



Grant Guidelines

The Portland Foundation Women's Giving Circle

OUR MISSION:

The mission of The Portland Foundation Women's Giving Circle is to build a community of women philanthropists through the pooling of knowledge and resources for the purpose of providing grants to Jay County organizations and initiatives that address mutually-agreeable issues.

GRANT FOCUS FOR 2014:

During 2014, the Circle will make grants which focus on enhancing the capacity of Jay County's not-for-profit organizations to support programming that addresses needs for **Programs to Benefit the Elderly**. We wish to fund **innovative endeavors** that benefit Jay County residents of all ages – from toddlers to senior citizens.

WHO WE FUND:

The Women's Giving Circle makes grants to tax-exempt 501(c) organizations operating or proposing to operate programs for the benefit of Jay County residents.

THE FOLLOWING ARE EXCLUDED FROM CONSIDERATION:

- Organizations for religious or sectarian purposes
- Make-up of operating deficits, post-event or after-the-fact situations
- Endowment or capital projects and campaigns
- For any propaganda, political or otherwise, attempting to influence legislation or intervene in any political affairs or campaigns
- Dinner galas, advertising or other special fundraising events

HOW TO APPLY:

- Completed, computer-generated, application forms should be sent electronically to the Foundation Program Officer at jcook@portlandfoundation.org
- Applications that do not contain all of the requested information may not be considered. If requested information is not available, an explanation is required.
- Applicants are encouraged to contact Foundation staff with questions or if assistance is needed.

PROPOSALS SHOULD INCLUDE:

- **Completed TYPED application. Handwritten applications will not be accepted**
- **6 total copies**
- **Copy of IRS determination letter confirming 501 (c) tax-exempt status (if not already on file with the Foundation)**
- **Most recent financial statement, including budget and year-to-date income & expenses**
- **Board of Director's list**

SUBMITTING THE APPLICATION:

- Grant applications must be received via email to jcook@portlandfoundation.org on July 17, 2014 to be considered.
- For more information, contact Doug Inman, Executive Director at 260-726-4260

APPLICATION REVIEW:

- All applications are reviewed by Foundation staff for completeness and to insure they fit within the general guidelines.
- All applications are then reviewed by the Giving Circle Grant Evaluation Committee
- The Grant Evaluation Committee presents its recommendation to the Foundation Board of Trustees and the Giving Circle Executive Committee
- Final determination of grant awards is expected to be in mid-August 2014.

AWARDS:

The Women's Giving Circle anticipates that it will award grants in amounts from \$200 to \$1,000 during 2014. Awards for 2014 will be payable during the 2015 calendar year.

Grants will be awarded during the October circle meeting. If your organization/project is recommended for funding, we ask that a representative attend the meeting and be prepared with a short presentation about the organization/project.

EVALUATION:

All grantees will be expected to submit a written report when the funded project is completed or at the conclusion of the grant period. Guidelines for this report will be included with your grant award. You will not be eligible to receive another grant from the Women's Giving Circle until this evaluation is received.



The Portland Foundation Women's Giving Circle GRANT APPLICATION

GENERAL INFORMATION

Name of Organization:

Contact Person & Title:

Organization Mailing Address:

City, State, Zip:

Telephone:

Fax:

E-mail:

Tax exempt status and incorporation date:

Grant amount requested \$ _____ Total cost of project \$ _____

Percent of total project _____%

1) Brief statement summarizing the mission, objectives and history of the organization:

PROJECT INFORMATION:

2) Brief summary stating the purpose of the proposed project or program including the target population and need it will help meet.

3) Objectives of the project/program, expected outcomes and how the progress will be measured and evaluated.

4) Project/program timeline and/or the time period the grant will cover.

SUMMARY OF HOW THIS PROJECT WILL BE FINANCED

How the project money will be spent: Please attach purchase estimates and/or project bids.

Item	Amount	% of Total Project
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
Total Budget of Project	_____	100%

Source of Funds	Amount	Pending/Committed
<u>Your organization's contributions</u>	_____	_____
<u>Public contributions or donations</u>	_____	_____
<u>Loans</u>	_____	_____
<u>Other Sources (please specify)</u>	_____	_____
_____	_____	_____
<u>The Portland Foundation</u>	_____	<u>Pending</u>
_____	_____	_____
Total Budget of Project	_____	_____

In addition to completing the financial information requested, please attach your organization's most recent completed financial statements and the current annual budget, which also reflects year-to-date income and expenses.

Have you been refused any funding for this request? ___Yes ___No If yes, please explain.

5) If this is an ongoing project, how will it be funded in the future?
If this is a one-time purchase, how will maintenance of the purchased items, if applicable, be funded?

6) If the Women's Giving Circle is unable to grant your full request, will partial funding prevent completion of the project? What changes, if any, will be made to the project in the event of partial funding? Are there other potential sources of income?

FINANCIAL SUMMARY

Fiscal Year: _____ to _____

Checking Balance _____ Savings Balance _____

Total Endowments _____ CD/ Investment Balance _____

Explanation of any unusual expenses so far this year:

Approximately how many individual donors do you have on a yearly basis? _____

What percentage of your total income is in the form of individual contributions? _____

7) Identify person(s) staffing this project/program and their qualifications.

8) Plan to publicly acknowledge TPF Women's Giving Circle if awarded a grant.

To be signed by the organization's board president and by the individual to whom questions and correspondence may be addressed regarding this application:

Board President (or equivalent)	Date
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Contact person	Title	Date
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GRANT APPLICATION ATTACHMENTS: Please initial each item.

- Copy of IRS determination letter confirming the organization's 501 (c) tax-exempt status, if not already on file at the Foundation office
- Copy of the organization's most recent completed financial statement, including the organizational budget and year-to-date income & expenses
- Completed financial page of application including income & expenses for this project/program
- Board of Director's list identifying officers and members professional affiliations and length of terms
- Signature/date of Board President and project/program contact person
- Explanation why any of the above is not included