

Request for Proposal

Funding Period:

January 1 – December 31
(calendar year following award issuance)

Contact information:

The Sea Otter Foundation & Trust
P.O. Box 351946
Westminster, CO 80035

Diane Tomecek, President

www.SeaOtterFoundationTrust.org
grants@SeaOtterFoundationTrust.org

303-475-1805

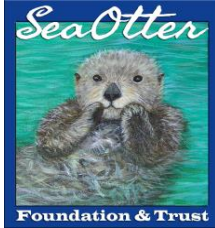
IMPORTANT NOTICE

In an effort to be environmentally conscious, applications **must be** submitted electronically as a PDF to the following e-mail address:
grants@SeaOtterFoundationTrust.org.

Please contact us with any questions, concerns or a desire to submit electronically via dropbox.

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Our mission: Ensuring the survival and recovery of sea otters (Enhydra lutris) in their habitats by building funds to support research, conservation and education.

Hello everyone!

Welcome to the Annual funding RFP for The Sea Otter Foundation & Trust (SOFT). We are excited and exceptionally honored to have you considering an application to our organization.

Some advisements regarding the process:

- The application is best filled out in Word as the text boxes can be resized to suit your need(s). Save as a PDF for electronic submittal. **All applications must be submitted electronically. Please note some important dates: the deadline for applications: October 1; notification of awardees: December 15.**
- The average grant amount is a **guideline for you**; we encourage larger requests up to a **maximum of \$5,000**. However, please be conscientious with your request; do not automatically apply for the maximum.
- For questions regarding direct vs. indirect costs, please refer to our Indirect Cost Policy on our website:
www.seaotterfoundationtrust.org/who-we-fund/
- SOFT's funding is based on the calendar year, so if your program or project is multi-year, please submit your request for needs within the funding period. Applications are due each year on October 1 (refer to Part VI, D); if you have a multi-year project, you need to re-apply each year.
- We encourage partnerships and collaboration, therefore we expect applicants to utilize financial resources wisely and not duplicate efforts (refer to Part V, D).
- SOFT requires a 6-month update report and a final 12-month final report (refer to Part VIII, Certification & Acceptance). Requirements & forms are provided with funding award.

The Sea Otter Foundation & Trust (SOFT) does not fund corporations (without an associated nonprofit 501(c)(3)), individuals (without the backing of a higher education institution), general operating costs (see also our indirect vs. direct cost policy) and fundraising or marketing initiatives.

We wish you the best of luck and look forward to reviewing your applications! Should you have any questions, please feel free to contact us.

Sincerely,

Diane Tomecek
President & CEO

Important Dates:

Application
Deadline:
October 1

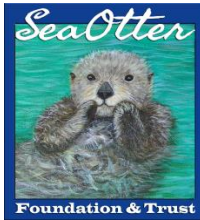
Grantees selected
& Notified:
December 15

Checks issued:
December 31

Follow-up Reporting Requirements

6-month
update report:
June 30

12-month
final report:
December 15



The Sea Otter Foundation & Trust Grant Application Form

PART I: CONTACT INFORMATION

Legal Name of Organization or Higher Education Institution seeking funding:

DBA (if applicable):

Mailing Address (and Physical Address if it is different and not confidential):

Phone:

Fax:

FEIN/EIN

Website:

Email Address:

**Name of CEO, University Advising Professor,
Exec Dir:**

Phone:

Email:

Applicant Contact Name (if different from above):

Title:

Course of Study (if applicable):

Phone:

Email:

PART II: ORGANIZATION INFORMATION

Nonprofit Organization/Higher Education Institution Information

Year Founded:

Mission Statement:

Vision Statement (if available):

PART III: TAX EXEMPTION/ELIGIBILITY INFORMATION

Tax Exemption Status:

- 501(c)(3) – **attach IRS certificate to application (nonprofit organizations)**
- Name of Fiscal Agent/Sponsor/Government Entity/University or College:

- If you are not a nonprofit organization [501(c)(3)] or Higher Education Applicant, please describe your current status or purpose in requesting funding from SOFT:

PART IV: GRANT REQUEST INFORMATION

- Average grant award: \$2,000; Maximum grant: \$5,000

(please be conscientious with your request - do not automatically apply for the maximum)

