



ORANGE COUNTY COMMUNITY FOUNDATION, INC. 2012 Unrestricted Grant Cycle

TIMELINE AND CHECKLIST

Timeline:

Application Packets Available	9:00 AM on Monday, March 5, 2012
Application Deadline Date/Time	4:00 PM on Friday, April 6, 2012
Development Visits (if necessary)	As needed
Final Decisions Made	On or after April 26, 2012

Proposal Checklist:

Original Application and six (6) copies of:

- ◇ Grant application with required signatures and supporting documentation (narrative, implementation details, etc. as outlined on application).

One (1) copy (attached to the original grant application only) of the following:

- ◇ IRS tax-exempt determination letter
- ◇ Mission statement
- ◇ Annual operating budget (most recent and past two years)
- ◇ Board of Directors list
- ◇ Staff list and brief resumes
- ◇ Letter of support from financial or project partners
- ◇ Background materials related to the project/program

Send all requested materials by the application deadline specified above to:

**Cynthia Goerres, Program Manager
Orange County Community Foundation
112 West Water St.
Paoli, IN 47454
Phone: 812-723-4150**

Electronic copies may be emailed to: cyndigoerres@orangecountycommunityfoundation.org



ORANGE COUNTY COMMUNITY FOUNDATION, INC.

2012 Application for Grant Funding

Name of Organization _____		Date _____
Legal Mailing Address _____		City, State, Zip _____
Phone _____	Fax _____	
Federal Tax Identification Number (FEIN) _____		
Board President or Chair _____		Email _____
Project Contact Person _____		Email _____
Project Title _____		
Amount Requested _____		Total Projected Project Cost _____
Project Start Date _____		Projected Completion Date _____
<i>If project cannot be fully funded, would you consider a challenge grant? Yes/No</i>		

INSTRUCTIONS

On a separate page, provide the following information, numbered as below. Please refer to the Proposal Checklist included with this packet for a full list of requirements prior to submission of this application.

1. **Project Narrative:** Please provide a concise summary of the proposed project, indicating the community need being addressed, and why your organization is qualified to address this need. State your target population and the number of people it will serve. Include your organization's experience with similar projects and describe how the project fits into your organization's overall mission.
2. **Funding:** Describe how the foundation's grant funds would be used, as well as funding from any other sources. Include a detailed project budget, showing all projected costs and revenues for the project.
3. **Implementation:** Describe to us the means by which you will carry out your project, step by step. Explain how your organization has the capacity and resources to undertake and continue the project. Include the project timeline in this section.
4. **Evaluation:** Explain how you will evaluate the success of your project and the impact it has on the Orange County community. Will it enhance your organization's effectiveness or sustainability? How will you ensure the sustainability of the project itself?
5. **Other:** Tell us about other sources of income for your organization for the last two years, and the amounts and percentage of total income that were provided. Do members of your board support your organization financially? List other groups or organizations with which you are affiliated. If other groups or organizations are addressing the same issue(s) addressed by your project, what are you planning to do differently? Do you plan to coordinate efforts with them in addressing the issue(s)? If the foundation does not choose to fund this project, will you continue with it, anyway? And if so, how?

To the best of my knowledge and belief, all information in this application is true and correct. The document has been duly authorized by the governing body of the applicant. Applicant hereby certifies that it does not discriminate on the basis of race, national origin, religion, gender, gender preference, age, or disability ("non-discrimination factors") in its policies, practices, services, or standards for participation in its programs, except to the extent any program lawfully provides services to a limited segment of the population based on any such non-discrimination factor. It is expressly understood and agreed that Orange County Community Foundation is not a joint participant in, nor provider of, any of the Grant Applicant's programs or services. Orange County Community Foundation's role in Applicant's programs and services is limited solely to making grants and assuring that grants are administered in accordance with the terms of the approved application. The Applicant represents and warrants that it will use all granted funds in accordance with applicable laws. Applicant agrees to indemnify and hold Orange County Community Foundation harmless from any liability imposed on Orange County Community Foundation based on any conduct or omission occurring in connection with a program or service of the Applicant for which the Foundation has provided a grant.

Name of authorized representative	Title:	Telephone:
Signature of authorized representative		Date:



ORANGE COUNTY COMMUNITY FOUNDATION, INC.

Grant Criteria

CRITERIA

- Unrestricted grants will be made only to organizations whose programs benefit the residents of Orange County.
- Grant from Orange County Community Foundation must meet legal and tax requirements as to purpose and may be made only to non-profit organizations and government agencies. However, for-profit entities which apply will be considered if their project or program serves a charitable purpose.
- Grant recipients must show that their financial affairs are being properly administered and may be required to submit audited balance sheets and operating statements.
- No grants will be made to support political parties or political campaigns.
- No grants will be made specifically for sectarian religious purposes but can be made to religious organizations for general community programs.
- No grants will be made exclusively for endowment creation or debt reduction of the recipient organizations.
- The Foundation will not consider grant applications proposed by individuals or organizations responsible for advisory bodies or persons unless letters of recommendation or approval from said advisory bodies or persons accompany the grant proposals.
- Generally, grants will not be made for programs and/or equipment that were committed to prior to the grant application being submitted.
- Grantees must submit interim and final grant evaluation reports as requested by the Foundation. Failure to submit these reports may render the grant recipient ineligible for future grant awards. Failure to submit these reports represents a violation of the terms of agreement, and could result in withholding of grant funds or require that grant funds to be returned to the Foundation.
- Generally, if grant applicants are turned down for a specific grant application request, they may not re-apply for the same, or similar, request in the next grant cycle.



