

The Foundation Roundtable: Common Grant Application

Cover Sheet

Foundation you are applying to: _____
Legal Name of Applicant Organization: _____
Project Name (if applicable): _____
Funds will pay for: _____
Full Mailing Address: _____
Location(s) if different from above: _____
Executive Director: _____
Phone: _____ Fax: _____
Email: _____ Website: _____
Contact Person & Title: _____ Phone: _____

Tax-exempt Status:(Most foundations require 501(c)(3) status. You must check this requirement before applying.)

501(c)(3) Granted Tax I.D. Number: _____ Other: _____

Type of Request: *Check with individual foundations to determine the types of accepted grant requests.*

General Support Program Support Seed Funding Research

Capital Endowment Multi-Year Other: _____

This Grant Request: \$ _____ Total Project Budget: \$ _____

Grant Period from: _____ To: _____

Total Organizational Budget for Current Year: \$ _____ Fiscal year begins: _____

Summarize the organization's mission statement (two to three sentences):

Summarize your grant request (two to three sentences):

Proposal Authorization

We certify that the information in this application is to the best of our knowledge true and accurate and is submitted with our Board of Directors'/Governing Body's full knowledge and endorsement:

Name & Title of Authorized Board/Governing Body Representative Signature Date

Name & Title of Authorized Board/Governing Body Representative Signature Date

The Foundation Roundtable: Common Grant Application

Proposal Narrative

Directions: Limit your Proposal Narrative to **four (4) pages maximum, with .8 inch margins, 12 point font or larger**. Fill in each section using the specific questions below as boldface headings with your responses in normal text.

Background (One page or less)

1. Your organization's history and accomplishments.
2. Your current programs and activities. Include the constituency you serve, with specific demographic information. How are they actively involved in your organization and/or how do they benefit from your organization's work?
3. Your organization's relationships – both formal and informal – with other organizations working to meet the same need. In what way does your work differ from that of other organizations?

Funding Request

1. What need or problem does your project work to address?
2. In a short paragraph, tell us your project's (or organization's) goals and the specific outcomes you project for the grant period (i.e. numbers served, behavior or attitudes changed, capital project completed, etc.).
3. Describe your project or the capital items requested, including:
 - Whether the project is new, ongoing or an expansion
 - Target audience, including specific demographic information
 - Activities/strategies that will be used to meet your stated outcomes
 - General timeline for the main objectives of your project
4. If this is a request for General Support, what are your organization's most pressing needs?
5. How do you plan to evaluate the effectiveness or impact of the project?
6. Summarize the skills and relevant experience of key staff/volunteers essential to the project's success. If other organizations are collaborating on this project, note which ones and in what ways.
7. If full funding is not available, what is the contingency plan for securing additional support and/or how can you modify your proposal?

The Foundation Roundtable: Common Grant Application

Project Budget

Note: Check with each foundation to see if this form is required.

Organization Name: _____

Name of Project (if different): _____

Budget dates for grant period: _____

INCOME

Possible categories: Government grants, foundation grants, individuals, business support, events, fees for service, etc.

Source	Total Project (\$)	Pending (\$)	Secured (\$)	Notes
TOTAL INCOME				

List the In-Kind (non-cash) contributions: _____

EXPENSES

Possible categories: Salaries, professional fees, rent and utilities, travel, publicity/outreach, events, capital items, etc.

Item	Total Project (\$)	This Request (\$)	Notes
TOTAL EXPENSES			

The Foundation Roundtable: Common Grant Application

Organization Financial Summary

Note: Check with each foundation to see if this form is required.

Organization Name: _____ Fiscal Year Dates: _____

INCOME

Possible categories: Government grants, foundation grants, individuals, business support, events, fees for service, etc.

Source	Prior Year's Actual	Projected Annual Budget (\$)	YTD Actual (\$) as of [/ /]
TOTAL INCOME			

List the In-Kind (non-cash) contributions: _____

EXPENSES

Possible categories: Salaries, professional fees, rent and utilities, travel, publicity/outreach, events, etc.

Item	Prior Year's Actual	Annual Budget (\$)	YTD Actual (\$) as of [/ /]
TOTAL EXPENSE			
NET PROFIT OR LOSS			

Total Capital Expenses			
------------------------	--	--	--

i.e., computers, vehicles, building improvements, etc.:

Notes:

Background

1. Your organization's history and accomplishments.

The St. Cecilia Fund, a secular volunteer organization, is the oldest charity in Santa Barbara. It was founded in 1891 by women, all of whom were musicians, hence the name St. Cecilia, the patron saint of music. Since its beginning, the St. Cecilia Fund has raised funds to assist low-income Santa Barbara County residents pay for critical dental or medical care that they cannot afford.

In its early years, the Fund supported the patients of Cottage Hospital, but quickly branched out to help those unable to pay a medical expense from any provider. From its inception, it has been an all-volunteer agency comprised of an all-female working board of directors and member donors who make financial contributions. We have no paid staff. Our expenses in 2012 were less than 0.5% of our budget. Our funds come from memberships, other donations, memorials, bequests, and occasional grants.

