, basic infrastructure hookups, or services such as transportation or day care.
 - Sustainability - Activities that promote livable or viable communities and neighborhoods by providing services or by removing slums or blighted areas.
- C.** If your organization is requesting \$200,000 or more for construction, please describe how it intends to meet Section 3 federal requirements. Even if you are not requesting \$200,000, how does your organization encourage employment opportunities to low-income persons or business owners employing low income persons?
- D.** If your organization is requesting funding for 12 or more residential units (rehabilitation or new construction) or non-residential construction of \$2,000 or more, please describe how it intends to meet Davis Bacon federal requirements.

Section 7. Supporting Information

A. Describe the outreach process and accessibility of your organization to targeted Plano clientele.

B. Describe how your organization utilizes volunteers for this program.

C. Describe how your organization utilizes its board of directors to enhance the impact of this program.

D. Describe in detail your organization's effort and successes in securing donated labor, materials, and/or equipment to optimize funds provided for the proposed site improvement/equipment acquisition for which funds are requested. If your organization has not made a good faith effort to acquire donated labor, materials, and/or equipment for which this application is submitted, explain why.

E. If the funds your organization is requesting will not be spent equally across the grant's fiscal year, describe the anticipated schedule for, and the events that may trigger the disbursement of funds.

Commissioner's Notes

Commission Summary (Completed Only by Commissioners)

Agency: _____ Amount Requested: _____

Section 1. Organization Overview

How does the organization's mission/purpose and the clientele it serves meet the City of Plano's Consolidation Plan and the City of Plano's definition of emergency services?

Section 2. & 3. Site Improvement/Equipment Acquisition Description & Financial Information

Considering the description and financial information relating to this project, how well did the organization demonstrate an understanding and ability to manage city funding for this project?

Section 4. Primary Programs Benefiting from Site Improvement/Equipment Acquisition

How well does the primary program(s) that will benefit from the proposed site improvement/equipment acquisition meet the needs of the Plano community, and how significantly is the program(s) expected to benefit from the proposed site improvement/equipment acquisition?

Section 5. Organization Stewardship

Based on information from the Staff Evaluation Form, how effectively has this organization used past city funding?

How strong of a fiscal responsibility does this organization demonstrate in securing revenues from diverse sources?

Commissioner's Notes

Section 6. Grant Funding Requirements

Based on the HUD guidelines required for CDBG/HOME recipients undertaking site improvement/rehabilitation projects, does the organization demonstrate an overall understanding relating to this federal funding?

Section 7. Supporting Information

Did the organization make a solid effort to secure the needed materials, equipment and if applicable, labor on a donated basis?

Commissioner's Overall Impression

Taking into consideration the organization's overall presentation of written and oral information, does it deserve more than, equal to, or less than the average amount of all grants from the available sources?

Commissioner's Notes