

# HUEY AND ANGELINA WILSON FOUNDATION

## Information for Grant Applications for 2010

### Purpose

Huey and Angelina Wilson were both born and raised in Depression era Louisiana in large families with modest means. In February 2008, Mr. Wilson passed away on his 80<sup>th</sup> birthday. Early on working together as husband and wife, the Wilsons founded a catalog showroom retail business that grew to become the largest company headquartered in Baton Rouge employing 10,000 people and spanning 13 states by the time of its sale in 1985. That same year the Wilsons co-founded an oilfield service business in Houma, Louisiana that today employs approximately 1,800 people. The company is the US largest fabricator of offshore production platforms for installation worldwide.

The Wilson's have been blessed with substantial financial success and have dedicated a meaningful part of their wealth to the Huey and Angelina Wilson Foundation. The Foundation meets semi-annually to review grants and awards competitive grants to non-profit organizations.

An organization must meet two requirements to apply for a grant.

- The organization or its fiscal agent must be tax exempt under Section 501(c)3 of the Internal Revenue Code. (A fiscal agent must submit a letter of agreement.)
- The program or project must serve the greater Baton Rouge area.

The Foundation's present areas of focus are:

- **Human Services:** The Foundation believes it is necessary for the community to identify and meet human needs. We support many different kinds of programs that work to make people's lives better.
- **Healthcare:** Quality healthcare is important to the whole community's well being. We support healthcare education and programs that give people the medical care they need.
- **Education:** The Foundation focuses its support on learning and development from early childhood through high school. We encourage partnerships and activities that bring the community together to build on current strengths and work toward systemic change in areas that can improve educational systems and opportunities for children in our community.
- **Prison Release:** Reducing the recidivism rate affects the entire community. The Foundation supports programs and services that prepare the incarcerated population for release into society with interaction in a community church and a relationship with God.

Of particular interest to the Foundation are the handicapped, both physical and mental, those afflicted with disease, disadvantaged youth, the hungry and the homeless. While care for the less fortunate is important to the Foundation, the Trustees will look particularly favorably on grantees addressing the root cause of the misfortune and where practical or possible assist their targeted group to become self-sufficient productive contributors to the community.

The Huey and Angelina Wilson Foundation believes that communities are strengthened when people begin to see themselves as resources, and find successful ways of marshalling their talents and the talents of local people and organizations to solve problems. The Huey and Angelina Wilson Foundation supports non-profit organizations within the Foundation's present areas of focus that can

demonstrate that they have planned their projects with respect to the community's greatest opportunities. Grant applicants should keep in mind that priority is given to projects that build on strengths and assets of individuals, organizations and institutions and that address the underlying causes of the problems presented rather than treating symptoms. The Foundation is interested in supporting organizations that reflect the diversity of the community they serve in their boards, staff and program focus.

The Foundation will consider grant applications only from non-profit organizations located in the greater Baton Rouge area. The Foundation believes its highest and best use of grant dollars are for capacity building within non-profits. If we can help an organization improve from a "C" performer to a "B+" performer all of its constituencies are helped, clients are better served, staff and volunteers are more efficiently utilized, and grantors and contractors monies are more efficiently expended. The Foundation also provides the following traditional types of grants:

- Program Grants – Program grants support the direct and operational costs needed to support new, creative or beneficial programs. Allowable costs may include staff salaries and benefits, supplies, equipment, travel, office leases, utilities and training.
- Capital Grants – Capital grants are made for new construction, major renovation and the purchase of permanent assets. These grants may cover costs such as phone systems, computers, and technology upgrading as well as vans or buses.
- Bridge Grants – Bridge grants help mature organizations through times of economic hardship. The organization must show that it can sustain itself after the funding ends.

The Foundation does not currently fund endowments or provide seed grants to new organizations. The Foundation's Trustees meet semi-annually to review grant requests from the greater Baton Rouge area addressing the above areas. Grant approvals are competitive with typical approved grants ranging in size from \$10,000 to \$50,000. The median size is expected to be about \$30,000. The Foundation will consider funding two or three grants as large as \$100,000 in 2010.

**In lieu of a concept paper all grants in excess of \$30,000 must be reviewed in reasonable detail with any member of the staff by telephone or in person and receive a verbal approval of the grant concept and size prior to submission of the proposal.**

### **GRANT PROPOSAL SUBMISSION**

Grant proposals are due February 26, 2010 and August 27, 2010. Proposal applications will be accepted only through on-line submission at [www.hawilsonfoundation.org](http://www.hawilsonfoundation.org). The application will be active for the entire months of February and August. If there are any questions or difficulties accessing the application please contact Jan Ross at 225-292-1344.

