



GRANT INFORMATION

Davidson's Giving Grant mission is to help others in our communities by providing financial support to non-profit organizations in the Health & Wellness and Education fields.

Organizations that fall in these categories are designed to aid individuals and families who are financially disadvantaged, lack access to basic health and human services, or are otherwise disadvantaged and require the assistance of others to meet their basic needs for food, clothing, shelter, medical care and other fundamental needs.

Eligible non-profit organizations may apply for Davidson's Giving Grants by applying based on the following information and instructions.

Eligibility

- Must be a non-profit organization recognized under section 501(c)(3) of the Internal Revenue Code and contributions shall be deductible by donors under section 170 of the Internal Revenue Code.
- Must file an IRS 990 or 990EZ.
- Must be a community-based organization operating in the area of Davidson's employees' residence.
- Services rendered by agency must be open to all members of the community regardless of race, religion, political affiliation, ability to pay, or background.
- Agencies intended use of Davidson grant monies and mission must be in-line with the Davidson Giving Grant mission.
- 100% of Davidson Giving Grant monies must be used in the area of Davidson Employee's residence.
- Agency must meet criteria set forth by Better Business Bureau Wise Giving Alliance Standards for Charity Accountability (see www.bbb.org for details of standards).
- International requests will be handled separately within the Foreign Corrupt Practices Act (FCPA) and in coordination with the host nation.

Ineligibility

- Non-profit without a current 501(c)(3) status
- Individuals
- Private Foundations
- Public or Private Educational Institutions
- Tax Supported Institutions
- Social Organizations/Committees
- Religious organizations without secular community designation (i.e. must provide services to people regardless of their religious beliefs. Example: A food bank that is a separate 501(c)(3) organization from a church that provides food to anyone who qualifies for services, regardless of religious belief.)
- Agencies that have received a Davidson Giving Grant in the past 24 months.



Application Instructions

- Applications for grants must be submitted on a Davidson application form. The forms must be complete and signed by an authorized official as well as the Board President or Chairperson of the applying organization. Additional information (brochures, letters, etc.) about the organization may be attached to the application.

Application Process

- Grant applications must be completed, signed and returned via email to comms@davidson-tech.com.
- Applications may be submitted at any time, but must be submitted before the deadline for a specific quarterly grant to be considered for that grant.
 - Q1 February 21, 2022
 - Q3 July 25, 2022
- All applications are subject to an initial screening for eligibility and to ensure required information has been submitted.
- Applying organizations should be prepared to receive a visit from a Davidson representative for the purpose of a “fact finding” interview.
- Applications will remain on file for six months from date of receipt.
- Organizations selected to receive a Davidson quarterly grant will be ineligible for additional consideration for twenty-four months from date grant is received. Please DO NOT re-apply prior to 24 month waiting period.



Application Checklist

Item	Comments	Check if included
Application Completed	All sections must be completed	
Application Signed	Must be signed by both an authorized official and Board President or Chairperson	
IRS Determination Letter	IRS determination that agency is non-profit 501(c)(3)	
IRS Form 990 or 990EZ and Schedule A	Submit latest year.	
Audited Financial Statements Or Unaudited Financial Statements	Audited financial is preferred however if audit has not been performed, please submit unaudited. Unaudited must include balance sheet and income statement	
Auditor's Management Letter	Required if audited financials are available	
Budget for Current Fiscal Year	Budget must be board approved	
Completed Web Page Form	Please make sure the description for use of grant money is clear and concise. This information is used to select winning agency.	



GRANT APPLICATION

Please make sure you complete Sections 1, 2, 3 and 4. Type or print in ink.

Section 1: Please complete all the following:

Date:

Agency Name:

Address:

Telephone:

Agency Website:

National Headquarters:

Agency Point of Contact

POC Name:

POC Phone:

POC Email:

If referred by Davidson employee, please provide employee name:

Information	Board President/Chairperson	Authorized Official
Name		
Address		
Telephone		

Note: Attachments may be used for questions requiring additional space.



1. Does the organization have a current 501(c)(3) status; and are contributions deductible by donors under section 170 of the Internal Revenue Code?
YES _____ NO _____ (If no please explain)
2. Is the organization a local affiliate of a national organization?
YES _____ NO _____
3. Is the organization managed, operated, controlled or affiliated with one of the following: religious, civic, political, tax supported, labor, fraternal or educational institution/organization?
YES _____ NO _____ (If yes please explain)
4. Are the services/benefits you provide in any way based upon a beneficiary's affiliation with any of the following: religious, civic, political, cultural, labor, fraternal or educational institution/organization?
YES _____ NO _____ (If yes please explain)
5. Does your organization charge for services provided?
 - A. Are services based on clients' ability to pay?
 - B. How are fees for services determined?
6. Please describe the purpose(s) and major program(s) of your organization. (You may attach literature, brochures along with description)
7. Please describe specifically how your organization would use Davidson grant monies including who, what, when, where, and why. A breakdown of costs is encouraged. The first 100 words should be the same description as provided in Section 4: Web Page Content Form. You may provide additional information in response to the question for clarification purposes, however, do not exceed the 100 word limit on web page content form.
8. If your organization receives a Davidson grant, what is the time frame or schedule for expenditure of these funds?
9. What region, location and/or client group will be served by the programs(s) for which this grant application is being submitted?
10. Will 100% of Davidson grant monies be used in region/location indicated in question 9? (i.e. does all money remain local)



11. If issued a Davidson grant, the organization will be required to provide, within 60 days after utilizing grant funds, a report describing the use of the funds, expenditure receipts, and any other information to illustrate funds usage. Photographs of utilization should be submitted; submission of such information implies permission for Davidson to use on website or other information sites. Is your organization willing to comply with this requirement?

