

# Grant application guide for non-profits

January 2019

Together we'll go far



### www.wellsfargo.com/donations

### Community Giving













### Creating solutions for stronger, more resilient communities

We know that our long-term success is directly linked to the success of our customers and the communities we serve. Through a combination of strategic relationships with local and national nonprofits, grants, volunteer activities, and other community investments, we're creating solutions that help strengthen the communities in which we operate and grow local economies around the world.

- Philanthropy
- Community outreach and grant programs
- Team member volunteering and giving

#### Corporate Social Responsibility Report

Learn more about how we're working to create solutions for stronger, more resilient communities.

Goals and Reporting >

### www.wellsfargo.com/donations

### Apply for grants

The Wells Fargo Foundation welcomes applications year-round from qualified nonprofits and educational programs. To apply, review our grant guidelines for the areas we serve.

Select State: Select one Select your State.

#### Creating solutions for stronger communities

We understand that our long-term success is directly linked to the success of our customers and the communities we serve.

#### Resources

- Wells Fargo Housing Foundation
- Environmental Grant Programs
- Wells Fargo Regional Foundation

### **Review Giving Guidelines**

#### Alabama Grant Guidelines

We appreciate your interest in Wells Fargo's philanthropic goals and objectives. At Wells Fargo, we believe that grant-making decisions are more effective when made locally. That's why Wells Fargo is actively involved in the communities where we live and work, and why our team members are leaders in helping our communities succeed.

In Alabama, we serve the following regions and counties:

Region	Counties
Birmingham	Jefferson, Shelby
Central Alabama	Autauga, Clay, Calhoun, Dallas, Elmore, Etowah, Lee, Marion, Montgomery, Pike, Randolph, Tallapoosa, Talladega, Tuscaloosa
North Alabama	Colbert, Cullman, Lauderdale, Madison, Marshall, Morgan, Walker

Wells Fargo makes contributions to organizations with tax-exempt status under Section 501(c)(3) of the U.S. Internal Revenue Code, as well as qualified tribal and governmental agencies, including public school systems.



### **Begin application process**

### Select "Apply Now"



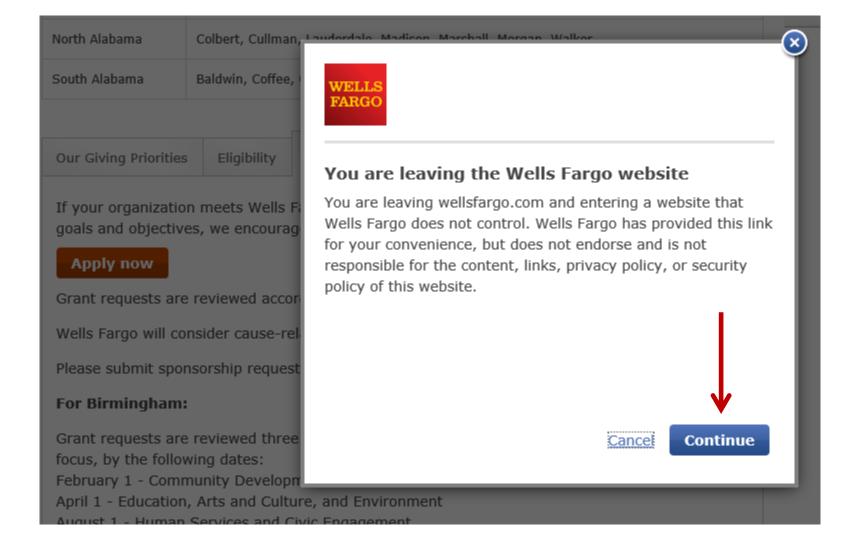
If your organization meets wells Fargo's eligibility requirements and fits in with our philanthropic goals and objectives we encourage you to proceed with our online application.

#### **Apply now**

Grant requests are reviewed according to the deadlines below.

Wells Fargo will consider cause-related requests submitted through our online application system.

Please submit sponsorship requests on the same online form at least 60 days prior to the event.



#### Wells Fargo Grant Application - Eligibility Quiz

Do you represent a U.S. based IRS qualified charitable 501(C)(3) organization with a valid Tax ID #? If so, do you certify that you are an official representative and have authority to submit an application on behalf of the organization?