### **GRANT PROPOSAL REVIEW PROCESS**

After the proposal is submitted, the staff will read each proposal, may call to ask questions, and will have a preliminary meeting to determine site visit candidates. The staff will make the grant recommendations to the full Board of Trustees from which the Trustees will make final decisions.

## **GRANTMAKING SCHEDULE**

Grant requests should be received by 5:00 pm on the deadline date. The deadline and notification dates are:

Deadline Dates:  
February 26, 2010  
August 27, 2010

Notification Dates:  
May 3, 2010  
November 1, 2010

## **AWARD ANNOUNCEMENTS**

If your proposal is not funded, you will receive a letter informing you of the Board's decision. Those who receive funding will get an award check with a letter that states the grant's conditions.

## **REPORTING REQUIREMENT**

If a grant is awarded, the Foundation requires that the funded organization submit both fiscal accounting and narrative reports on the use of the funds and the impact the grant has had on the community it serves. Reporting guidelines are available on the website. These reports are due as follows:

Award Date	Interim Report	Final Report
May 3, 2010	October 1, 2010	March 31, 2010
November 1, 2010	March 31, 2011	September 30, 2011

### **To be considered for future funding, reports must be provided on a timely basis.**

Questions regarding the Foundation should be directed to Dan Bevan, Jan Ross, or Dianne Stephens at the Huey and Angelina Wilson Foundation at:

Phone: 225-292-1344

Fax: 225-292-1589

Email:

Dan Bevan	<a href="mailto:danbevan@hwilson.org">danbevan@hwilson.org</a>
Jan Ross	<a href="mailto:janross@hwilson.org">janross@hwilson.org</a>
Dianne Stephens	<a href="mailto:distephens@hwilson.org">distephens@hwilson.org</a>

Organizations applying for grants should draft a proposal using the following checklist.

### **PROPOSAL CHECKLIST**

It is recommended that the grant be typed using Microsoft Word or other word processing program and copy and paste responses into the online application. There should be no bullets, tables or extra formatting to responses.

- A. **Proposal Summary:** Every application must include a one page summary which provides the following information:
- Organizational name
  - Chief Executive Officer
  - Brief summary of the project (50 words or less)
  - Project Director/Primary Contact – if different from the CEO
  - Address
  - Phone number
  - Compelling reason for the project (50 words or less)
  - Amount of request
  - Beginning and Ending dates of your project
  - Type of request
  - Have you been awarded LANO’s Standards for Excellence Certification?
  - Are you a United Way member agency?
- B. **Narrative Section:** The application should include a narrative in no more than 5 pages of concise information including the following. (To follow the on-line application question 1 including the mission statement should be one page; questions 2-8 should not exceed four pages. Any proposal exceeding the page limit will not be considered.)
1. Mission Statement and a concise history of the organization with an overview of current programs and activities.
  2. Describe the challenge to be addressed by the project. Describe your population and how serious the problem or need is for those that you want to serve.
  3. Describe the program/project for which you seek funding, why you decided to pursue this project and whether it is a new or ongoing project.
  4. What are the goals, objectives and activities/strategies involved in this request? Describe your specific activities/strategies, using a timeline over the course of this request.
  5. Is this type of program or project currently offered in the community, if so please list the organizations providing this service and how your program/project will provide additional value?
  6. Who are the collaborators for this project/program, if any?

7. Explain how your program/project will be evaluated.
  - How do you define success for this effort?
  - What short-term and long-term results will you track?
  - What will you use to measure your program or project's effectiveness? (For example, surveys, pre and post-tests, interviews, etc.) Describe those instruments.
  - How will you keep this data?
8. Plans for continuing the program/project once this funding ends.

C. **Attachments**: The following attachments are required. Please do not send articles of incorporation, state non-profit verification, employer identification certificates, photos, slides or videotapes. Attachments should include the following information:

1. Names and qualifications of persons responsible for carrying out the program. Short biographies are acceptable. No resumes, please.
2. Detailed project budget and budget narrative, including income sources and expenditures, as well as a list of other requests for funding, including those pending and/or approved.
3. A list of the organization's board members including the board members' principal occupations, a description of the term of office and the rotation schedule for the board.
4. Financial statements, including the organization's operating budget, balance sheet and statements of support, revenue and expenses, **year to date** through the most recent date (**within the previous 2 months of submission**) and most recent full year if not covered by the Form 990.
5. Copy of the Internal Revenue Service determination letter stating that the organization or its fiscal agent is tax-exempt under section 501(c)3 of the IRC. Note: The fiscal agent must provide a separate letter stating its willingness to serve.
6. Statement from the organization's board of directors authorizing the request and agreeing to implement the project if funded.
7. The most recently submitted Form 990.
8. If collaborators are involved, letters of support or a signed collaborative agreement.
9. Optional: One copy of supporting material, such as report, brochure or news article.