In 2012 the board conducted a strategic planning process and identified the need to appeal to a broader donor base in order to increase both the number of member donors and the amount of each donation. Towards that end, the name of the organization was changed slightly from St. Cecilia Society to St. Cecilia Fund. This was the third slight name change in the organization's 122-year history.

St. Cecilia Fund continues to be one of the very few organizations in the county to assist low-income and indigent people who have no place else to turn when they cannot pay a critical medical or dental bill. We pride ourselves on having reliable relationships with both referring agencies and health care providers. We are able to provide quick decisions regarding the cases that are referred to us and in almost all instances are able to negotiate sizable discounts on the services rendered.

2. Your current programs and activities. Include the constituency you serve, with specific demographic information. How are they actively involved in your organization and/or how do they benefit from your organization's work?

Our only program and purpose is to provide financial assistance to low-income residents of Santa Barbara County in paying a medical or dental bill. The population we serve is the working poor, the unemployed, low-income seniors, and mentally and physically challenged individuals. Our population either has no insurance or is under-insured. The vast majority of requests come from South Santa Barbara County (82% in 2012).

3. Your organization's relationships – both formal and informal – with other organizations working to meet the same need. In what way does your work differ from that of other organizations?

Requests for financial assistance come to us from social workers, healthcare providers, and dental and medical professionals throughout Santa Barbara County. We receive requests from Parish Nursing, Catholic Charities, the Cancer Center of SB, St. Vincent's, SB Neighborhood Clinics, St. Joseph's Parish Carpinteria, Villa Caridad Senior and Family Housing, Independent Living Resource Center, VNA/Hospice, St. Vincent de Paul Society, Guadalupe Free Clinic and Marian Medical Center among others.

The St. Cecilia Fund is the only all-volunteer organization in Santa Barbara County that accepts requests from multiple sources and pays for care given by different healthcare providers; and one of a very few that pays for dental work for adults or children who do not qualify for Medi-Cal. A few medical facilities provide charity care for low-income patients but those programs are sometimes inadequate or unavailable to patients so we receive requests on behalf of individuals who truly have no ability to pay for the medical care they need at these facilities.

Funding Request

1. What need or problem does your project work to address?

There are a growing number of low-income and indigent people in Santa Barbara who cannot afford to pay for critical medical care or dental procedures. These people often need a diagnosis; dental care for infections before they can receive chemotherapy; assistance with a hospital co-pay so they can return to the hospital for further care; and a whole list of other situations that are either not covered by insurance or Medicare or Medi-Cal and for which they have no ability to pay. This is the need that the St. Cecilia Fund is addressing in our community.

2. In a short paragraph, tell us your project's (or organization's) goals and the specific outcomes you project for the grant period (i.e. numbers served, behavior or attitudes changed, capital project completed, etc.).

Our goal is to fully fund every request that meets our criteria of demonstrated need so that each individual we help is able to receive the medical or dental care they require. We review cases as they are referred to us and have no set number of people we will help; we are curtailed only by the funds we have available.

3. Describe your project or the capital items requested, including:

- **Whether the project is new, ongoing or an expansion**
- **Target audience, including specific demographic information**
- **Activities/strategies that will be used to meet your stated outcomes**
- **General timeline for the main objectives of your project**

This request is for assistance with our ongoing effort to provide funds to pay medical or dental bills on behalf of low-income residents who have no place else to turn in time of great need. Our target demographic is low-income and indigent residents of Santa Barbara County, with the vast majority residing in south county. Our experience has been that this population has needed more medical and dental care and has fewer places to turn for assistance in paying for that care. In recent years, we have experienced a significant increase in requests for assistance due to economic conditions, lack of adequate insurance coverage and Medi-Cal cutbacks. In 2009, Medi-Cal eliminated most adult dental services, which has led to a significant increase in requests for dental care. From 2011 to 2012, we experienced a 60% increase in the number of cases referred to us. We anticipate this trajectory continuing, resulting in an even larger number of requests during the grant period.

In an effort to increase donations we have added new and younger board members and are in the process of updating our printed materials, website and creating a newsletter. Unfortunately, we do not

anticipate that our donations and other income will keep pace at this time with the increased level of requests.

We follow a uniform procedure for each case under consideration. Our volunteer case investigator, a Board Member, does a thorough investigation of each request to determine the exact needs of the patient and to ensure that the patient truly does not have the ability to pay for the care being sought. She explains to the Board the story behind the person in need -- what has happened to bring him or her to this point, what care is being sought, why it is critical, and the patient's income and expenses. On every case we negotiate a lower fee for service and are successful 95% of the time.

With dental requests, we have established a relationship with the Eastside Dental Clinic and they provide dental evaluations for our referred patients at a lower fee. Dental cases are typically not for routine care, but for problems that could lead to more serious health conditions or a diminished quality of life. Many are for dental care that is mandatory before beginning chemotherapy or undergoing joint or organ replacement.