Yes

No

If Yes answer, proceed to next question.

If No answer, the following response: Unfortunately your request does not align with any of our funding priorities. Thank you for your interest.

Does the project/program align with one or more of Wells Fargo's focus areas?

#### Yes

No

#### Education

- · academic and community outreach to Pre-K 12 children
- post secondary educational opportunities

#### Community Development

- affordable housing for low-to-moderate income individuals
- job training/workforce development
- economic development programs
- revitalization or stabilization of low-to-moderate income communities

#### Health/Human Services

 social and human care organizations involved in a variety of issues including child care, day care, health services and education, social services, and basic needs assistance

#### Arts and Culture

- · arts councils, literature, and arts organizations
- museum programs and operating support
- performing arts programs and operating support

#### Civic

 organizations and associations that enhance a community's quality of life; including community beautification, civic leadership, citizen education, and promotion of cultural diversity

#### Environment

 programs where the primary purpose is preservation and conservation of natural resources, endangered species, and the global environment

If Yes answer, proceeds to next question.

If No answer, the following response: Unfortunately your request does not align with any of our funding priorities. Thank you for your interest.

#### Wells Fargo Grant Application - Eligibility Quiz

Great, continue to the next question.

Are you seeking funding to support any of the following:

- Individuals
- International organizations
- Travel or conferences for employees of non-profit organizations
- · Political Action Committees (PACs), political causes or candidates
- Books, research papers or articles in professional journals
- A group/organization utilizing a fiscal agent

If Yes answer, the following response: Unfortunately, we cannot provide funds to:

- Individuals
- International organizations
- Travel or conferences for employees of non-profit organizations
- Political Action Committees (PACs), political causes or candidates
- Books, research papers or articles in professional journals

Thank you for your interest.

Yes

No

#### If No answer, proceeds to the following response:

Thank you for taking the time to answer this eligibility quiz. Based on your answers, it appears that your organization qualifies to complete the Wells Fargo grant application. Final verification will be made subsequent to submission. Please click the link below to access and submit an application. You may utilize the "Need Support" button at the bottom of each page if you have any problems or need assistance. Thank you.

Click here to access the Wells Fargo Grant Application



# Access to online application



Home | Customer Service | Contact Us | Locations

**Back to Corporate Giving** 

#### Wells Fargo Grant Application

#### Please Log In





successfully log in.

### First time user registration

\* Zip/Postal Code:

### Registration Information \* indicates required field Leave the invitation code field blank unless one has been provided to you by Wells Fargo. If provided, please enter the code each time you log in to access your application. \* First Name: \* Last Name: \* indicates required field \* Telephone Number: \* E-mail Address: Please enter your e-mail address, e.g. yourname@yourdomain.com. You will need your e-mail address to log in. \* Password: The password must be between 7 and 12 characters. Any letter or number is valid. The following special characters are also allowed '!#\$-\_'. The password 'password' is not valid. \* Confirm Password: Invitation Code: Enter the invitation code if you were provided with one by the grantmaking organization.' \* Organization/School Name: Enter the legal name of the organization for which you are applying.

### First time user Registration

#### IRS AND/OR NCES Information

Tax ID/Charity ID (if applicable): Enter the nine digit U.S. Tax ID of the 501(c)(3) non-profit organization for which you are applying. If you do not know the organization's Tax ID, please contact the business office of the organization or call the IRS toll-free at 1-877-829-5500. If your organization is not located in the United States or otherwise does not have a U.S. Tax ID number then

leave this field empty.

Tax ID # required

School District ID (U.S. Pre-K-12 public schools and For U.S. public schools, the District ID should be the first 7 digits of a 12 digit National Center for Education Statistics public school districts only): (NCES) School ID. If you do not know the school's NCES information, please visit the NCES website.

School ID numbers are required for public schools/school districts only; 501(c)3 organizations should not enter School ID numbers.

School ID (U.S. Pre-K-12 public and private schools For U.S. public schools, the School ID should be the last 5 digits of a 12 digit National Center for Education Statistics only): (NCES) School ID. For private schools, the School ID should be the 8 digit NCES School ID. If you do not know the school's NCES information, please visit the NCES website.

Save

Return to Login Screen

Need Support?



