



COMMUNITY
FOUNDATION
of Middlesex County

Philanthropy • Leadership • Legacy

2017-2018 Competitive Grant Cycle Information Session

Thayer Talbott
Vice President, Programs and Operations

Tuesday, June 20, 2017
at Essex Public Library, Essex

Tuesday, June 13, Thursday, July 13, and
Wednesday, July 19, 2017
at CFMC

www.MiddlesexCountyCF.org



**COMMUNITY
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of Middlesex County

Housekeeping:

As of

2017, we have a new address: 49 Main Street

2012, we have a new logo and a new name

Community Foundation of Middlesex County

Please update your

- **Databases**
- **Websites**
- **New printed collateral materials**



COMMUNITY
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of Middlesex County

Our Mission

To improve the quality of life for the people of the County now and in the future by developing endowments, making grants that have impact, and assisting donors in meeting their philanthropic objectives



COMMUNITY
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2017 Board of Directors

Wallace C. Jones, *Chairman*

Nancy Fischbach, *Vice Chair*

Deborah Moore, *Vice Chair*

Clíodhna M. Coles, *Secretary*

David Director, *Treasurer*

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Vital Statistics (*as of 12/31/2016)

- 189 Funds
- \$13 Million in pooled assets
- \$179,830 in competitive grants in 2016-2017
- \$657,684 awarded in 2016
- 1,815 grants totaling more than \$5.4 Million to Nonprofit Organizations



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Grant Making Through the Community Foundation

- **Donor Advised Grants**

These Funds allow individuals, families, or businesses to recommend where the fund's dollars might do the most good, year in and year out

- **Designated Grants**

These Funds support specific nonprofits, communities, regions by creating a predictable and valuable revenue stream to further the mission, specific programs, or issues/needs

- **Agency Endowment Grants**

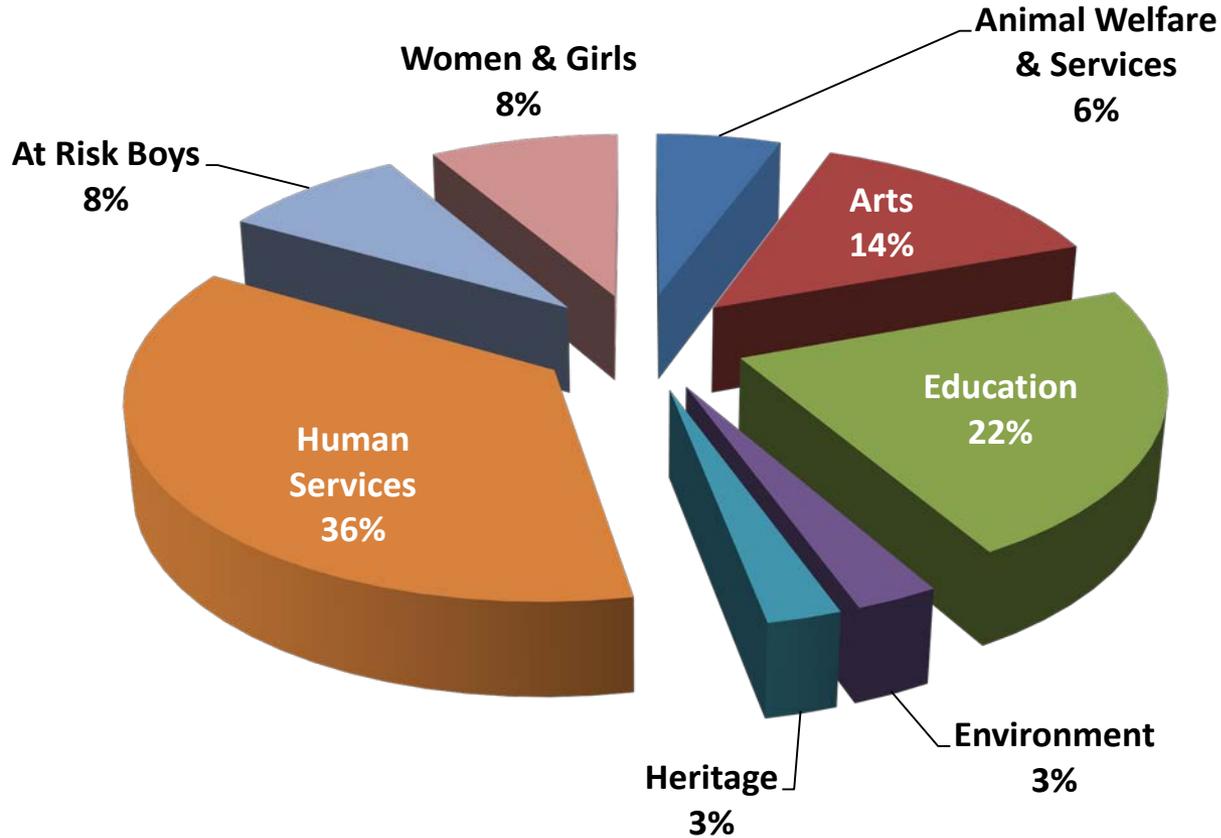
These Funds give your nonprofit an opportunity to safeguard your original investment, while building a stable funding stream for the future.