- We will not fund general operating expenses.
- At this time, if your project includes travel or staffing expenses, **please contact** Diane Tomecek, dianet@SeaOtterFoundationTrust.org or 303-475-1805.
- Additionally, please review & download our Indirect Cost Policy: www.seaotterfoundationtrust.org/who-we-fund/

Type of Grant Requested (select one):

Amount of Request:

\$

- Medical (Veterinary) Supplies or Other Equipment

Please specify:

- Program or Project Support

Name of Program or Project:

- Other

The Sea Otter Foundation & Trust has three funding priority areas – Research, Conservation & Education. Which of these applies to this project or program? Briefly describe:

- Research

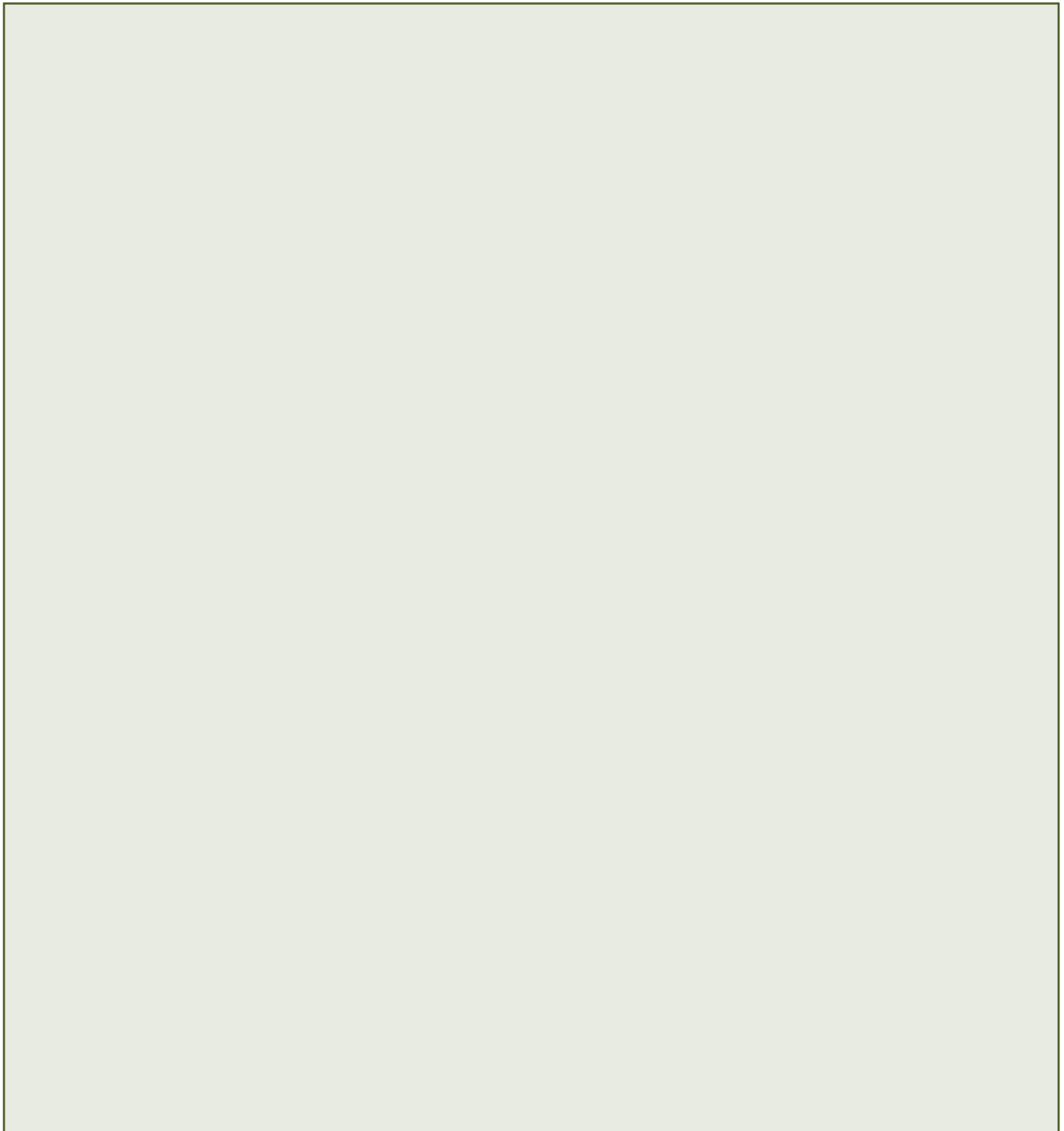
- Conservation

- Education

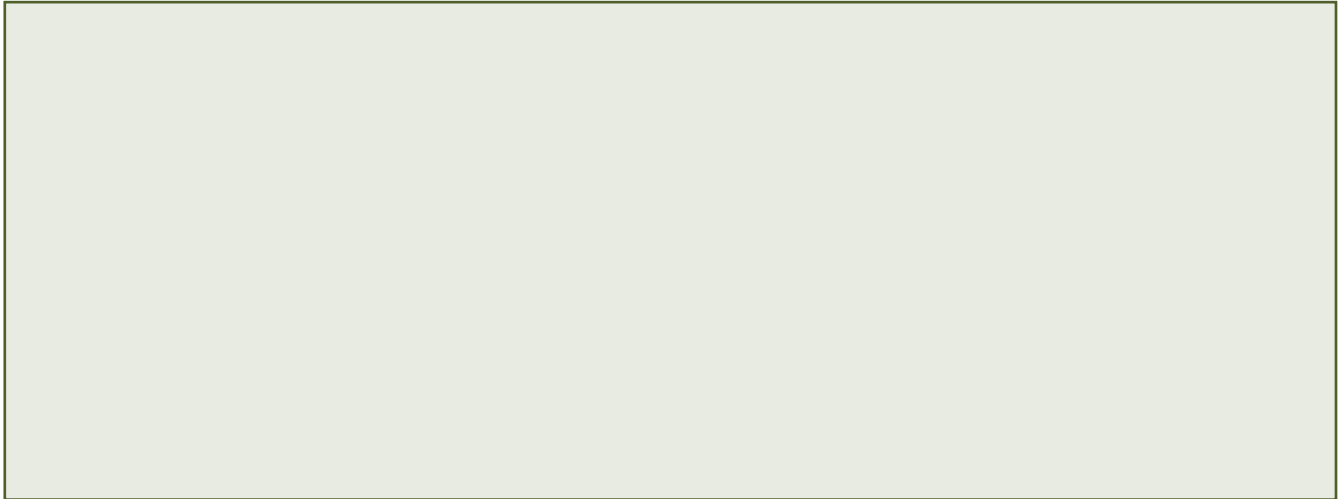
PART V: PROJECT/PROGRAM NARRATIVE

- A. Describe *in detail* your program/study/project as it relates to sea otter research, conservation & education. If this is a multi-year project, please attach an overall project summary in addition to the narrative for this specific funding grant:**

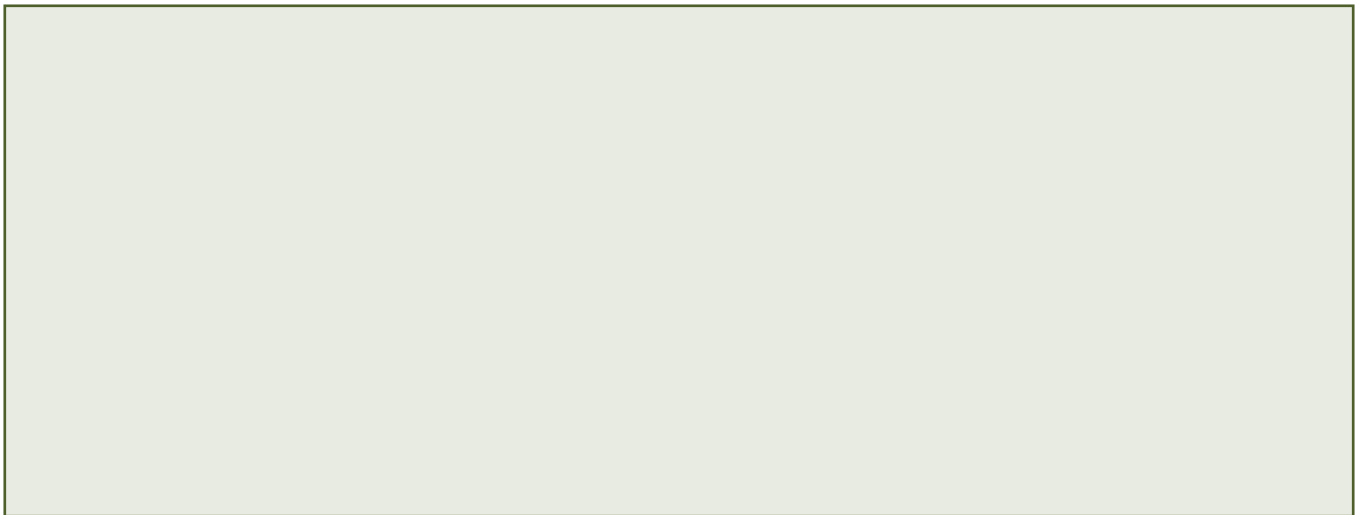
(Please expand text box for additional pages if necessary)