### **Welcome Page Information**

#### Welcome, Marian Phillips!

#### Welcome, Marian Phillips!

The organization you are currently associated with is CYBERGRANTS TEST ORGANIZATION.

If you work with multiple organizations and want to submit an application for an organization different from the above, please add a new organization to your account.

#### Application Overview

The Wells Fargo Grant Application consists of the following five sections. Each section must be completed in order to submit your proposal.

- Contact Information
- Organization Information
- Project Details
- Demographics

Once submitted, your application cannot be modified, so you may wish to familiarize yourself with a READ-ONLY version of the online application before beginning.

READY TO BEGIN? Click the "Start a New Application" link at the end of these instructions.

### **Welcome Page Information**

#### **Helpful Hints**

Before you begin, we recommend that you review the following:

- To save an in-progress application and return to work on it later: Close your browser after clicking the "Save and Proceed" button.
- To return to your saved application: Type the following URL in your browser's address bar to gain access the login screen directly:

#### www.cybergrants.com/wellsfargo/communitygrants

You may wish to bookmark this link for future reference.

Once you've logged in again, click the "Continue" link to the left of the application's Project Title, below.

- To delete an incomplete or erroneous application that you've started: Click the trash can icon next to its Project Title, below.
- To print a paper copy of your completed application: Prior to submitting your application you will see a summary screen of your entire application. Select "Print" from your web browser's "File" menu.
- To review an application that your organization has previously submitted: Click the "View" link next to the appropriate Project Title below.

NEED HELP? If you have technical questions regarding this application, use the "Need Support" link located at the bottom of every page to contact our support team.

### **Welcome Page Activity**

#### Navigation

Each section of the application will have a timeline like the one below to help you monitor your progress. The arrows (>> )indicate your current position. Clicking a link in the timeline will take you to that section.

	Welcome Page	Organization Information	Contact Information	Proposal Information	Demographics
			Applications Requiring Action	Return to this section in process or to subm	to complete an application it an impact report.
Action		Project Title	Applicati	ion Date	Application Amount
Continu	ue National Partnerships	Grant Application 🏛	01/21/20	)14	\$5.00
Continu	Participation in Home F Wells Fargo Mortgage I	Preservation Workshop held for Holders 🏛	10/13/20	014	\$0.00
Continu	ue Priority Markets Progra	m 🛍	03/11/20	014	\$0.00
			Submitted Applications	Section provides view acc	cess to historical requests.
Action		Project Title		Application Date	Application Amount
View	Priority Markets Program			02/05/2015	\$500.00
	» Start a New Application «			*	

Telephone

7043746128

Organization Information



Official Name	Name associated with specific tax ID in the IRS business master file or name associated with school/school district in NCES data
* Legal Name	What is the legal name of your organization?
	CYBERGRANTS TEST ORC
AKA Name	If your organization is known by another name please enter the name here.
	СТО
* Mailing Address	Enter the address where a check should be mailed.
	790 TURNPIKE STREET SL
Address 2	
* City	NORTH ANDOVER
* State	Massachusetts ▼
* ZIP Code	01845-6129

Samzati				
Website Address	www.website.org			
Year Organization was Established	2000			
Mission Statement	Provide a brief mission statem	ent for your organization	on.	
	support lmi	^		
	(689 character(s) remaining)	~		
* LMI/Small Businesses Served? (?)	Does your organization serv less of the area median fami		nd moderate-income (LMI) populations (those usinesses?	earning 80% or
	Click on the question mark to t	he left for definition of	LMI and Small Businesses.	
			Low-and moderate-income (LMI): Individuals earning 80% or less of the area median income. Median Family Income can be accessed using the FFIEC website. Find current year FFIEC Estimated MSA/MD/non-MSA/MD	

- Median Family Income from the table for the appropriate geography and multiply by 0.8.
- Small Businesses: Businesses with gross annual revenues of \$1 million or less or that meet the size eligibility requirements of the Small Business Administration's (SBA) Small Business Development Company or Small Business Investment Company (SBIC) programs.