- **Competitive Grants**

Established by donors to support the Community Foundation competitive grant making program -- as of 2017, 60 Funds have been established.



2016-2017 Competitive Grant Funding

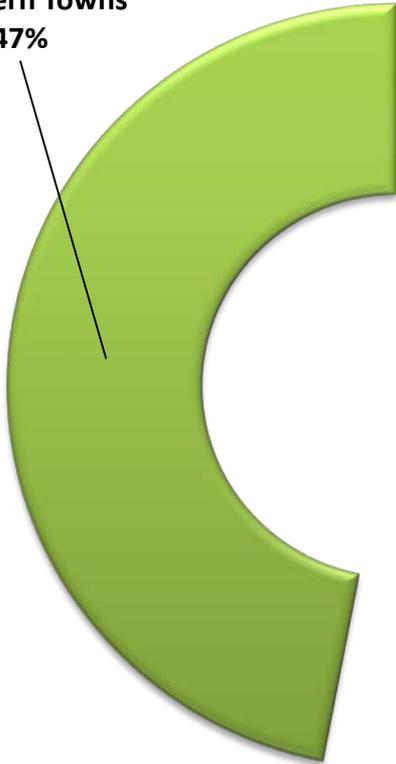


Total funding awarded \$179,830

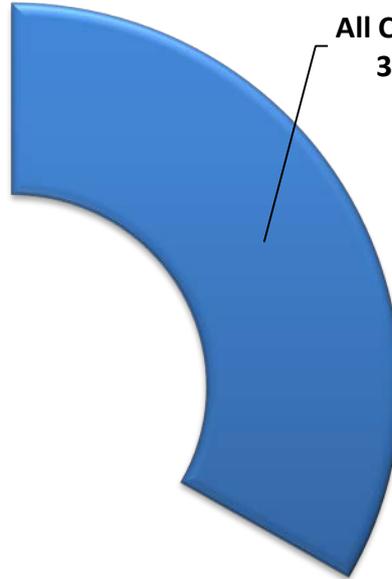


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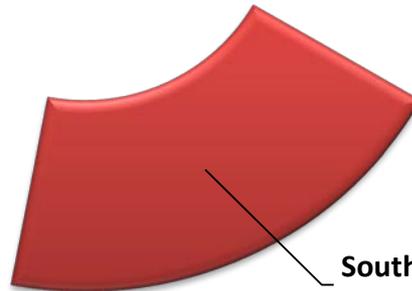
**Northern Towns
47%**



**All County
33%**



**Southern Towns
20%**



**by Region
where
program
occurs**



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The Foundation is particularly looking for grants that add value to, and have a positive impact on, the health and vitality of the Middlesex County community:

- Address a documented need or concern of the focus area;
- Recognize and build on a community's or organization's strengths and assets;
- Build the capacity of community organizations and/or individuals to help themselves over the long term;
- Foster cooperative approaches to community issues through collaborations based on shared visions and mutual responsibility; and
- Serve as a catalyst for attracting other resources, such as matching gifts; build infrastructure within the organization in order to meet its mission.

Normally, Grants are *not* awarded for:

- Endowments
- Building Programs
- Sponsorships
- Political organizations and campaigns
- Capital Campaigns
- Fund Debt Reduction
- Lobbying
- Individuals



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Focus Areas

Arts

Education

Environment

Heritage Enhancement

Human Services

Animal/Human Welfare & Resources

Programs for Women & Girls

Programs for At-Risk Boys & Young Men

Our Geographical Area - Middlesex County

Centerbrook, Chester, Clinton, Cobalt, Cromwell, Deep River, Durham, East Haddam, East Hampton, Essex, Haddam, Haddam Neck, Higganum, Ivoryton, Killingworth, Middle Haddam, Middlefield, Middletown, Moodus, Old Saybrook, Portland, Rockfall, Tylerville, Westbrook and Winthrop

★ *Organizations may be located outside of the county if the project serves the people who live and work in Middlesex County.*



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Focus Areas

Arts - enrich the county's quality of life with participatory and/or audience-oriented artistic activities. Grants may include, but are not limited to, special projects, productions or activities.

Education - to support opportunities both within and outside the formal education system to promote learning at any age, creating possibilities for self-sufficiency, personal growth and discovery, and better preparing our workforce for the future.