ORANGE COUNTY COMMUNITY FOUNDATION, INC.

Funding Categories and Priorities

CATEGORIES

- Arts and Cultural
- Civic and Historical
- Community Development
- Education
- Health and Human Services
- Recreation
- Youth

Grants that do the following are **HIGHER PRIORITY** Higher percentage of population reached

- Services Orange County as a whole
- Prevents rather than remediates
- Increases individual access to community resources
- Promotes independence
- Examines and addresses the underlying causes of local problems and issues
- Attracts volunteer resources and support
- Strengthens the non-profit sector
- Encourages collaboration among organizations
- Builds the capacity of the organization
- Offers services not already available in the community
- Creates new job(s)

Grants that do the following are **LOWER PRIORITY**

- Funds new or routine maintenance construction projects (except renovations of existing facilities that enable the organization to provide a better quality of service to Orange County)
- Funds annual giving or capital campaigns
- Funds normal operating expenses (except start-up expenses)
- Funds computer hardware equipment purchase
- Provides multi-year funding to organizations that have received an OCCF grant in the previous year. (However, the Grants Committee reserves the right to fund a program more than once within a year if committee members determine that the program is sufficiently beneficial to Orange County.)
- Organizations having an existing tax-base of support

The following are **absolutely not funded**

- Advocacy or political purposes
- Promotion of the teachings of a particular church, denomination or religion
- General group or individual travel expenses
- Debt, new or existing
- Individuals, except in conformance with the purposes of the Foundation as set forth in the Articles of Incorporation
- Re-granting (funds earmarked to grant to another organization)



ORANGE COUNTY COMMUNITY FOUNDATION, INC.

2012 Terms and Conditions for Grant Funding

Organization:

Amount Approved:

Purpose:

Duration:

1. Use of Grant Funds Grantee may use funds only for charitable purposes within the meaning of Section 170(c)(2)(B) of the Internal Revenue Service Code of 1954, as amended (the "Code"), and more specifically may use the grant funds only for the purpose outlined above. The Orange County Community Foundation has not earmarked the use of the funds or any portion thereof for any other organization or individual.

2. Payment of Grant Funds The grant funds will be paid by the Foundation contingent upon receipt of signed terms and conditions agreement.

3. Quality of Work Both the quality of work done and the progress made toward achieving the goals of the grant will be reviewed by the Foundation through periodic grant reports. Progress may be monitored by on-site visits by representatives of the Foundation. If the Foundation is not satisfied with the quality of the work or the progress toward achieving the goals of the grant, if the Foundation is of the opinion that the grantee is incapable of satisfactorily completing the work of the grant, or if the Foundation determines that continuation of the project for which the grant is being made is not reasonably in the interest of the people of Orange County, the Foundation may, in its discretion, declare the grant terminated and demand return of grant funds provided to the grantee. The Foundation's determination as to the quality of work being performed, the progress being made toward the goals of the grant, the grantee's ability to satisfactorily complete the work of the grant, and whether continuation of the work of the grant is in the interest of the people of Orange County will be final and will be binding and conclusive upon the grantee.

4. Certification and Maintenance of Exempt Organization Status The grantee certifies that it has been determined by the Internal Revenue Service to be a tax-exempt organization under Section 501(c)(3) of the Code, and not a private foundation, within the meaning of Code Section 509(a), or in the absence of such a determination, that the grantee is a state or political subdivision thereof within the meaning of Section 170(c)(1) of the Code, or an accredited college or university within the meaning of Section 511(a)(2)(B) of the Code (referred to hereafter as a "Public Charity"). The grantee will immediately inform the Foundation of any change in or challenge to its status as a Public Charity. The grantee will comply with provisions of the Code and the regulations hereunder applicable to the grantee as a Public Charity and will not violate any other statute or regulation applicable to the grantee where such violation materially affects the grantee's ability to carry out the goals of the grant.

5. Interim Reporting In addition to a final report as prescribed in paragraph 6, the grantee will also submit other such interim reports as the Foundation may reasonably request, and grantee personnel will confer with Foundation personnel or consultants at the reasonable request of the Foundation regarding expenditures, records and progress of the grant project.

6. Final Report On or before _____, the grantee will make a final report with respect to all expenditures made from grant funds and indicating the progress made toward the goals of the grant. Final report form will be provided to grantee, who agrees to answer all questions and include all information requested by the deadline stated.