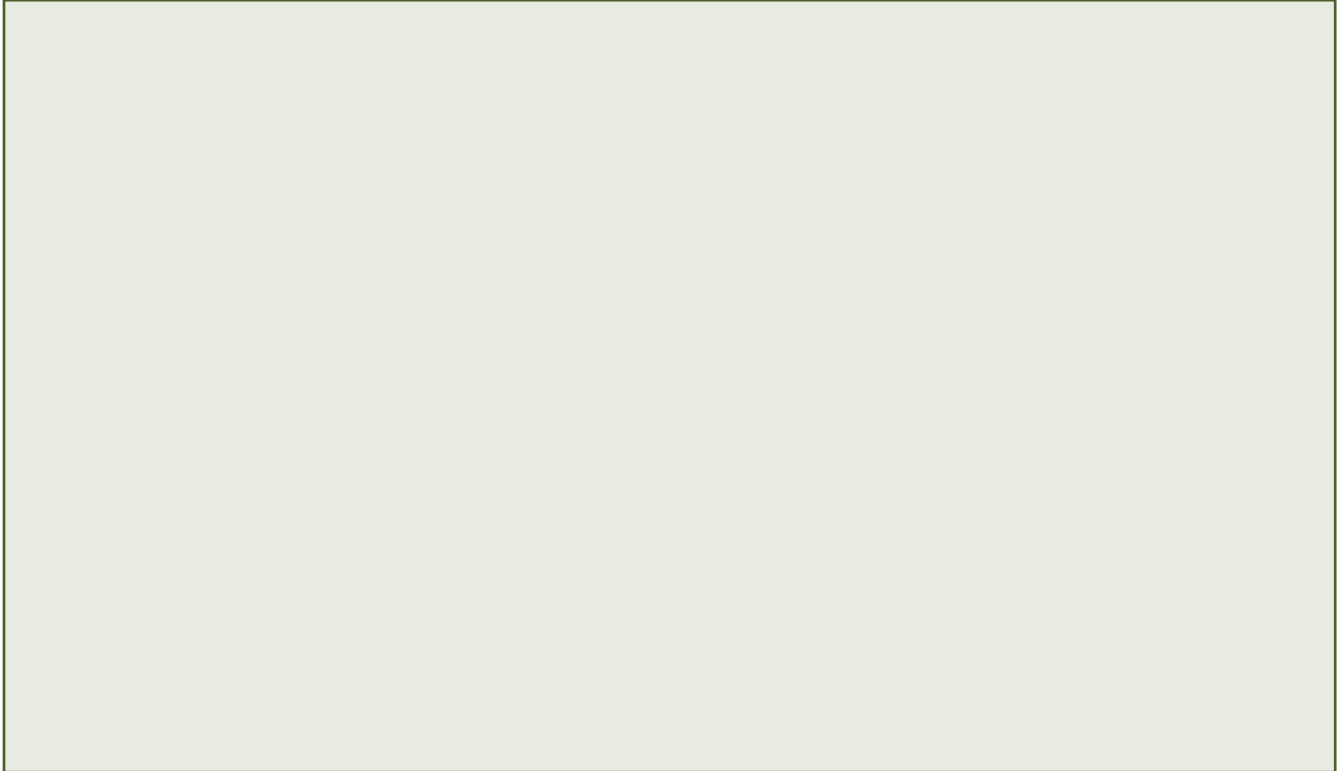
B. Describe your work (past & present) as it relates to sea otters:



