

2017
Open Stewardship Program
Application

APPLICATION MUST BE POSTMARKED BY NOVEMBER 30, 2017

Please mail or hand-deliver your completed application to:

**Open Stewardship Program
c/o Open Stewardship Foundation**

**1000 Wilshire Blvd. #500
Los Angeles, CA 90017**

For any further inquiries, please contact:

(213) 593-4885



OPEN STEWARDSHIP FOUNDATION

STEWARDSHIP PROGRAM FUNDING GUIDELINES

PROGRAM OVERVIEW

The Open Stewardship Foundation was established in 2011 by Open Bank for public and charitable purposes. Open Bank was established in 2005 as a California state-chartered bank headquartered in Los Angeles, California. In October 2010, Open Bank was reborn with a new focus and vision on relationship banking and giving back ten percent (10%) of its income to the communities it serves.

The primary objectives and purposes of the Stewardship Program (“Program”) is to actively support local civic and public service organizations and schools that advance education, help the needy, provide medical care and/or rehabilitation, provide food for the hungry, promote job growth, and offer other charitable and public benefit services.

Through this program, the Open Stewardship Foundation hopes to extend and strengthen its ties to local communities and demonstrate that it sincerely wishes to enhance the overall health and welfare of the communities we serve.

ELIGIBLE APPLICANTS

- A civic non-profit organization which provides direct health care, youth activities, elderly care, disabled persons care, special needs programs for women, assisted living, job growth, or educational programs.
- A christian non-profit organization which provides food, shelter, career training, or supports to serve under- privileged communities with agricultural, educational, health assistance, and spiritual guidance.
- The applicant must be a non-profit organization with a **501(c)(3)** tax-exempt status.

NON-ELIGIBLE APPLICANTS

- Political action committees.
- For profit organizations or businesses.
- Loans or program-related investments (e.g. gap/bridge funding, speculative activities, etc) businesses.
- Fundraising events, or related activities.
- Individual churches, seminaries, individuals, or group missionaries.
- Public media organizations (e.g. Newspaper, Radio, TV).

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DOCUMENTATION

I. New Applicants *

- All applicants must provide the following documents:
 - 1) Application Cover Sheet.
 - 2) **501(c)(3)** tax identification documents.
 - 3) 2-years of **signed** tax returns.
 - 4) 3-months of their most recent bank statements.
 - 5) A comprehensive and detailed description of organization overview-Application Narrative (refer to the Narrative Guideline on page 6).
 - 6) A comprehensive and detailed description of the proposed program, project, and activity (with Projected Budget).

* “New applicants” are defined as all applicants, except for last year’s (2016) Open Stewardship Program Recipients.

II. 2016 Open Stewardship Program Recipients ONLY

- An applicant who was last year’s (2016) Open Stewardship Program recipient must provide the following documents
 - 1) Application Cover Sheet.
 - 2) **501(c)(3)** tax identification documents.
 - 3) Most recent **signed** tax returns.
 - 4) 3-months of their most recent bank statements.
 - 5) A comprehensive and detailed description of the proposed program, project, and activity (with Projected Budget).
 - 6) A comprehensive and detailed description of the results and performance of previous year’s proposed program or project.
 - 7) **A detailed list of expenses regarding the previous years’ funding.**

APPLICATION SUBMISSION PROCESS

1. Complete the Application Cover Sheet.
2. Attach all required documents.
3. Review the checklist to ensure your application is complete and accurate.
4. **Submit one (1) original application package, stapled.** The application package must include the application and all of the requested documents and forms.
5. All applications must be received by the due date.
6. Applicants can only submit one application per agency per calendar year.
7. The selection committee may ask some applicants to make a presentation about the program. The presentation date will be scheduled after initial review of an applications.

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FUNDING GUIDLINES

- The Open Stewardship Foundation reserves the right to award less than the amount requested.
- The Open Stewardship Foundation reserves the right to disburse the funds in a manner it deems most appropriate, in accordance with the nature of the project/program.
- It is strongly recommended that the recipient open an account with the Open Bank and the funds were deposited directly into the account.
- Recipients **must** be present at the Award Ceremony to receive their funds.
- Recipients are subject to post –review of the program and fiscal audits to ensure that program funds are being used in the designated manner.

REVIEW CRITERIA AND PROCESS

I. The funds will be awarded based on the following criteria:

- Applicant meets the funding eligibility criteria.
- Applicant’s history, experience and capacity to successfully implement the proposed activities.
- Demonstrated impact/benefit to the community and its members.
- Program/project implementation feasibility.
- Applicant’s financial capacity.
- Sustainability of the program/project.
- Transparency of the program/project.
- Purpose of Funding should be measurable.

II. Applications process:

- The applications will be initially reviewed to determine if the application meets the eligibility of the program criteria.
- After the initial review, applicants may be asked to make a presentation of their proposal and the representative from the Open Stewardship Foundation may make a visitation to the organization site.
- Based on review of the documents, applicant’s presentation and visitation, the final recipients and grant amount will be determined.

