



Independent Bank

Community Involvement

2015 Community Grants



Agenda

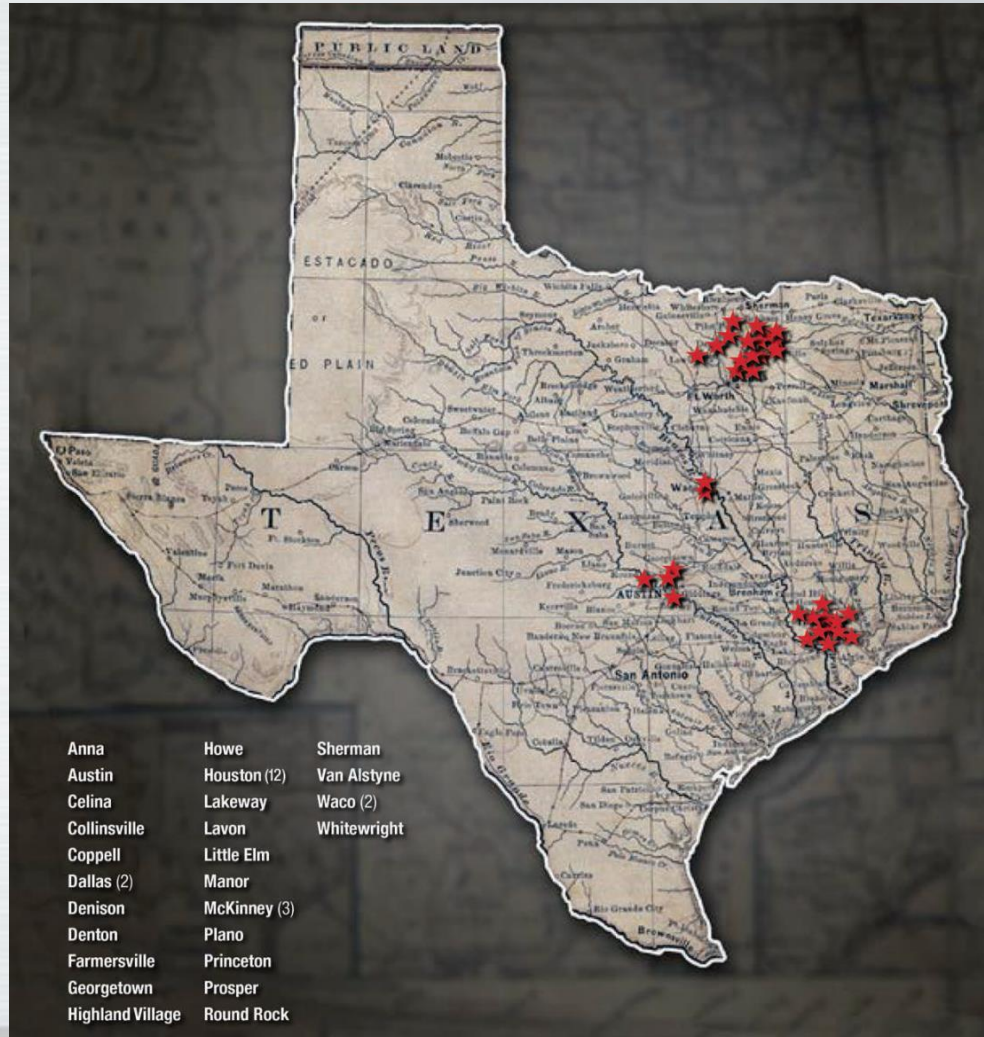
- Welcome
- Introduction
- Eligibility Requirements
- Application Format
- Evaluation Process and Criteria
- Questions



A New Approach to Giving



The Communities We Serve



Funding Priorities

- **Community Development** – We support organizations and programs working in low and moderate income communities that focus on small business development, affordable housing, and job training.
- **Education** – We support programs that promote academic achievement for low and moderate income students, facilitate merit based access to higher education for underrepresented groups, and provide training for teachers and administrators working with low and moderate income students.
- **Health and Human Services** - We support organizations that help ensure access to quality health education programs and health care in low and moderate income areas. We also fund basic needs assistance and child care service, especially when offered in tandem with other self-sufficiency initiatives.



