



LIMONEIRA®

SINCE 1893

THE LIMONEIRA FOUNDATION FUND

A DONOR-ADVISED FUND WITH THE VENTURA COUNTY COMMUNITY FOUNDATION

The Limoneira Company has been building and sustaining community for 125 years. We invest in the economic, social, and cultural vibrancy of the communities in which we live and work. Our areas of interest are 1) Santa Paula and the communities of the Santa Clara Valley including, Piru, Fillmore and Ventura; 2) the rest of Ventura County; 3) Tulare County; 4) Santa Barbara and San Luis Obispo Counties; and 5) Yuma, Arizona.

The Board of the Limoneira Foundation Fund may solicit or recommend grants outside of these funding priorities and/or with broader geographic focus.

Here is a partial list of entities Limoneira Foundation funded last year:

- Boys and Girls Club of Santa Clara Valley
- The Museum of Ventura County
- Ventura College Foundation
- California Agricultural Leadership Foundation
- Women's Economic Ventura
- Growing Works (Turning Point Foundation)
- Assistance League of San Luis Obispo
- Girls Inc. of Carpinteria
- Health Care Foundation of Ventura County

FUNDING OPPORTUNITIES:

Qualified charitable organizations seeking program or project support and completing this application:

- Must be a 501(c)(3) not-for-profit community based organization, school, or other agency providing a public benefit.
- Must have an active Board of Directors.
- Must demonstrate financial viability and capacity to conduct the project to be funded.
- Funds will not be granted for religious activities, or for partisan or political purposes.

Non-charitable organizations seeking funding for either programs or events, and charitable organizations seeking event funding should apply through a separate application available at the Limoneira Company website at www.limoneira.com.



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HOW TO APPLY

PROPOSALS MUST INCLUDE:

A. ONE MASTER APPLICATION PACKET: 3-hole punched, not stapled, collated set of the following:

- Cover Page:** Complete on the supplied form.
- Proposal Narrative:** (The applicant may reproduce the attached Narrative form on a computer.) The narrative must be no more than 3 pages, using at least 12pt font size.
- Application Budget:** Complete on the supplied form.
- List of Board of Directors** and their community or professional affiliations.
- Copy of 501(c) (3) letter** verifying non-profit status.
- DBA Documentation:** If your organization operates under a different name than your tax ID, your DBA paperwork must be submitted.
- Fiscal Sponsorship:** If you intend to submit under a Fiscal Sponsor you must complete VCCF Grantee Fiscal Sponsorship Packet which is part of the application packet.
- Most recent annual audit.** For organizations with an annual operating budget under \$500,000 and/or without audited statements, in-house income & expense statements and a balance sheet are acceptable, but only if verified and signed by two officers of its Board of Directors.

B. FOUR ADDITIONAL COPIES: 4 paper-clipped, 3-hole punched, double sided, and collated sets of the following:

- Cover Page**
- Proposal Narrative**
- Application Budget**
- List of Board of Directors**

APPLICATIONS ARE DUE IN THE FOUNDATION'S OFFICES BY 4 P.M. ON JANUARY 17, 2019.

You may mail or hand deliver your complete application packet to:

Ventura County Community Foundation
ATTN: Limoneira Foundation Fund
4001 Mission Oaks Blvd., Suite A
Camarillo, CA 93012.

(Please note that postmarks are not acceptable and there are no exceptions to the due date and time.)



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COVER PAGE

Organization Name:	Organization EIN:
Address:	Telephone:
Project Name:	FAX:
Project Contact Person:	E-mail:
Executive Director:	Amount Requested:
Number of Persons Served by Organization:	Geographic Area Served by Organization:
Number of Persons Served by Proposed Project:	Geographic Area Served by Proposed Project:



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PROPOSAL NARRATIVE

(To be typed as one document of no more than three pages, using at least a 12 point font.)

PROPOSAL NARRATIVE SHOULD PROVIDE INFORMATION ON ALL TOPICS IN THE ORDER PRESENTED BELOW:

1. **BRIEF DESCRIPTION OF GRANT PROJECT.** Include project name, plus one or two sentence description that can be used in public releases.
2. **AGENCY DESCRIPTION.** Briefly describe why the agency is an important community resource addressing well-documented needs in the community. Include information on major services and programs, number of those served, the organization's record of accomplishments (impact on community needs) and community support (board, volunteers, funding).
3. **COMMUNITY NEED.** Identify the need that the proposed program addresses and how the unmet need was documented.
4. **POPULATION TO BE SERVED.** Define and estimate number of people - include geographical areas, ethnicity and ages - that will be served by the grant project.
5. **PROJECT OBJECTIVES.** Describe intended measurable outcomes that will reduce the above-mentioned community needs, as well as how these outcomes will be measured. (Objectives should be specific, measurable in nature, and achievable within a specified time-period.)
6. **TIMETABLE AND DESCRIPTION OF ACTIVITIES.** Note steps needed to implement and/or run proposed program.
7. **EVALUATION.** Present a plan for measuring degree to which above objectives and outcomes are met *in quantitative terms* and provide the target numbers and units for measuring community benefit and how these measurements will be collected and used in reporting back to VCCF and other funders.
8. **COLLABORATION.** If this project includes referrals from or cooperation with other agencies, please define the nature of the collaboration and identify agency, city, contact name and phone number and attach one copy of letter(s) of agreement.
9. **FUTURE FUNDING PLANS.** Describe any other sources of financial support that have been identified or that are likely for this project. If you receive only partial funding from VCCF, will the project still be viable on a reduced or modified scale? If this is an existing project, what has been the funding history? What are your plans for sustaining this project beyond the grant year?