Funds are never paid directly to the client, but to the provider on behalf of the client. Prior to paying a bill, we always try to negotiate a discount and typically obtain discounts of 15% to 50%, and sometimes as high as 80% -- thereby significantly stretching our funds. In the next year, we will continue our effort to increase the number of dentists and doctors who will provide assistance at a reduced rate.

The focus of this grant is our ongoing program of helping those in need. Our timeline is continuous as we do what we have done, year after year, for 122 years.

4. If this is a request for General Support, what are your organization's most pressing needs?

Every request we receive is a pressing need, and we simply do not have adequate funding to grant all the requests. It is sometimes difficult to imagine the situation of the people we help, the most vulnerable segment of our community, whose access to healthcare has been compromised by their limited income. Many have been working their whole life to make ends meet and then disease or an accident strikes. They are the sole support for a family, the caretaker of a handicapped family member, the laborer who works seasonal jobs to put food on our tables, or the senior citizen living on a modest income with Medicare but without supplemental insurance. They are people diagnosed with an illness who cannot receive additional necessary treatment because they have an unpaid bill. The stories are unique, but most are nothing short of heartbreaking.

5. How do you plan to evaluate the effectiveness or impact of the project?

We know from our case investigator's reports the critical nature of the requests we receive. By granting the requests, we know we are meeting these critical needs. Many times we hear back from

the referring agency of how our assistance has impacted a family or individual and how grateful they are for the help they received from us.

6. Summarize the skills and relevant experience of key staff/volunteers essential to the project's success. If other organizations are collaborating on this project, note which ones and in what ways.

Tish Gainey, President: long-time resident and former project director and editor for a company producing educational materials and children's television programming. Over 30 years on nonprofit, public and business sector boards; extensive background in board development, long-range planning and fund development.

Nikki Rickard, Case Investigator: 40 years as a volunteer and board member for nonprofits.

Mary Garton, Treasurer: 30 years at Barclays Bank in New York and England; volunteer and board member of several Santa Barbara nonprofits.

Sallie Coughlin, Finance Chair. 12 years as vice-president of marketing at Interpublic Advertising; 10 years as a partner in an equity trading firm. For the past 10 years, involved with several Santa Barbara nonprofits.

Sigrid Toye, Secretary: 32 years as an educational and behavioral therapist, former trustee and board member at educational institutions and nonprofits in Los Angeles and Santa Barbara.

Susan Johnson, Membership/Marketing Chair: owner of Home Instead Senior Care; Member, Financial Abuse Specialist Team of Santa Barbara County and the Elder Abuse Prevention Council of Santa Barbara County; 10 years practicing law at Mutual of Omaha; former Adjunct Professor, Creighton University.

Victoria Bessinger, Member-at-Large, Retired pathologist and former Medical Director of the hospital laboratories at Rutland Regional Medical Center in Vermont.

7. If full funding is not available, what is the contingency plan for securing additional support and/or how can you modify your proposal?

If full funding is not available, we will help those whom we can with the income we receive, but we will not be able to fund all the eligible requests that are submitted to us.

In January of each year we hold our Annual Meeting/Tea, which is underwritten by our board members. Members renew their dues at this time and are encouraged to bring friends to the Tea to learn more about the St. Cecilia Fund. As a bare-bones organization, efforts are focused on case investigation, not fundraising, and our members and donors appreciate the efficiency of our operation. We will, however, continue to try to broaden our donor base and seek other grant funding.

St. Cecelia Organization Balance Sheet Summary

ASSESTS	MOST CURRENT AS OF 2.28.13	2012 prior year close
cash and equivalent	327629	325106
equipment	1583	1583
TOTAL ASSETS	329212	326689
Accounts Payable	132455	98316
Total liabilities	132455	98316
net assets	196757	228373
Total liabilities and net assets	329212	326689



Department of the Treasury
Internal Revenue Service

PHILADELPHIA, PA 19255

In reply refer to: 2820605197
Oct. 23, 1992 LTR 147C
95-6047722 0000 00 000

02856

ST CECILIA SOCIETY
ATTN: LORAIN EALAND ASST TREAS
1390 SANTA CLARA WAY
SANTA BARBARA CA 93108-2524

Taxpayer Identification Number: 95-6047722

Dear Ms. Ealand:

Thank you for the inquiry dated Sep. 10, 1992.

The St. Cecelia Society (E.I.N. 95-6047722) is a tax-exempt organization under Section 501 (c) (3). This account was established with I.R.S. in June, 1968.

When you write, please include your telephone number, the hours you can be reached, and a copy of this letter. You may also want to keep a copy of this letter for your records.

Telephone Number () _____ Hours _____

We apologize for any inconvenience we may have caused you, and thank you for your cooperation.

Sincerely yours,

JOHN C. BRENNAN
CHIEF, ACCOUNTING BRANCH

Enclosure(s):
Copy of this letter