#### If Yes:

Low- to moderate- income (LMI) populations served? (?)	If your organization primarily (more than 50%) serves low- to moderate- income populations, indicate the % of LMI served. Click on the question mark to the left for definition of LMI.
Small Businesses served? (?)	Enter whole numbers only; numbers must total 100.  % LMI  % Non-LMI  If your organization primarily (more than 50%) serves small business, indicate the % of small businesses served. Clic on the question mark to the left for definition of Small Business.  Enter whole numbers only; numbers must total 100.  % not applicable  % of small businesses served
LMI/Small Business data estimated or actual:	Please indicate if the information provided above is estimated or actual.  Actual  Estimated
Data contact at organization:	Enter the name and title of the individual supplying the LMI/Small Business data above.

#### DOCUMENTATION REQUIREMENT

You must upload an IRS W-9 form with a **October 2018** revision date. Earlier versions of the form will not be accepted. Download the form from here and then complete, sign, and upload the form. Enter your organization name in the "Name" field at the top of the form. If you previously uploaded an older version of the form, you must now upload a fully completed **October 2018** version. Not adhering to this documentation requirement will cause a delay in our review of your grant application.

\* IRS W-9 Form

An IRS W-9 form is required. Note that we must have the October 2018 version of the form, available here. Click here to download IRS W-9 form.

Note: Maximum file size is 10 MB any file format is acceptable.

Upload File

Is your organization classified as a 509(a)3 supporting organization by the IRS?



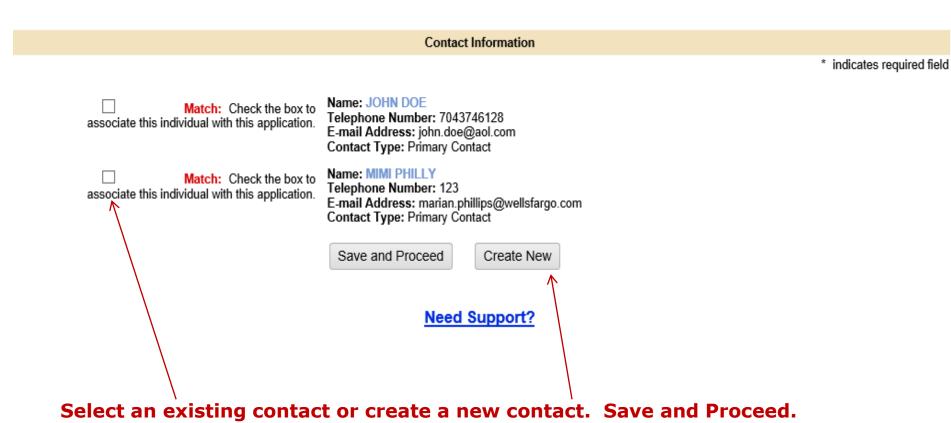
509(a)3 documentation requirement

If you are a 509(a)(3) supporting organization, please upload one of the following: (1) IRS Letter stating that the organization is Type I, II or III; or (2) external legal opinion stating that the organization is Type I, Type II, Type III (functionally integrated or not functionally integrated) with a reasoned explanation that references the IRS tax code and illustrates how their organization's governing structure fits into Type I, II or III.

Upload File

Save and Proceed

### **Contact Information**



#### Proposal Information

indicates required field

* Request Date	Request Date	
	01/08/2019	
* Requested Grant Amount	(In U.S. dollars)	

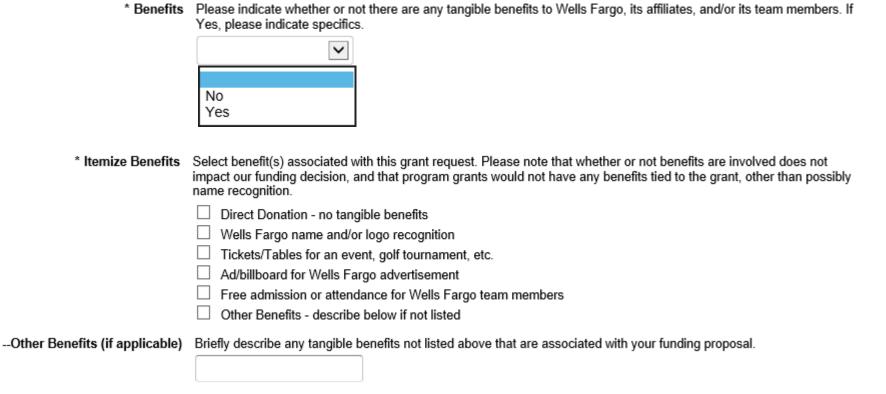
\* Project Title Very brief description, or name of program or event. (Please limit to 70 characters.)

