

OTTO BREMER FOUNDATION Information for Applicants

FUNDING PROCESS/TIMELINE. The Foundation's review process begins once complete application materials are received. We acknowledge receipt of proposals within three business days and notify applicants immediately if a proposal is incomplete or falls outside our geographic or programmatic purview. Program officers review eligible proposals, request additional information if necessary, conduct site visits whenever possible, and make recommendations to the Trustees, who make final decisions at a bi-monthly meeting. To help in your planning, the following schedule notes the dates by which applicants can submit complete applications to ensure consideration at the next Foundation decision meeting. Applications that are not complete in time for consideration at the next upcoming Trustees' meeting will be considered at the following meeting if all materials are received.

Completed proposals must be received at the foundation by:	For consideration on:
Friday, October 23, 2009	January 28, 2010
Thursday, December 31, 2009	March 25, 2010
Friday, February 26, 2010	May 27, 2010
Friday, April 30, 2010	July 22, 2010
Friday, June 25, 2010	September 22, 2010
Friday, August 27, 2010	November 18, 2010
Friday, October 22, 2010	January 27, 2011

WHAT WE FUND. The Otto Bremer Foundation assists people in achieving full economic, civic, and social participation in and for the betterment of their communities. Our work to help build and maintain vibrant communities is based on the vision and legacy of our founder, Otto Bremer, whose commitment to the Bremer bank communities and to those working to make their lives better continues to guide the Foundation.

Grants and program-related investments respond to community needs by supporting programs, initiatives, and partnerships that address immediate concerns and/or long-term strategies. Grants support the following purposes: program or project development, general operations, organizational effectiveness, civic engagement, capital, challenge/matching grants, and program-related investments. Complete funding guidelines are available in our Annual Report or online at www.ottobremer.org.

Please note: As part of our ongoing response to the current economic challenges, the Otto Bremer Foundation is focusing Twin Cities funding on programs and initiatives to relieve poverty, including emergency assistance as well as longer-term poverty reduction. Otto Bremer Foundation funding in North Dakota, Wisconsin, and Minnesota communities outside the Twin Cities metro area will continue to respond to a broad range of proposals to meet community opportunities and needs, including needs related to poverty. For additional information, see www.ottobremer.org for Questions and Answers About Otto Bremer Foundation Twin Cities Funding. Any future changes in our Twin Cities or other funding will be announced on the website.

ELIGIBILITY. Grants and program-related investments are made to organizations whose beneficiaries are residents of Minnesota, North Dakota, or Wisconsin, with priority given to regions served by Bremer banks. (See our website for a list of Bremer communities.) Funding is restricted to private nonprofit or public tax-exempt organizations for purposes defined under section 501(c)(3) of the Internal Revenue Code.

CONTENT OF APPLICATIONS. Complete applications consist of three parts: Proposal Cover Sheet, Proposal Narrative, and Additional Required Materials. Cover sheet forms, guidelines for what to include in your narrative, and a Proposal Checklist identifying required additional information are available on our website.

ADDITIONAL INFORMATION AND FEEDBACK

- Further information about the Foundation's application process and application forms are available on our website, www.ottobremer.org.
- If you have additional questions about the proposal process and the information needed for a complete proposal, please contact us at **651-227-8036** or toll free at **888-291-1123**.
- We welcome your feedback about the clarity of our guidelines and application process. Please contact us at obf@ottobremer.org.

Date of application: _____ This is an application for a: Grant Program Related Investment

Contact Information

Legal name of the organization according to the IRS (as it appears on most recent 501(c)(3))

President/Executive Director Telephone Email

Organization Address

City State Zip Code

Telephone Fax Website

Name/title of contact person regarding this application Telephone Email

This organization is: 501(c)(3) nonprofit Public agency/unit of government Religious institution

If the organization above is a fiscal sponsor, name of organization/program applying for funding

Address

City State Zip Code

Telephone Fax Website

Summary of Proposed Project

(brief one-sentence purpose description):

Financial Information

Amount requested: \$ _____

Duration of proposed grant period (start/end dates): _____

Total program cost, including requested amount: \$ _____

If applying for general operations, the projected total annual budget: \$ _____

Current year total annual organization budget (of the legal applicant): \$ _____

Board Endorsement

Name of board chair

Signature of board chair

OTTO BREMER FOUNDATION

Proposal Narrative

Please include the following information in your proposal narrative, if applicable, in whatever form you prefer.

