



## 2018/2019 Funding Guidelines

### **MISSION**

Established in 1986, Thunderbirds Charities is the charitable arm of The Thunderbirds, whose purpose is to grant the funds generated by the Waste Management Phoenix Open. Thirty-three years later, the mission of Thunderbirds Charities remains the same; to assist children and families, help people in need and improve the quality of life in Arizona communities. Each year Thunderbirds Charities accepts grant proposals that support at-risk youth & families, community outreach/quality of life, education, improving the lives of the physically and mentally challenged and working to eliminate domestic violence, homelessness, and poverty.

### **GEOGRAPHIC PRIORITIES**

Thunderbirds Charities only accepts requests from organizations serving Maricopa County, unless the project/program primarily benefits Maricopa County residents.

### **FUNDING ELIGIBILITY & GUIDELINES:**

To be eligible, a charity must hold a 501 (c) (3) non-profit status and be based in Arizona. Thunderbirds Charities reserves the right to accept or reject any application and to approve or disapprove any proposal for funding. Thunderbirds Charities also reserves the right to change the application criteria at any time. Please refer to the list below for more detailed information. Other guidelines may apply and will be evaluated on an individual basis. Our grant amounts vary, depending on revenues from the Waste Management Phoenix Open.

Thunderbirds Charities does not currently provide funding to any of the following organizations or activities:

- Nonprofit organizations whose 501 (c) (3) status has been in effect for less than three years.
- Organizations that discriminate on the basis of race, color, gender, national origin, marital status, age, disability or veteran status.
- Individuals.
- Political, labor or fraternal organizations.
- Advocacy or lobbying activities for issue related topics.
- Medical or scientific research.
- Religious organizations, churches or programs that are purely denominational in purpose.
- Foundations or organizations which are themselves, grant-making entities.

- Endowments, Fellowships or Scholarships (for college purposes).
- Individual schools and their support organizations (including Booster Clubs, PTA/PTO's, athletic teams, bands, performing arts groups, alumni associations reunions or school foundations).
- Debt reduction campaigns.
- Ongoing support or multi-year support.
- Projects or programs outside of Maricopa County, unless the project/program primarily serves Maricopa County residents.

Before submitting a proposal:

Step 1: Read the Grant Guidelines and Frequently Asked Questions.

Step 2: All proposals must be submitted through the Thunderbirds Charities website ([www.thunderbirdcharities.org](http://www.thunderbirdcharities.org)).

Step 3: Submit a proposal narrative (please do not use bullet points). Requirements include, but are not limited to:

- A. The purpose of the request [maximum word count – 100].
- B. A narrative overview of the organization [maximum word count – 225]. Be sure to include:
  1. History, mission, goals and the needs or problems that you work to address.
  2. A brief description of current projects/programs, activities, and accomplishments. Please include the geographic area, target population, and the number of individuals served.
- C. A description of the project for which funding is being sought [maximum word count – 500]. Please include:
  1. A brief description of the specific problem, need or opportunity in our community.
  2. The population and geographic area you plan to engage and how they will benefit from the project, including the number of individuals that will be served.
  3. A summary of the activities or strategies that will be employed to implement the project.
  4. The anticipated timetable of the program, and how the effectiveness will be measured or evaluated.
  5. An outline of how the project will be sustained going forward.

Step 4: Required supplemental materials include, but are not limited to:

- A. The organization's IRS 501(c) (3) tax-exempt determination letter. Using a 'second party' 501(c) (3) status is not permitted.
- B. The organization's IRS Form 990 or 990-EZ for the most recently completed fiscal year. IRS Form 990/990 EZ returns older than 15 months from the date of application will be rejected.
- C. Audited, reviewed, compiled or internally generated financial statements for the most recently completed fiscal year and the fiscal year immediately prior. Each financial

statement must include a balance sheet (or equivalent), income statement (or equivalent), cash flow statement, appropriate footnotes and accountant’s reports. Financial statements covering periods older than 15 months and 27 months, respectively, from the application date will be rejected.

- D. Annual operating budget for the current fiscal year with non-detailed, line items rolled up (example layout for operational budget below). If you are within 3 months of your fiscal year end, please use your projected budget as current year.
- E. Budget for the specific project/program for which you are requesting funding (example layout for program budget below). Please be sure to add a column that outlines where funding would be applied.
- F. A list of funds raised to date and from whom, for the specific program/project for which you are requesting funding (amounts of \$5,000 and above).
- G. A complete list of corporations and foundations that have given to the organization in the previous fiscal year (amounts of \$5,000 and above). Please be sure to include the dollar amount per donor.
- H. A list of the organization’s Board of Directors, including their primary business or professional affiliation.

**FUNDING CYCLE DEADLINES**

Application process opens	Application submission deadline	Thunderbirds Charities notifies applicant regarding funding decisions
FALL FUNDING CYCLE		
August 1, 2018	September 1, 2018	Early December 2018
SPRING FUNDING CYCLE		
February 1, 2019	March 1, 2019	Late May 2019

Thunderbirds Charities accepts proposals on or before the due date, and appreciates those organizations that submit prior to the deadline.

All materials must be received online no later than 5:00 p.m. MST the day of the deadline.

If you have questions, please contact Cheryl Ruggiero at 602-216-7325 or [cruggiero@wmphoenixopen.com](mailto:cruggiero@wmphoenixopen.com).

## Instructions – Organizational Budget Example

Please follow the budget example when submitting your organization’s overall budget for the current fiscal year. If you are within 3 months of your fiscal year end, please use your projected budget as current year.