\* Funding Purpose - Project Description Provide a brief description of how funding will be used. If there is a sponsorship package associated with this request, please upload the brochure/materials in the Detailed Project Information field below.



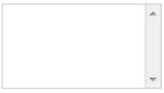
Detailed Project Information Attach a detailed project description or sponsorship brochure, if appropriate. Note: Maximum file size is 10 MB any file format is acceptable.

Upload File





Location of Event or Project If you are seeking a sponsorship/contribution for a charitable event, provide the location of the event. OPTIONAL: for project/program grants, please enter the project address.



(500 character maximum)

Event Date or Project Timeline If you are seeking a contribution/sponsorship for a charitable event, provide the date (xx/xx/xxxx) of the event. OPTIONAL: for project/program grants, please enter the anticipated timeline.

\* Low to Moderate Income Group/Small Businesses Served? (?)

Low-and moderate-income (LMI): Individuals earning 80% or less of the area median income. Median Family Income can be accessed using the FFIEC website (https://geomap.ffiec.gov/FFIECGeocMap/Geoco deMap1.aspx). Find current year FFIEC Estimated MSA/MD/non-MSA/MD Median Family Income from the table for the appropriate geography and multiply by 0.8.

Small Businesses: Businesses with gross annual revenues of \$1 million or less or that meet the size eligibility requirements of the Small Business Administration's (SBA) Small Business Development Company or Small Business Investment Company (SBIC) programs.

Will the project/program funded by the grant proceeds primarily (more than 50%) benefit low- and moderate-income populations and/or small businesses?

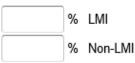
Click on the guestion mark to the left for definition of LMI and Small Business.



#### If Yes:

moderate-income clients served:

numerals



businesses served:  Description of LMI/SB Populations Served:	% Small Businesses Served % Not applicable to small businesses	

(1000 character maximum)

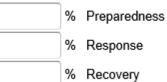
\* Disaster Relief Efforts Does event/project/program support Disaster efforts?

(A disaster is a weather related or catastrophic event that causes damage of sufficient severity and magnitude to warrant major disaster assistance to alleviate the damage, loss, hardship, or suffering.)



#### If Yes:

Provide the percentage of grant going towards preparedness, response and recovery. Disaster Relief Percentages (?)



Preparedness: A continuous cycle of planning, organizing, training, equipping, exercising, evaluating, and taking corrective action in an effort to ensure effective coordination during incident response. Response: Immediate actions to save lives. protect property, and meet basic human needs. Response also includes the execution of emergency operations plans and of mitigation activities designed to limit the loss of life, personal injury, property damage, and other unfavorable outcomes. Recovery: Short-term and long-term efforts for the rebuilding and revitalization of affected communities. Examples: Short-term recovery focuses on crisis counseling and restoration of lifelines such as water and electric supply, and critical facilities. Long-term recovery includes more permanent rebuilding.

Disaster Efforts: Name/type of disaster	Please enter the name and/or type of the disaster(s) to be supported by this funding request.
* Form 990 and Financial Statement	Most recently filed IRS form 990 including schedule A, if applicable, (can be downloaded from guidestar.org); and more recent financial statement, audited if available. We encourage you to upload both documents in order for us to be able to fully review your application.  Note: Maximum file size is 10 MB any file format is acceptable. If your file exceeds the maximum file size, please breatyour document down into more than one file in order to upload.  Upload File

Resizing Instructions If your file is too large, please click here for instructions on how to resize your file.

* Organization's Total Operating Budget	In U.S. dollars
Organization's Most Recent Operating Budget	Attach the organization's most recent operating budget.  Note: Maximum file size is 10 MB any file format is acceptable.
	Upload File
* Total Project Budget	(In U.S. dollars)
Detailed Project Budget	Attach a detailed project budget.  Note: Maximum file size is 10 MB any file format is acceptable.
	Upload File
* Other Funding Sources	Detailed Instructions:
	<ol> <li>Click the link below to <u>SAVE</u> the template below to your computer.</li> </ol>
	Other Funding Sources Template

4. You will need to BROWSE to locate the file on your computer. Select your file and select the 'Open' button.

2. Complete the Other Funding Sources Template and save your changes. 3. Click the 'Upload File' link to attach the template to this application.