Open Stewardship Foundation reserves the right to make exceptions for projects that may not meet all of the abovementioned criteria or conditions but nonetheless merit special consideration, according to their nature.

PROGRAM TIMELINE

<i>Public announcement</i>	<i>October 2, 2017</i>
<i>Application deadline</i>	<i>November 30, 2017</i>
<i>Final selection</i>	<i>February 28, 2018</i>
<i>Award Ceremony (Fund Distribution)</i>	<i>March 22, 2018 (tentative)</i>

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STEWARDSHIP PROGRAM APPLICATION

GENERAL INSTRUCTIONS

The Program Application can be downloaded from the Open Stewardship Foundation web site (www.openstewardship.com). ***Completion of the application on the PDF is highly encouraged.***

* Please be thorough and clear when providing requested information.

Submit one (1) original completed application to the Open Stewardship Foundation per instructions under the Application Guidelines.

The applications must be POSTMARKED by November 30, 2017. No exceptions will be made for late applications. All applications submitted to the Open Stewardship Foundation will remain at the Open Stewardship Foundation and will NOT be returned to applicants under any circumstances. Therefore, be sure to keep a copy of your application for yourself.

Applications should be mailed to the following address:

**Open Stewardship Program
c/o Open Stewardship Foundation
1000 Wilshire Blvd. #500
Los Angeles, CA 90017**

APPLICATIONS WILL NOT BE ACCEPTED VIA EMAIL.

APPLICATION CHECKLIST

Please check and provide one (1) original of the following documents:

- _____ 1. Application Cover Sheet.
- _____ 2. Application Narrative.
- _____ 3. 501 (c)(3) Tax Identification Documents or tax-exempt status documents.
- _____ 4. Applicant's last 2 years of **SIGNED** tax returns. (1 year–returning applicants)
- _____ 5. Applicant's 3 months bank statements.
- _____ 6. Description of proposed program, project, and activity (with Projected Budget).
- _____ 7. Detailed list of expenses regarding previous years' funding (Returning Applicants).

** See page 3 for other requirements.

STEWARDSHIP PROGRAM NARRATIVE GUIDELINE

Please use the following outline for your application narrative. Under each section are general guidelines for the type of information that is expected and the suggested length of your response. **The application narrative may be no longer than five (5) pages.**

APPLICANT OVERVIEW (1-2 pages)

- Describe the applicant's mission
- Describe the applicant's experience and accomplishments.
- Describe the staff and/or volunteer composition at your agency.
- Describe the qualifications of staff/volunteers who will be involved in the proposed activity(ies).

PROPOSED PROGRAM/PROJECT/ACTIVITY DESCRIPTION (1-2 pages)

- Describe the program, project, or activity that you would like to be funded: include a time frame for implementation.
- What are the objectives that your organization would like to successfully accomplish through this award? How are these objectives measurable, if at all?
- How does your organization plan to successfully accomplish this program/project/activity? What would change from the current format? What would stay the same?
- ***For 2016 Open Stewardship Program recipients, please describe specifically how the prior year grant was used. This must be described in detail to qualify for continued funding.***

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STEWARDSHIP PROGRAM APPLICATION COVER SHEET

Organization Name: _____

Organization Address: _____

City/State/Zip: _____

Website: _____

Phone No.: _____ Fax No: _____

Executive Director/
Organization Head: _____

Contact Person: _____

Title: _____

Phone #: _____

Email: _____

**** Be sure to specify the use of this grant in the application narrative section per its guideline***

Amount Requested: _____ Annual Operating Budget: _____

Population Served (check all that apply)

<input type="checkbox"/> Elderly	<input type="checkbox"/> Developmentally Disabled
<input type="checkbox"/> At-risk Youth/Children	<input type="checkbox"/> Domestic Violence Victims
<input type="checkbox"/> Low/Moderate income Family or Individual	<input type="checkbox"/> Homeless
<input type="checkbox"/> Other: _____	

Purpose of organization or service (check all that apply)

- Not-for-profit, tribal, or government organization that services low- or moderate-income housing needs or economic revitalization and development
- Organization facilitating affordable housing construction, rehabilitation, or development
- Organization that targets community services to low- or moderate- income individuals or revitalizes or stabilizes low- or moderate-income areas
- Organization or group that helps meet the credit needs of small business or small farms
- Organization or group that helps meet the credit needs of low- or moderate individuals
- Other (describe): _____

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Have you applied for the Open Stewardship Program last year? Yes No

Did you get funded? Yes, Amount: _____ No

**Be sure to describe specifically how the grant was used in the application narrative section per its guideline*

I, the undersigned, hereby authorize Open Stewardship Foundation to use all photos/videos that we submit and any photos/videos taken during the award ceremony for press release, newspaper posting (no commercial purposes), and/or Open Stewardship Foundation Website posting. Yes No

SIGNATURE: _____

DATE: _____

EXECUTIVE DIRECTOR / ORGANIZATION HEAD