I. ABOUT THE ORGANIZATION

- **Background.** Provide a brief summary of your organization's history, mission, goals, accomplishments, and challenges.
- **Current activities and impact.** Describe the organization's current program and activities, impact in the community, and how the community is involved in the organization.
- **Structure and function.** Describe how the organization is structured and how it functions on a day-to-day basis.

II. ABOUT THE PROPOSED GRANT OR PROGRAM-RELATED INVESTMENT

For All Proposals

- **Specific request.** Describe the specific goals, programs, or activities you are proposing; how you will do these things; and what the grant or program-related investment will support.
- **Outcomes and impact.** Describe the outcomes you anticipate achieving through the funded program or activities and the impact you will have, including how the proposed activities would serve the community and how the community will be better as a result.
- **Challenges.** Describe the challenges you anticipate and how you will meet these and others that may occur.
- **Additional funding/sustainability.** Describe how you will fund and sustain these activities beyond this grant or PRI.
- **Fiscal sponsor.** If your organization is serving as a fiscal sponsor for this project, describe how the proposed activities align with or complement your mission.

Additional Information for Organizational Effectiveness Proposals

- **Purpose.** Describe how the proposed activities were identified, what the organization will be able to do as a result, why these activities are needed now, and how they will enable the organization to better serve the community.
- **Process.** Please attach a work plan and describe who will carry out the proposed activities, how the expertise was identified, how the work plan was developed, and how costs were determined.

Additional Information for Program-Related Investments

- **Repayment.** Describe the income stream from which the PRI will be repaid and explain any risks to the organization's ability to repay the loan.
- **Options.** Describe other funding options your organization has considered.

III. ABOUT EVALUATION

- **Determining and measuring success.** Describe how you will know if and when you have been successful and how you will measure success.
- **Sharing results.** Describe how you will communicate results to others, including the Foundation.

OTTO BREMER FOUNDATION

Proposal Checklist

In order for your proposal to be complete, the following items are required. Please mail your completed proposal—**only one copy is necessary**—to: Otto Bremer Foundation, 445 Minnesota Street, Suite 2250, St. Paul, MN 55101-2107.

PROPOSAL COVER SHEET

A form Cover Sheet is available on the Foundation's website, www.ottobremer.org.

PROPOSAL NARRATIVE

An outline of the information to include in your proposal narrative is also available on our website.

ADDITIONAL REQUIRED MATERIALS

Supporting Materials

- IRS determination letter of tax-exempt status defined under Section 501(c)(3) of the Internal Revenue Code, certification of entity status if a public agency, or document indicating that the applicant is a qualified religious organization.
- List of current board members.
- Organizational policy or statement of practice about inclusivity or antidiscrimination, if available.

Financial Information

- Organizational budget with projected revenues and expenses.
- Project budget covering proposed activities (not applicable if requesting general operating support).
- Most recent audited financial statement (if available) and a copy of IRS Form 990 tax return.
- Current year's and previous year's income statement showing actual income and budgeted expenses.
- Current year's and previous year's balance sheet showing assets and liabilities.
- List of other sources of funding for proposed activities, noting whether approved, pending, or declined.

If Applying for an Organizational Effectiveness Grant

- Work plan describing what proposed activities will be carried out, by whom, and when.

If Applying for a Program-Related Investment

- Pro forma showing projected revenues and repayment plan covering the duration of the loan.

Please note that the Otto Bremer Foundation does not accept documents submitted on CDs, DVDs, or any other objects that contain electronic media.