7. Records Grantee will maintain books and records in such a manner that the receipts and expenditures of the grant funds will be shown separately on such books and records in a form that is easily checked. Grantee will keep records of receipts and expenditures of grant funds, as well as copies of the reports submitted to the Foundation and supporting documentation for at least four (4) years after the completion of the use of the grant funds, and will make such books, records and supporting documentation available to the Foundation for inspection at reasonable times from the time of grantee's acceptance of the grant monies through the duration of the grant period.

8. Acknowledgement of Support All manuscripts, papers, releases, exhibits or interviews prepared for meetings, the public or private press, magazines, periodicals, social media outlets, radio, television, or other means of communication dealing with the activities or achievements of the work of the grant shall acknowledge the Foundation's support.

9. Violation of Terms; Change in Status In the case of any violation by the grantee of the terms and conditions of the grant, including but not limited to not executing the work of the grant in substantial compliance with the proposal, or in the event of any change in or challenge by the Internal Revenue Service of the grantee's status as a Public Charity, the Foundation reserves the right in its absolute discretion to terminate the grant. The Foundation's determination will be final and will be binding and conclusive upon the grantee. If interim or final reports are not received by the Foundation from the grantee in a timely manner, the Foundation may terminate the grant and demand return of grant monies. Failure to submit required reports within the prescribed time limit may jeopardize the grantee's eligibility for future granting.

10. Termination Upon termination of this grant for any reason, the grantee will repay to the Foundation any portion of grant monies that were not spent for the grant project as proposed in the original grant application.

11. Future Funding The grantee acknowledges that the Foundation and its representatives have made no actual or implied promise of funding except for the amounts specified in this agreement. If any of the grant funds are returned or if the grant is rescinded, the grantee acknowledges that the Foundation will have no further obligation to the grantee in connection with this grant as a result of such return or rescission. However, the foregoing is not intended to prohibit the Foundation from providing the grantee an additional grant at the termination of the grant described in this agreement upon the submission of a new proposal, if the Foundation in its sole discretion determines that an additional grant is appropriate.

12. Modification This agreement sets forth all terms of the grant and replaces all prior understandings and agreements. Any modification or amendment will be made only in writing and signed by an authorized officer of the grantee organization and of the Foundation.

13. Applicable Law This agreement will be construed in accordance with the laws of the State of Indiana.

GRANTEE:

Name of Organization

Project Name

Check Payable to

Legal Mailing Address

Signature of Authorized Board of Directors Representative

Date _____

Signature of Project Director

Date _____

Approved by the Orange County Community Foundation Board of Directors

Date: _____

Signature of Board of Directors Representative:

Amount Approved: _____



ORANGE COUNTY COMMUNITY FOUNDATION, INC.

Interim Report of Grant Recipient

PLEASE NOTE: Failure to fill out and return this report in a timely manner may jeopardize the grant recipient's chances of being considered for future grant funding and may result in forfeiture/return of grant monies provided for this project.

Name of Organization _____ Date _____

Amount of Grant _____ Date of Authorization of Grant _____

Progress Report Due Date _____

Purpose of Grant: _____

Special Terms/Conditions of Grant _____

Please attach a brief narrative (3 pages or less) answering the following questions:

1. If there were special terms relating to your grant, describe the current status on meeting these terms.
2. How were the funds from this grant used? Please provide a project budget and/or receipts. If the entire grant has not yet been expended, please explain your plans for the unexpended amount.
3. Describe any unanticipated benefits or problems you have encountered with this project.
4. If the grant was for an ongoing program or activity, how will funding be secured for continuation?
5. Did this grant assist your organization in obtaining funds from other sources?
6. If you were to undertake this project again, would you do anything differently? If yes, please explain.

Send all requested materials by the final report date specified in your grant agreement to:

**Cynthia Goerres, Program Manager
Orange County Community Foundation
112 West Water St.
Paoli, IN 47454
Phone: 812-723-4150**

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ORANGE COUNTY COMMUNITY FOUNDATION, INC.

Final Report of Grant Recipient

PLEASE NOTE: Failure to fill out and return this report in a timely manner may jeopardize the grant recipient's chances of being considered for future grant funding and may result in forfeiture/return of grant monies provided for this project.

I. Narrative

Please provide 2-4 pages explaining the following:

- A. Brief description of the project
- B. The goals you set for the project to achieve during the duration of the grant received
- C. Progress and/or setbacks relative to the goals mentioned in part B
- D. How you measured the impact of your project on the Orange County Community, citing specific indicators of change and the time period over which they were measured

II. Financial Report

- A. Provide a complete list of all expenses for the duration of the grant period
- B. Attach all invoices, receipts, statements of expenses, or financial statements for the funding period

III. Attachments

- A. Publications such as news articles or other relevant materials about your organization and the funded project, indicating the Foundation's involvement in funding and the impact the project has had on the Orange County community

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