



The Community  
Foundation of  
Shelby County

Build Today...Dream For Tomorrow

# 2017 Grant Guidelines for community granting and field of interest funds

## About the Foundation

The Community Foundation of Shelby County is a 501(c)(3) charitable organization whose mission is to cultivate, administer and distribute legacy gifts for the benefit of our community.

Formed in 1952, the Foundation serves Shelby County (Ohio) and surrounding areas. Grant applications for our community granting and most field of interest funds are reviewed by the Foundation's Distribution Committee and forwarded to the Board of Trustees for final decision. The Louise Sheets Fund (for the Botkins area) is not part of this grant process and has its own guidelines and application available at [www.commfoun.com](http://www.commfoun.com).

Our restricted use funds (scholarships, donor advised, designated use, and organization funds) typically do not use this grant process. Grants from those funds are limited to the preferences stated in a will or written agreement from the donor or establishing organization.

## How Our Community Grants are Funded

People who through their wills or during their lifetimes create charitable funds usually determine the scope of charitable causes that may be supported by the fund. Sometimes the Foundation board is given broad discretion to award grants. These 'community granting' funds may have no granting restrictions or may name a field of interest preferred by the donor.

Currently, the Community Foundation has **The Community Impact Fund**, which enables the Board to have complete discretion over grants, and three 'field of interest' funds. **The Roscoe Beanblossom Fund** provides grants that support needy and worthy Shelby County youth. **The John Douglas Long Blind Fund** benefits Shelby County residents affected or afflicted by blindness or seriously impaired eyesight. **The Shelby County Medical Services Fund** supports medical needs.

Applicants do not need to address their requests to a specific fund. The Distribution committee will decide which fund can appropriately support a request. Requests that do not fit the parameters of a field of interest fund will be considered for granting from the Community Impact Fund.

## Funding Range

**Grants may be in any amount up to \$15,000. Requests in excess of \$5,000 are considered Impact Grants and will be viewed more stringently.**

**Impact Grants** will be evaluated as follows:

- The request must be specific. What equipment, event, programming, etc., is the grant being asked to support?
- An innovative, new concept or process
- Meets a need not fully met by existing programs
- Affects an underserved population
- Impacts a growing need in the community
- Is sustainable by the organization after the grant is exhausted
- Is not replacement of existing capital equipment
- Has sufficient data or statistics to verify the request.

Larger requests may require a site visit or presentation to the committee.

# Applying for a Grant

## The Grantmaking Process

The Foundation makes grants that touch various aspects of our community and the people served by its organizations. Successful grant proposals address a specific need of the organization and the people it serves. Other preferred elements are collaborating with other groups (if appropriate), avoiding duplication of services, and making an impact on as many people as possible. A list of funding limitations may be found on the last page of this document.

Governmental agencies and not-for-profit organizations designated 501(c)(3) by the Internal Revenue Service which are physically located in or serving Shelby County, Ohio and surrounding areas are eligible to apply for a grant. Consideration will be given to not-for-profit organizations that do not have a 501(c)(3) status, but are incorporated in the State of Ohio, so long as the grant proposal is for charitable purposes that fit within the Foundation guidelines and IRS regulations. Additional documentation will be required from organizations that do not have a 501(c)(3) status. If a fiscal agent (a 501(c)(3) or governmental entity) will be the payee to receive a grant, please list the entity's name and EIN on the Preliminary Proposal form.

### To apply for a grant, please follow these steps:

1. **Call or email the Executive Director** to discuss your grant request idea and whether your project appears to fit within the Foundation's guidelines. Preliminary Proposals and Full Proposals **will not be accepted** if they have not been requested by the Executive Director. Call (937) 497-7800, Monday-Friday between 9:00am and 4:00pm or email to [mspicer@commfoun.com](mailto:mspicer@commfoun.com).
2. Complete an online Preliminary Grant Proposal form **by February 1**. Printed forms will not be accepted. Find the online Preliminary Proposal at [www.commfoun.com](http://www.commfoun.com), in the Grants section of the Receive tab.
3. If our Distribution Committee would like to learn more about your project, you will be asked to submit a Full Proposal by **March 25**.
4. The Distribution Committee may ask for additional information, an interview or a site visit, if necessary.
5. **Final decisions** will be made by the Board of Trustees at their **April meeting** and applicants will be notified by mailed letter soon thereafter.

## Grant Terms

Most grant awards will be paid as follows:

**80% following board approval of a grant request.**

**20% upon submission of a favorable grant evaluation report** which follows the completion of the project or event or six months after the start up of a new program or organization. The Foundation may withhold any portion of the grant if the grantee organization deviates from the approved grant proposal or omits any requirements stipulated without prior consent of the Community Foundation. Some grants may be paid in installments or after conditions are satisfied. The Foundation will work with grantees to decide the appropriate timing of payments.

In general, The Community Foundation of Shelby County awards grants for one year. In selected instances, multi-year grants may be considered. An application seeking multi-year support must meet the following conditions:

1. Demonstrate that multi-year support is essential to the start-up of a new initiative.
2. Demonstrate that the effort will produce specific, measurable outcomes within the agreed-upon time period.
3. Agree to participate in a formal annual evaluation to document and measure the proposed outcomes.

## Evaluation

The Community Foundation evaluates grants in order to be a good steward of the money given by many generous people. Evaluations vary because of type of project and amount granted. An evaluation report form will be required from all organizations receiving a grant through this process. The Board of Trustees has the right to make exceptions to the funding timelines or grant terms.

## Limitations

There are restrictions on the scope of activities the Foundation is able to support. In general, The Community Foundation does not *typically* make grants from its discretionary funds for:

- General operating expenses of existing organizations
- Individuals
- Religious organizations for religious purposes (programs open to non-members may be accepted)
- Political organizations or political action committees for political purposes
- Endowments
- Specific scientific, medical or academic research
- Annual fund raising campaigns from existing organizations

To discuss your grant request please contact Marian Spicer, Executive Director, either by phone at (937) 497-7800 or email to [mspicer@commfoun.com](mailto:mspicer@commfoun.com). We are open Monday through Friday between 8:00 a.m. and 4:00 p.m.



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Visit us on the web and find electronic versions of the Preliminary Proposal at  
[www.commfoun.com](http://www.commfoun.com)