Eligibility

- Organizations must have a 501(c)(3) tax-exempt designation from the Internal Revenue Service (dated within the last 10 years)
- Organizations must demonstrate fiscal and administrative stability
- Organizations must be located in and/or serve populations in the market areas of Independent Bank



The Fine Print (i.e. Limitations)

- Sponsorships, events or projects for which Independent Bank and/or its employees receive tangible benefits or privileges. This includes golf tournaments, tables at event and other fundraising activities that include tickets, meals or other benefits.
- Organizations that discriminate on the basis of race, gender, religion, ethnicity, sexual orientation or any other status or other classification protected by federal, state or local law.
- Religious organizations that are *not* engaged in a significant project that is nonsectarian and benefits a broad base of the community.
- Political action committees, political causes or candidates.



Types of Projects

- Through our Community Grants will invest in both the scaling of **proven ideas and the development of promising ideas** that are being implemented for the first time.
- We embrace and encourage **innovation, learning, and adaptation**; Especially when those efforts are rooted in a **sound and thoughtful approach** to serving our communities more effectively.
- We support programs that have **strong ties in our local communities**.
- Projects that **serve our communities** more efficiently and effectively, facilitate greater cooperation across programs, organizations and funding streams, scale best practices, and implement rigorous evaluation techniques.



Partnerships

Independent Bank encourages projects that will be completed in partnership, cooperation and consultation with other agencies.

Programs that demonstrate effective use of volunteers, as well as board diversity and involvement, are encouraged.



Process Recap

- **Step 1:** Is my project a fit with the funding priorities?
- **Step 2:** Is my organization eligible to apply?
- **Step 3:** Develop your project idea and submit a Letter of Inquiry (LOI)

Those submitting promising letters of inquiry will be contacted by Independent Bank and invited to submit a formal grant proposal.

Funding is not guaranteed if invited to submit a full proposal and no requests will be considered outside of this process.



How to Submit Your Letter of Inquiry

LOI's must be submitted electronically through the "Apply" link on IBTX.com.

Letter (Two pages max) should include:

- Name of your organization.
- Name, title and contact information for the person coordinating the grant application.
- A brief statement (two or three sentences) about the nature and purpose of the proposed project.
- A rough estimate of the cost of the proposed project and the amount of funds that the proposer is seeking from Independent Bank.
- The names, affiliations, and roles of any project partners, if any.



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Community Involvement

Founded on a higher purpose, Independent Bank pursues effective, sustained community involvement at all levels. To create the greatest possible impact, we leverage a powerful combination of local funding and volunteerism, both addressing the needs of the community and supporting the passion of our employees.

We provide support for organizations and activities that benefit communities served by Independent Bank through:

- Charitable Grants
- Sponsorships
- Employee Volunteer Programs
- Company Matching Donations



Community Grants Program Details

Independent Bank focuses its resources on the following three funding priorities:


Community Development – We support organizations and programs working in low and moderate income communities that focus on small business development, affordable housing, and job training.


Education – We support programs that promote academic achievement for low and moderate income students, facilitate merit based access to higher education for underrepresented groups, and provide training for teachers and administrators working with low and moderate income students.

Health and Human Services – We support organizations that help ensure access to quality health education programs and health care in low and moderate income areas. We also fund basic needs assistance and child care service, especially when offered in tandem with other self-sufficiency initiatives.

By focusing our resources we believe we can help create a ripple effect of positive change and economic stability in communities across Texas.

Make an Inquiry

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Community Grants

HOW TO APPLY FOR A COMMUNITY GRANT

STEP 1: DETERMINE FIT WITH FUNDING PRIORITIES

Priority will be given to funding projects and programs that closely align with the following funding priorities:

- Community Development – We support organizations and programs working in low and moderate income communities that focus on small business development, affordable housing, and job training.
- Education – We support programs that promote academic achievement for low and moderate income students, facilitate merit based access to higher education for underrepresented groups, and provide training for teachers and administrators working with low and moderate income students.
- Health and Human Services - We support organizations that help ensure access to quality health education programs and health care in low and moderate income areas. We also fund basic needs assistance and child care service, especially when offered in tandem with other self-sufficiency initiatives.