YES _____ NO _____ (If no please explain)

12. Please provide names, addresses and telephone numbers of three individuals outside your organization who are knowledgeable of your program(s).

13. Please attach the following information:

A. Complete IRS determination letter.

B. IRS Form 990 or 990EZ and Schedule A for last fiscal year filed (Note: if last fiscal year has not been filed please provide copy of request for extension as well as the most recently filed IRS Form 990)

C. Financial Statements for last fiscal year: If available please provide audited financial statements for last fiscal year. If audited statement is not available, please provide reviewed or unaudited financial statements. Financial statements should include balance sheet, income statement and any other appropriate schedules required to complete Section 2 of this application.

D. Auditor's management letter (if one is issued)

E. Budget: Board approved budget for current fiscal year. Please identify any income sources that are not firm commitments.

F. Latest Annual Report – If not available please provide explanation.

Explanation for not providing Annual Report:

G. Complete Content Form.

All financial information will remain confidential within Davidson Giving Grant Review Committee.



Section 2: Please complete the following:

Davidson reviews each agency for eligibility using the BBB Wise Giving Alliance Standards for Charity Accountability (see www.bbb.org for details of standards). Please provide answers to the following questions:

Standard 1 - Board of Directors (BOD)	Yes / No	If no, please explain
BOD formally reviews the performance of the chief executive officer at least once every two years.		
BOD formally approves the budget		
BOD ensures that arrangements with outside fundraising firms are made in writing.		
BOD receives information (for example, a written summary) about the financial arrangements with such firms and, if applicable, the anticipated portion of the gross proceeds that goes to the charity.		
BOD has formally approved a conflict of interest policy and regularly monitors it to ensure adherence.		
BOD appoints a voting member of the board (e.g., treasurer, finance committee chair, or some similar title) to oversee the charity's finances and report to the board.		
BOD ensures that no person holds the offices of both chair and treasurer at the same time.		
BOD receives on an annual basis the charity's IRS Form 990.		
BOD receives on an annual basis, the charity's audited financial statement (if not available then an unaudited financial statement).		
BOD receives on an annual basis the auditor's management letter (if one is issued).		



Standards 2 and 4: Please provide information regarding Board members			
Member's Name	Member's Position	Voting or Non-Voting	Compensated or Uncompensated*

*Compensated includes the following:

- **directly compensated** voting members of the board are those who receive payments (cash and/or in-kind) from the organization (e.g., paid staff member, paid consultant, etc.)
- **indirectly compensated** voting members of the board are those who are direct family members (e.g., spouse, parent, sibling, and child) of any of the directly compensated individuals noted above
- voting members of the board who receive **honoraria** are considered to be directly compensated
- voting members of the board who receive only **reimbursements for expenses** incurred are not considered to be compensated
- voting members of the board who are **paid staff members of affiliated organizations** are considered to be directly compensated if, and only if, financial and governance relationships between the subject organization and the affiliated organization are such that generally accepted accounting principles (GAAP) require the affiliated organizations to have combined audited financial statements.

Standard 3: List of BOD meetings for the past fiscal year				
Date of Meeting:				
Number of Board members attending				

NOTE: The source of information for Standards 8, 9 and 10 should be the Audited/Reviewed or Unaudited Financial Statements. If information is not included on these statements, please refer to the IRS Form 990. Provide a copy of the source of information and below provide the associated page or line number from the source.



Standard 8:		
Item	Amount	Source of information/Page and Line Number*
Program Expenses		
Total Expenses		

Standard 9:		
Item	Amount	Source of information/Page and Line Number**
Total Fundraising Expenses		
Total Related Contributions **		

**Related contributions include donations, legacies, and other gifts received as a result of fund-raising efforts.

Standard 10:		
Item	Amount	Source of information/Page and Line Number**
Total Unrestricted Net Assets		
Total Expenses		

Section 3: Please provide appropriate signatures:

We certify that all information on this application is true and accurate and agree to comply with all requirements of this application.

Signature of Authorized Official

Date

Signature of Board President/Chairperson

Date



Section 4

Davidson Giving Grant – Content Form

This information will be presented to our Davidson employees who will be asked to vote on the charity of their choice.

The information provided on this form will not be used by the Davidson Review Committee to determine whether an agency qualifies for a grant. The Review Committee will only review this information to ensure it is suitable for presentation to the Davidson employees. If questions are redundant, please provide more details in the grant application and a brief summary on this form.

Organization Name: _____

Facility Location: _____

Mailing Address: _____

Agency POC- Name/Number: _____

Service Area(s): _____
Please specify by county

Agency Web Link: *http://* _____

If referred by Davidson employee, please provide employee name: _____

Mission Statement:

Describe specifically how the grant money will be used.

This information will be used in selection process (100 words maximum):

NOTE: Use same description as provided in question 7 of the application.

We reserve the right to edit or reject submissions that exceed the word count, contain typographical or grammatical errors, or are unsuitable for presentation.