Environment - enhance, protect or increase appreciation for the quality of the environment, including botanical beautification, of a specific area, the Connecticut River Estuary, or the whole of Middlesex County.



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Focus Areas

Heritage Enhancement - increase public understanding of the rich heritage of communities in our county. Desirable projects would help the public develop a better sense of where we came from and broaden appreciation of our local stories and history.

Human Services - provide for basic human needs (food, clothing and shelter), and opportunities for self-improvement for persons in need. This may include financial assistance to programs that provide activities for children from low-income families and/or help adults become more productive, self-reliant members of society.

“Animal Welfare” (Animal/Human Welfare & Resources) - provide for the needs (food, health and shelter), services (training, rescue and adoption) and educational programs provided by organizations dedicated to helping animals and their human friends.



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Focus Areas

Programs for Women and Girls - that empower women and girls to be self-reliant and to reach their potential. Programs should be models in providing meaningful opportunities and services to women and girls.

Programs and Services of past grants have included:

Education

Issues of body image, self esteem

Programs and services for senior women

Domestic violence services

Programs for At-Risk Boys and Young Men - that help young men and boys reach their full potential

The Committee is interested in programs which focus on:

Education

Skill Development

Self-Respect / Self-Confidence

Enhance positive work and life experiences



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2017-2018 Competitive Application Cycle Key Points

- Applications are due **Thursday, September 14 by 4:00 p.m.**
- Average grant amount to remain the same – minimum grant \$500, average grant falls within the range of \$1,500 and \$3,200
- Collaborative Approaches are always encouraged
- Leverage additional resources
- Letter(s) of Support are **required** from superintendent(s) **and** principal(s) for school-based projects
- “3 Years Grant, 1 Year Off” Policy regarding application status continues
- Interim or Final evaluations are due **before** September 14
- Requirements for publicity / public relations efforts when awarded

Marketing Marketing Marketing Marketing



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Competitive Process

- One (1) Original and Sixteen (16) Copies
- Application Contact vs. Program Contact
 - Contact information will be requested for the individual completing the application and the individual in charge of the specific program or project.
- Adobe Form Fill will continue to be the application format of choice
- Submission deadline – September 14
- CFMC staff and volunteers will perform any requests for further information during late October
 - It is imperative that the listed application **contact** be available to respond to e-mail inquiries as most follow up questions will be sent to that individual's attention via e-mail.
- Final decisions - December



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Partnerships and Collaborations

School-based programs:

Nonprofits must have a letter from the Superintendent of the school district and the Principal of the school that includes:

- The school's understanding of the program
- If a partnership, what services, staffing, funding the school is providing
- If curriculum support, like a nature program, how the program supports the curriculum or adds to the curriculum which cannot otherwise be provided through the regular classroom plan

Part of the nonprofit narrative should include why the nonprofit is providing the programming to the school; for example the school does not have staff knowledgeable in the area or the program provides another level of curriculum enhancement to a subject being taught or the program provides curriculum not otherwise included in the school's general teachings.



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Partnerships and Collaborations

Two or more non-school based organizations:

One nonprofit must take the fiduciary lead and complete the application

Application must have a letter from the other nonprofit(s) that includes:

- The organization's understanding of the program and commitment to the funding process
- What services, staffing, funding the organization(s) is providing

How long has the partnership been in existence:

- Is it new or on-going?
- Is it one-time or will it continue?

Be clear about the organizational relationship – partnership, collaboration, service provider



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Grant Proposal Tips

- Follow the directions – Read the instructions – then read them again
- **One Program Per Application – One Application Per Organization**
- Narrative sections will be restricted to specific character/word counts – draft in Microsoft Word and use “Character/Word Count” to verify before pasting
- Make it easy to read – be specific and focus on your Program/Need, Purpose and Goals
- Peer Review & Independent Proofread
- Collate and Staple Submissions – include only those documents requested
 - Copies may be submitted copied front-to-back
 - Please do not include collateral unless requested (brochures, endorsements, etc)
- Meet the deadline – submit early if proposals are ready



Grant Proposal Tips

- Synopsis – Short program name/description
 - “Create a traveling exhibit and educational program emphasizing good nutrition habits ...”
 - “Obtain and launch new donor software which will allow the organization to streamline donor services, cultivate a broader donor base, and upgrade the organization’s technological infrastructure ...”

