



City of Plano Consolidated Grant Process 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 Information: Phone: _____ Email: _____

SECTION III

Authorized Official's Name/Signature/Date: _____

Printed Name: _____

Signature: _____ Date: _____

SECTION IV

One copy of Grant Application and Attachments	CD-ROM with copies of all documents
<u>Organization's Attachment Check List</u>	
1. Detailed Annual Organization Budget for Current Fiscal Year	2. List of Organization's Officers/Board Members & Annual Meeting Schedule
3. Resume of Director	4. A copy of Organization's latest Tax Return accepted by IRS
5. Copy of Organization's Certificate of Good Standing from State Comptroller's Office	6. Copy of Organization's most recent audit of Financial Records
7. Organization's Audit Information Form	8. Bids for Construction or Equipment (Two of Three required with application)

SECTION V

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 VI (CITY STAFF ONLY)

Received by: _____ Date/Time: _____

**2010 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. Provide a general description of the clientele your organization serves.

C. Provide the date of the first Board of Director’s meeting of the agency’s local organization.

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.

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		Site Improvement/Equipment Acquisition Expenses	
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. List each of the “grants” and the amounts requested/received identified in the “revenues” line above for 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” and all expenditures, by line item, included as a non-direct or direct “miscellaneous” expense in the Program Budget Summary above.

D. List each line-item expense in the category of “other expenses” relating to the site improvement/equipment acquisition project for which funds are requested.

Commissioner’s Notes:

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

- A.** Briefly describe the primary program(s) that will benefit from the site improvement/equipment acquisition grant for which your organization is requesting funds. The term “program” includes activities and/or services.
- 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.
- 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.** Are the program(s) that will benefit from this site improvement/equipment acquisition grant unduplicated within the City of Plano? State “yes” if either the service or target population is unique.

Commissioner’s Notes:

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 Summary (must reflect two previous fiscal years and projected budget for current fiscal year)

Organization Revenues	Organization FY 2008	Organization FY 2009	Organization FY 2010 (Projected)
Clientele Fees			
City of Plano Grants (including BCSG, CDBG/HOME)			
Federal Grants (not including CDBG/HOME)			
All Other Grants			
Donations			
Fundraisers			
Miscellaneous Revenue			
<i>Revenue Total</i>			
Organization Expenses	Organization FY 2008	Organization FY 2009	Organization FY 2010 (Projected)
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? (If your organization has an audit, you must submit it.)

D. If no audit has been prepared, attach a complete, unaudited financial report reflecting your organization’s most recently completed fiscal year including a profit/loss statement and balance sheet. If your organization is not capable of providing an unaudited financial report, provide a description of your organization’s methodology to record/track revenues and expenditures as well as the organization’s most recently filed 990 or 990-PF tax form. See application instructions for further details.

Commissioner’s Notes:

Section 6. CDBG/HOME Funding Information

Answer the following only if requesting CDBG/HOME funds:

- A. If receiving CDBG/HOME funds, indicate which one of the following HUD objectives the grant request will address:
 Suitable Living Environment - Activities that benefit communities, families, or individuals by addressing issues in their living environment.
 Decent Affordable Housing - Housing activities that meet individual, family, or community needs.
- B. If receiving CDBG/HOME funds, indicate which one of the following outcome the 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 producing services or by removing slums or blighted areas.

C. 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

D. If your organization is requesting \$200,000 or more for construction, please describe how it intends to meet Section 3 federal requirements. (See instructions for more information about Section 3 requirements.)

Commissioner’s Notes:

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?

Section 6. CDBG/HOME Funding Information

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?