Click on the 'Upload File' button.

Note: Maximum file size is 1 MB any file format is acceptable.

Upload File

\* Is your organization operating in a deficit? \* Organization's Current Board Members with Please attach a listing of the organization's current board members and their affiliation(s) (e.g. corporate or government Affiliations, including Corporate Affiliations affiliation) Note: Maximum file size is 10 MB any file format is acceptable. Upload File Organization's Goals and Accomplishments Please list the goals and accomplishments of the organization. (2000 character maximum) Measure of Progress Briefly describe how you measure progress for this program. (2000 character maximum)

\* Sustainable Development Goals

Sustainable development has been defined as development that meets the needs of the present without compromising the ability of future generations to meet their own needs. The 17 Sustainable Development Goals (SDGs) are a universal call to action to end poverty, protect the planet and ensure that all people enjoy peace and prosperity. For specific information on SDGs, please go to the following web site: Click here

Wells Fargo is committed to supporting the SDGs and tracking how our giving aligns with these goals, listed below. Please select all goals that apply to the project/program for which you are seeking funding.

No Poverty
Zero Hunger
Good Health and Well-Being
Quality Education
Gender Equality
Clean Water and Sanitation
Affordable and Clean Energy
Decent Work and Economic Growth
Industry, Innovation and Infrastructure
Reduced Inequalities
Sustainable Cities and Communities
Responsible Consumption and Production
Climate Action
Life Below Water
Life On Land
Peace, Justice and Strong Institutions
Partnerships for the Goals

Click the link above to learn more about the United Nations Sustainable Development Goals.

Save and Proceed

* Notification Information	Please indicate who at grantee organization should be notified of check delivery (enter name and email address) if grant is awarded. This information will display on electronic payment notification sent to grant seeker.
	(100 character maximum)
Wells Fargo Contact?	Indicate the name and email address of the organization's primary contact at Wells Fargo, if any. Enter "N/A" if not applicable.
	This question is intended for informational purposes only. The existence of a business relationship with Wells Fargo will not affect an organization's consideration for grants by the Wells Fargo Foundation.
	(100 character maximum)
Additional Documentation	Note: Maximum file size is 10 MB; any file format is acceptable, except html
	Upload File

#### Demographics

\* indicates required field

We gather the following data for tracking purposes only and do not base our grant decisions on the information collected. We do not share your specific information with any other organization. We refer to this information as we seek to measure our giving history against our diversity mission. Our diversity mission encompasses a commitment to being an inclusive company where all people are treated fairly, recognized for their individuality, promoted based on performance, and encouraged to reach their full potential. We believe in recognizing, understanding, and respecting differences among all people.

3 3, 3, 1 3	, , , , , , , , , , , , , , , , , , ,
	ethnicity, color, gender, national origin, religion, age, sexual orientation, gender identity, genetic information, physic otected veteran or any other status protected by federal, state or local law?
V	
If yes, please explain basis for discrimination (e.g. organization serves only one gender).	Note that organizations who respond 'yes' may be subject to additional review.
Impact	How many individuals will be served by this project/program?



Hispanic or Latino (Ethnicity): Cuban, Mexican, Chicano, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race.

American Indian/Alaskan Native (Race):
Origins in any of the original peoples of North
America, people who maintain cultural
identification through tribal affiliation or
community recognition; not of Hispanic or Latino
origin.

Asian (Race): Origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam; not of Hispanic or Latino origin.

Native Hawaiian or Other Pacific Islander (Race): Origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands; not of Hispanic or Latino origin.

White (Race): Origins in any of the original peoples of Europe, North Africa, or the Middle East; not of Hispanic or Latino origin.

Two or More Races: People who identify with more than one of the above five races; not of Hispanic or Latino origin. What is the breakdown of those to be served by this grant, if awarded?