Independent Bank encourages projects that will be completed in partnership, cooperation and consultation with other agencies. Further, programs that demonstrate effective use of volunteers, as well as board diversity and involvement, are encouraged.

STEP 2: ELIGIBILITY REQUIREMENTS

- Organizations must have a 501(c)(3) tax-exempt designation from the Internal Revenue Service (dated within the last 10 years)
- Organizations must be located in and/or serve populations in the market areas of Independent Bank. [Click Here for Map](#)
- Organizations must demonstrate fiscal and administrative stability
- Please also see "Limitations on Grant Funding" listed below

STEP 3: LETTER OF INQUIRY

The next step is to submit letter of inquiry outlining your idea and inquiring about the possibility of funding. Guidelines for composing and submitting the letter are available [here](#). LOI's must be submitted electronically through the "Apply Now" link on the Independent Bank website. LOI's will be accepted starting December 1, 2014 and are due by December 31, 2014 at 10:00 AM.

Those submitting promising letters of inquiry will be contacted by Independent Bank and invited to submit a formal grant proposal. Please note that funding is not guaranteed if invited to submit a full proposal and no requests will be considered outside of this process.

IMPORTANT DATES



Register

Internet Explorer


shive.com/appform/login/ibloi2014

wizehive.com WizeHive

Letter of Inquiry

wizehive.com

tools Help



Independent Bank

If you are new to this application process, please Sign Up by entering your email address and password. You will then be taken to the application form. If you have already created an application, please Log In to review/edit your application or fill in other requested information.

LOGIN

Email

Password

[Forgot Password?](#)


SIGNUP

Email

Confirm Email

Password

Confirm Password

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Submitting the LOI

Inquiry - Windows Internet Explorer

https://app.wizehive.com/appform/display/lbloi2014

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Independent Bank Community Grants - Letters of Inquiry

Our Community Grant Application begins with a Letter of Inquiry (LOI). Staff will review and respond to all LOIs, usually within six weeks of the application deadline. Please do not submit a full proposal unless invited to do so.

Letters of inquiry must be submitted through this application portal. Required information for the LOI includes:

- A brief statement (two or three sentences) about the nature and purpose of the proposed project;
- A rough estimate of the cost of the proposed project and the amount of funds the proposer will be seeking from the Independent Bank;
- A rough estimate of the duration of the proposed project;
- Your title and contact information;
- The names and affiliations of other key members of the project, if any.

Letters of inquiry must be:

- No more than two pages
- Submitted electronically through this site.

*LOI's are due by December 31, 2014 at 10 AM.

Those submitting promising letters of inquiry will be contacted by Independent Bank and invited to submit a full grant proposal. Please note that funding is not guaranteed if invited to submit a full proposal and no requests will be considered outside of this process.

Ready to submit your LOI?

Please identify which community you serve *

- Dallas
- Sherman/Denison
- Houston
- Austin
- Waco
- ?

Please indicate the size of your organization *

- < 500K
- 501K-1M
- > 1M
- ?

Please attach your letter of inquiry here (max two pages) *

(maximum size 100MB) ?



Proposal Evaluation Criteria

- Does this project present an innovative approach to meeting challenges in our communities?
- Does the proposal include a fiscally sound development plan with emphasis on metrics, analysis and reporting?
- Does this project foster collaboration with other area nonprofit community partners?
- Are there opportunities for volunteer involvement by the Independent Bank Team?
- Does this project have the potential to broaden programs to reach additional geographic areas with the communities we serve?



Key Dates and Contacts

Grant applications open:
December 1, 2014 at 10:00 AM

LOIs due by:
December 31, 2014 at 10:00 AM

Please send questions to:
GRANTS@IBTX.com