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PROJECT BUDGET

Organization Name:

Project Name:

LIST TOTAL PROJECT COSTS AND DELINEATE COSTS BEING PROPOSED FOR VCCF FUNDING.

STAFFING (List by position; include salary and personnel costs):

<u>Position</u>	<u>Hours/Salary/Benefits</u>	<u>TOTAL Cost</u>	<u>VCCF Funding</u>

EQUIPMENT/SUPPLIES (List and explain)

OTHER COSTS (List and Explain):

PROJECT BUDGET TOTAL

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OTHER FUNDING (List other funding sources and indicate whether they are secured or pending):

<u>Type</u> (grants, contracts, etc.)	<u>Source</u>	<u>Status</u>	<u>Amount</u>



Ventura County Community Foundation

VCCF POLICY ON FISCAL SPONSORSHIP

A Fiscal Sponsor is a 501(c)(3) tax-exempt organization that agrees to be responsible for the fiscal management of another organization that does not have its own tax-exemption with the Internal Revenue Service. The Ventura County Community Foundation will award a grant to an organization (henceforth, Project) that has a Fiscal Sponsor, with the following conditions:

- A. The Fiscal Sponsor fee will not exceed the greater of \$100 or up to 10% of the total funded direct costs for the grant. Please include this fee in the project budget under *Other Costs*.
- B. The Fiscal Sponsor's Letter of Determination from the IRS verifying its 501(c)(3) tax status is attached with the grant proposal. Other organizational documents requested with the specific RFP (such as financial statements, board roster's, etc.) should be included for both the Fiscal Sponsor Agency and the Sponsee. Please clearly mark which documents belong to each entity.
- C. A signed Fiscal Sponsorship Agreement outlining the role and responsibilities of the Fiscal Sponsor and the Project is submitted with the application. **This document should contain all the following information:**
 1. Date of approval by Fiscal Sponsor's Board of Directors
 2. Effective date of Fiscal Sponsorship Agreement
 3. Agreement between the Fiscal Sponsor and the Project regarding community programs, public information, fundraising events, negotiation of leases and contracts, and other activities planned by the Project
 4. Provide a detailed explanation of how the sponsored project constitutes a charitable endeavor as described in section 170(c)(2)(B) of the Internal Revenue Code. Please include a detailed description of the public benefit and an assurance that sponsored project representatives will not profit from the funded project.
 5. Agreement regarding 501(c)(3) taking full legal liability for accounting for grant income & expenses and reporting on grant activities
 6. Agreement regarding management of Project Funds, including processing and acknowledgement of cash and noncash revenue items, accounts payable and receivable, disbursement of Project funds (including grants), bookkeeping and financial audits
 7. Agreement regarding performance of Activities for Charitable Purposes with stated policies prohibiting the use of funds for political campaigns on behalf of or in opposition to any candidate for public office
 8. Conditions for Termination of Agreement



Ventura County Community Foundation

VENTURA COUNTY COMMUNITY FOUNDATION FISCAL SPONSOR'S INFORMATION

This form is for organizations that do not have an IRS 501(c)(3) tax-exempt status. Grants approved will be made payable to the Fiscal Sponsor as the tax-exempt organization representing the grant seeker. As Fiscal Sponsor, the organization assumes fiduciary responsibilities for this project as though it were a project of the Fiscal Sponsor.

Name of the organization: _____

Address: _____

Executive Director: _____

Organization EIN: _____

Telephone number: _____

E-mail address: _____

The Fiscal Sponsor must send in the following attachments:

1. On agency letterhead, letter signed by the Executive Director and Board President indicating the following information.

Willingness to administer the grant if awarded.

Duration of time and nature of the cooperative relationship between the entities.

List services and frequency that the fiscal sponsor will provide to the grant seeker, e.g., bookkeeping, payroll, benefits, space, grant reporting, reports to the IRS, etc.

Fees for services charged by the Fiscal Sponsor to the grant seeker.

2. Copy of Minutes from Board meeting approving the fiscal sponsor relationship.

3. List of Board members.

4. Copy of the Fiscal Sponsor's most recent IRS letter indicating 501(c)(3) tax-exempt status.

5. Copy of current operating budget including year-to-date financial information.

6. Copy of annual report.

7. Copy of the financial audit.

8. If the grant is awarded, it will be the Fiscal Sponsor's responsibility to ensure that all reports and submissions are provided in a timely manner to VCCF. (Reporting dates will be on the Terms of the Grant Award.)

Fiscal sponsors and grant seekers must sign below indicating that they have read this list of requirements.

Fiscal sponsor

Grant seeker

Date

Date