**Applicants should add or modify the individual line items to match their budget categories.**

**THIS IS NOT MEANT AS A FILLABLE FORM!**

**Total Organizational Budget:** List organization’s budget, including both income and expense line items for the current fiscal year.

**Previous Fiscal Year Budget:** List organization’s budget for the previous fiscal year.

**Previous Fiscal Year Actual:** List organization’s actual totals for the previous fiscal year.

**Budget Narrative:** Clearly explain what is specifically included in any budget revenue or expense line items that are not self-explanatory. For example: Personnel line item includes Program Coordinator, Program Assistant, Volunteer Coordinator and 12 other FTE.

<b>EXAMPLE LAYOUT FOR ORGANIZATIONAL BUDGET FORMAT</b>				
<b>KEEP TO ONE PAGE IF POSSIBLE</b>				
<b>THIS IS NOT INTENDED TO BE A FILLABLE FORM</b>				
<b>Organization Name</b>	Organization Name			
<b>Fiscal Year</b>	Fiscal Year in which the grant will be used (mm/dd/yy - mm/dd/yy)			
<b>Previous Fiscal Year</b>	Previous Fiscal Year (mm/dd/yy - mm/dd/yy)			
<b>PLEASE MODIFY CATEGORY TITLES AS NEEDED.</b>	<b>Total Organization Budget</b>	<b>Previous Fiscal Year Budget</b>	<b>Previous Fiscal Year Actual</b>	<b>% Change Previous Budget/Actual</b>
Income Sources				
Foundation and Corporate Grants				
Government Grants and Contracts				
Individual Contributions				
Earned Income				
In-Kind Income				
Investments				
Other Income ( <i>please explain</i> )				
Total Income				

Expenses				
Salaries and Wages ( <i>please indicate FTE</i> )				
Employee Benefits and Taxes				
Total Personnel Costs				
Consultants				
Depreciation				
Equipment				
Fundraising/Development				
Insurance Expense				
Marketing/Advertising				
Postage and Delivery				
Printing				
Professional Development				
Rent and Occupancy				
Supplies and Materials				
Telephone and Technology				
Travel				
Administrative				
Other Expense ( <i>please explain</i> )				
Miscellaneous				
Total Non Personnel Costs				
Total Expenses				
Excess of Revenue Over Expenses				

BUDGET NARRATIVE

## Instructions – Project/Program Budget Example Layout

To be considered for a grant, please follow the project/program budget format example. Applicants should add or modify the individual line items to match their budget categories.

**THIS IS NOT INTENDED AS A FILLABLE FORM.**

**Amount Requested:** Indicate how a Thunderbirds Charities grant will be allocated o the proposed project/program’s budget.

**Total Project/Program Budget:** List all income and expenses related to the project/program adding or modifying necessary individual line items to match your budget categories. The total organization budget should include the total project/program budget.

**Total Organizational Budget:** List organization’s budget, including both income and expense line items for the fiscal year in which the grant funds will be used. The total organization budget should include the total project/program budget.

**Projects/Programs Income Projections:** List confirmed, anticipated, submitted and prospect sources of income for the project/program, noting the amount in the appropriate column.

“Individual Contributions” can be listed as a general source, but other sources such as foundation grants, corporate contributions and government grants/contracts should be listed individually. Specify the name of each foundation, corporation or government entity with the amount of funding in the appropriate column.

<b>EXAMPLE FORMAT FOR PROJECT / PROGRAM BUDGET</b> <b>KEEP TO ONE PAGE IF POSSIBLE</b> <b>THIS IS NOT INTENDED AS A FILLABLE FORM</b>				
<b>Organization Name</b>	Organization Name			
<b>Project Title</b>	Project/Program Title			
<b>Fiscal Year</b>	Fiscal Year in which the grant will be used (mm/dd/yy - mm/dd/yy)			
<b>PLEASE MODIFY CATEGORY TITLES AS NEEDED.</b>	<b>Total Project/Program Budget</b>	<b>Thunderbirds Charities Request Amount</b>	<b>Total Organization Budget</b>	
Income Sources				
Foundation and Corporate Grants				

Government Grants and Contracts				
Individual Contributions				
Earned Income				
In-Kind Income				
Investment				
Other Income (please explain)				
Total Income				
Expenses				
Salaries and Wages ( <i>please indicate FTE</i> )				
Employee Benefits and Taxes				
Total Personnel Costs				
Consultants				
Depreciation				
Equipment				
Fundraising/Development				
Insurance Expense				
Marketing/Advertising				
Postage and Delivery				
Printing				
Professional Development				
Rent and Occupancy				
Supplies and Materials				
Telephone and Technology				
Travel				
Administrative				
Other Expense ( <i>please explain</i> )				
Miscellaneous				
Total Non Personnel Costs				
Total Expenses				
Excess of Revenue Over Expenses				
<b>Income Projections</b>				
<i>Confirmed</i> = an income source that has already been secured.				
<i>Anticipated</i> = an income source for which a proposal has been submitted <b>and</b> the applicant has reasonable expectation of receiving funding.				
<i>Submitted</i> = an income source for which a proposal has already been submitted, but no feedback regarding a funding award has been received.				

*Prospect* = an income source that the applicant intends to solicit, but to which a request for funding has not yet been submitted.

*Individual Contributions' can be listed as a general source, but other sources such as foundation grants, corporate contributions and government grants/contracts should be listed individually. Specifying the name of each foundation, corporation or government entity with the amount of funding in the appropriate column.*

<b>Income Sources</b>	<b>Confirmed</b>	<b>Anticipated</b>	<b>Submitted</b>	<b>Prospect</b>
<b>Total Income</b>				

BUDGET NARRATIVE