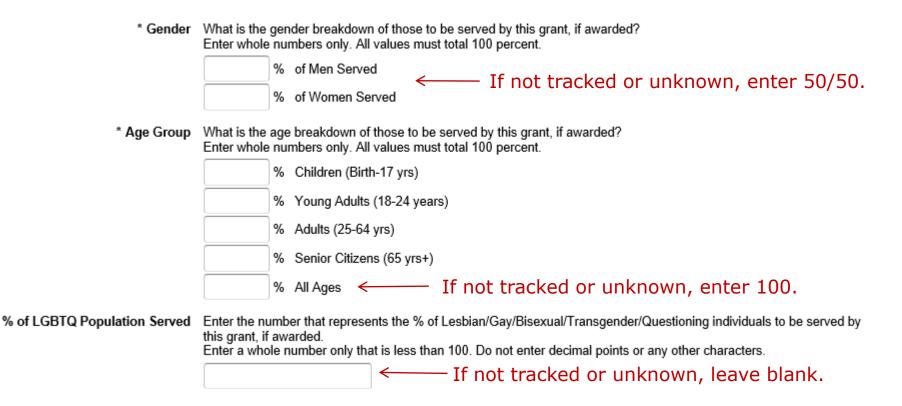
Enter whole numbers only. All values must total 100 percent.

Click on the "?" to the left for category definitions and please provide your best estimate if this number is not officially tracked by your organization.

%	Hispanic or Latino
%	American Indian/Alaskan Native
%	Asian
%	Black or African American
%	Native Hawaiian or Other Pacific Islander
%	White ← If not tracked or unknown, enter 100.
%	Two or More Races (Multi-Racial Individuals)

Complete all demographic information, if known.

Enter whole numbers only. Do not enter % sign in any field.



Disability is defined as: The apparent or non- apparent effect of an impairment that may be physical, cognitive, mental, sensory, emotional, developmental, or some combination of these that substantially limits one or more major life activities.	Enter the percentage of support for Persons with Disabilities (PWD) to be served by this grant, if awarded. Entries must total 100%.  % PWD  % Non-PWD  — If not tracked or unknown, enter 100.
* Support for Military Service Members and/or Veterans	Enter the percentage of military service members and/or veterans to be served by this grant, if awarded. Entries must total 100%.    We have the percentage of military service members and/or veterans to be served by this grant, if awarded.    We have the percentage of military service members and/or veterans to be served by this grant, if awarded.    We have the percentage of military service members and/or veterans to be served by this grant, if awarded.    We have the percentage of military service members and/or veterans to be served by this grant, if awarded.    We have the percentage of military service members and/or veterans to be served by this grant, if awarded.    We have the percentage of military service members and/or veterans to be served by this grant, if awarded.    We have the percentage of military service members and/or veterans to be served by this grant, if awarded.    We have the percentage of military service members and/or veterans to be served by this grant, if awarded.    We have the percentage of military service members and/or veterans to be served by this grant, if awarded.    We have the percentage of military service members and/or veterans to be served by this grant, if awarded.    We have the percentage of military service members and/or veterans to be served by this grant, if awarded.    We have the percentage of military service members and/or veterans to be served by this grant, if awarded.    We have the percentage of military service members and/or veterans to be served by this grant, if awarded.    We have the percentage of military service members and/or veterans to be served by this grant, if awarded.    We have the percentage of military service members and the percentage of military service m
* Geographical Area Served:	Select the State where the project/program is being served. If this grant will provide services nationally, select "National." If this grant will provide services in more than one State, select "Multi-State."
* Geocode - Area Served	Enter 5 digit zip code to indicate where the majority of the grant funds will be utilized.

### **Review Application**

- At this time, you will have the opportunity to review your application. This is your opportunity to edit any of the information that has been entered before submitting the application.
- If edits are necessary, please click on that individual section. Once that change is made select save and proceed until you return to the "Review Your Application" page.



### **Submit Application**

 Submit your application by selecting the "Submit" button at the bottom of the page.



You will receive an email confirmation acknowledging our receipt of your application.

### **Tool Tips**

Need Support?

This link is available on each page and will connect you to the help desk when utilized.

Save and Proceed

This icon will save all information entered and advance you to the next section of the application.

\* indicates required field

Fields with an \* must be completed in order for you to submit your application.

Contact Information Organization Information Proposal Information Demographics Community Development Support

You may navigate among the different application sections without completing all fields. You do not have to complete the application at one time; you may re-enter the site as often as necessary to complete the application prior to submission. Once submitted, you may not make any additional changes to the application. Thank you for your submission.