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**GUIDELINES OF THE**  
**DR. LEON BROMBERG CHARITABLE TRUST FUND**

**GENERAL INFORMATION**

The Dr. Leon Bromberg Charitable Trust Fund was created by the Will of the late Dr. Leon Bromberg for charitable, educational and research purposes.

The Trust is governed by a Board of Trustees which determines the operating policies, acts on all business matters and takes action on all grant requests. The Trustees meet at least monthly.

**ELIGIBILITY REQUIREMENTS**

Grant awards are made to non-profit organizations who must present evidence of their exempt classification as set forth in the Tax Reform Act of 1969 in order to be eligible for a grant award.

**GRANT POLICIES**

The Dr. Leon Bromberg Charitable Trust Fund provides funding for charitable, educational and research purposes.

The Trust does not provide funds for routine operating costs, deficit financing, annual appeals, grants to individuals, private foundations, or for conduit organizations, i.e., to tax-exempt organizations which pass funds on to non-tax exempt organizations.

## FORMAT FOR GRANT APPLICATION

Grant applications should be in writing and addressed to the Dr. Leon Bromberg Charitable Trust Fund at the address shown below. Those applications determined to be consistent with the interests of the Trust as established by the Board of Trustees are investigated further and processed for consideration by the Trustees. The Board does not receive visitors or formal presentations during its meetings. Applicants are notified in writing of action taken on their requests.

A grant application should not be lengthy and only one copy of all material need be furnished. In order to assist in the preparation of the application and to facilitate its consideration and review, it is important that the following format be followed.

- I. A concise one-page statement summarizing the specific request.
- II. Information on **Organization** requesting funds:
  - A. Name, address and telephone number of organization and name of contact person for project
  - B. List of names and business affiliations of officers and directors
  - C. Brief history of organization
  - D. Purpose and goals of organization
  - E. Types of programs offered by organization
- III. Information on **Proposed Project for which funds are requested:**
  - A. Description of project
    1. Nature of project
    2. Specific need of project and purpose for acting on need at this time
    3. Goals and objectives of project
  - B. Plans for administration of proposed activity:
    1. Key staff personnel for project and their qualifications

2. Number of new personnel involved and disposition of new personnel upon completion of project
- C. Plans for operating project:
1. Timetable and/or schedule for implementing project
  2. Current status of project
- D. Plans for financing of project:
1. Specific amount being requested
  2. Other sources where request for project have been submitted or are pending
  3. Description of how project will be financed after initial funding expires

Some or all of the following information was previously provided on a prior successful grant application. The board, at its discretion, may again request updated versions of any or all of the following documents:

IV Support information pertaining to **Organization** requesting funds:

- A. Photocopy of latest IRS determination of tax-exempt status under Sections 501(c)(3) dated after January 1, 1970
- B. Statement on organization letterhead that there has been no change in purpose, character or method of operation subsequent to the issuance of the IRS ruling
- C. Most recent Return of Organizations Exempt From Income Tax, Form 990

V. The Trustees reserve the right, in their sole discretion, to require all or part of the following additional information:

- A. Current operating budget

- B. Projected operating budget for year(s)  
in which funding is requested (if available)
- C. Audited financial statement for most recent year
- D. Interim Financial Statement of income and expenses  
from time of last audit to present.
- E. Letters of support from key persons backing  
Project (optional)
- F. Any readily available printed materials, such  
as annual reports, pamphlets or catalogs.

Applications for grants should be forwarded to:

Judge C. G. Dibrell, III, Trustee  
Dr. Leon Bromberg Charitable Trust Fund  
2200 Market Street - Suite 710  
Galveston, Texas 77550

All applications for grants must be received in the office of the Dr. Leon Bromberg Charitable Trust Fund by the 10<sup>th</sup> of the current month in order to appear on the monthly Agenda.

Revised as of 11/01/04