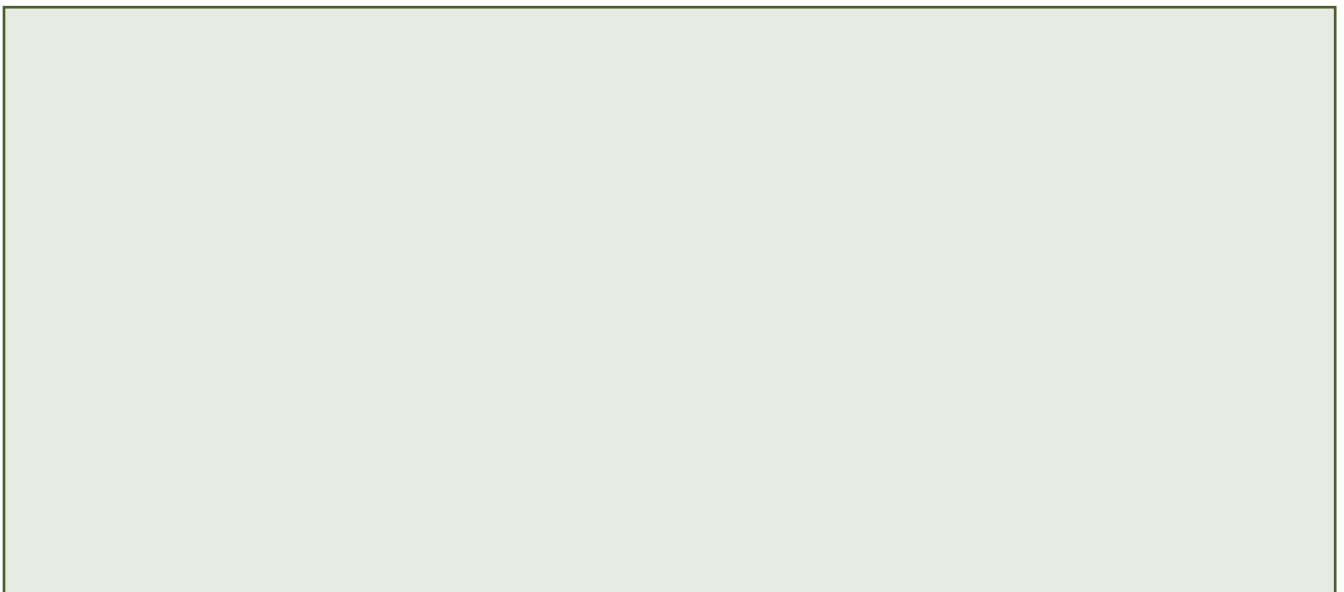
C. What *specific* Sea Otter Population is served through this project or program:



D. Are there other programs or organizations that have similar goals? Describe how you currently partner with them or will partner with them in the future:



E. What other sources of funding have been obtained or are being sought for this project or program:



PART VI: FINANCIAL INFORMATION

Nonprofit organization – complete Parts A - E

Higher Education Institution applicant – complete Parts B - E

A. Nonprofit Organization

Current Budget for Fiscal Year Ending:

Income: **Expenses:**

B. Program/Project Budget: **Dates: from:** **to:**

Income (anticipated or actual):

Anticipated Actual

Expenses (anticipated or actual):

Anticipated Actual

C. Amount of Grant Request (from PART IV above):

\$

**The Sea Otter Foundation & Trust distributes on an annual basis.
The funding period is the calendar year: January 1 – December 31.**

D. Is this a multi-year project? Do you anticipate additional funding requests?

E. Please attach a detailed budget for the project.

PART VII: CHECK PROCESSING INFORMATION

Legal Name of Institution for Grant Award Check:

Mailing Address of Institution for Grant Award Check:

PART VIII: CERTIFICATION & ACCEPTANCE

By signing below, I certify that the information contained in this application is true and correct to the best of my knowledge.

Additionally, I accept that if awarded funding, a 6-month project summary update and final 12-month project report for this funding period will be provided to The Sea Otter Foundation & Trust (SOFT) for use in SOFT's impact statements and/or SOFT's marketing materials. The Sea Otter Foundation & Trust will provide report forms and other necessary materials for follow-up reporting with funding awards.

CEO/Executive Director/Advising Professor

Date

Higher Education or Other Project Applicant

Date

The Sea Otter Foundation & Trust (SOFT) looks forward to working with you and/or your organization to *ensure the survival and recovery of sea otters in their habitats.*