Application	Contact	Prerequisites	Payment Plan	Notes	Conditions	Processes
ID Code:	<input type="text"/>		Grant Num.:	20110044		
Grant Amount:	<input type="text" value="0.00"/>	Requested Amt:	<input type="text" value="0.00"/>	Batch:	<input type="text"/>	
Grant Date:	<input type="text"/>	Date Received:	<input type="text" value="08/08/2011"/>	Status:	<input type="text"/>	
Action:	<input type="text" value="Open"/>	<input type="checkbox"/> On Hold	Status Date:	<input type="text"/>		
Fund ID:	<input type="text"/>		Officer:	<input type="text"/>		
Program Name:	<input type="text"/>					
<input type="radio"/> Description <input type="radio"/> General Coding <input type="radio"/> Population <input type="radio"/> Additional Detail <input type="radio"/> IRS Data <input type="radio"/> Other						



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Grant Proposal Tips

- Include **one copy** of the 501(c)3 or verification of tax exempt, not-for-profit status under charter
 - This is required even if you have applied in the past
- Audit & 990 – Please do **not** submit this with your application. However, you may be contacted for a copy during the due diligence process. We will not request a paper copy; rather you will be able to submit an electronic copy
- Geographic and Population Information - **IN MIDDLESEX COUNTY**
 - Total Number Served By Program/Request
 - Geographic Areas Served by this grant
 - Please choose only those served so that an accurate assessment of impact and services can be determined
- Board Information:
 - Contributing Percentage – Financial commitment to the organization’s operations. This does not include hours volunteered
 - Affiliations – professional (who do/did they work for – if s/he didn’t work, community advocate/volunteer)



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Grant Proposal Tips

- Draft your narrative statement ... then throw out the first few paragraphs
- You are introduced to someone who mentions, “I have \$2,000 and I am looking for something wonderful to fund ...” – you have 3 minutes, how will you describe your program?
- Use bullet points where appropriate and ask yourself these questions:
 - What are we doing
 - Why are we doing it
 - Who will it help / benefit
 - How long will it take
 - How much will it cost
 - When are we doing it
 - Where is the footprint
 - Can we quantify the “who”
 - What are the outcomes we expect



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Grant Proposal Tips

Application Fill-In Blanks and Narratives

- **Calculating Impact** – this is *not* the organization’s membership, IRS census number, the town population, the regional population. This is a best estimate of the actual number of people the program will impact, touch or otherwise influence.
- If you use **acronyms** in your narrative – the first time, state what the acronym represents
- If you say “we have a **significant number of volunteers** who ...” – how many? Are they all involved in the single program you are applying to support? Why is it important to state that?
- If the program for which you are applying is **part of a larger initiative** – for example your application is for School A but the overall program includes six schools – be clear about the number of all entities involved in the broader program as well as the specifics of why you are requesting support for a portion of the program at this single entity.
- **Program participants** – how are they selected or cultivated from the community or an organization or school or area?



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Grant Proposal Tips

Budget

- Organization's Operating Budget:
 - If the applicant is a division/department of a larger organization, for example Middlesex Hospital or Wesleyan University, then the overall Operating budget should be for the specific division/department (not the full organization) and footnote what percentage of the full operating budget is allocated to the division
 - If the applicant is division/department of a larger organization, a footnote on the budget should provide a short explanation of fundraising: does the organization perform fundraising on the division's behalf for programs? Is the division/department expected to raise funds for programs outside of general operating expenses?
 - If the organization's operating budget includes line items for endowment drawdowns and/or distributions, please include a footnote explaining if this is an annual required distribution of interest/dividends or if this a special funds drawdown from principal.



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New in 2017 – Program/Project Budget Form

Program/Project Budget

- Program/Project Budget must be submitted on the new required form
- Itemized budget of income and expenses of the **program/project**, including the amount raised or expected from other sources.
- If salaries are included, provide an explanatory note of what percentage of the staff person's time is expended to the program and if there is a reduction in the general salary line if the program is not funded.
- If the project is ongoing, provide an explanation of how it will be funded in the future.
- Funding sources (including any grant requests pending and to be submitted) must be included. Provide footnote explanation of what will happen to the program if not all funding is procured (will the program be continued as presented, modified, or will it not go forward).



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Program/Project Budget - Do's and Don'ts

- **Itemize** – and be clear about the line items. “Program Support Costs” is not an item on its own.
- **Financial Support** – otherwise known as financial assistance or fee supplement: include what the usual fees are, how many individuals the requested funding will support, and the total allocated fee assistance budget with total number supported.
- **Projected Deficit** – explain with a note; for example, if the organization is still identifying possible funding sources, and the organization is committed to finding them, but the income shows a current projected deficit – explain how this will be balanced and/or if the program will be modified.
- **CFMC is the only funder listed under income** – why? Provide an explanatory note.
- **Cross-check your budget numbers and your application numbers**
- **Volunteer Donated Hours** are not a program cost – please do not calculate them into the hard costs
- **Keep Hard Costs Separate from In-Kind Costs** – your program budget should calculate the actual costs of the program. You may create a separate section to list any in-kind services which help keep the costs of the program low.
 - Examples of what is not an in-kind cost includes hours worked by your volunteers, staff salary costs of your staff, or “facility” fees of space owned/operated by your organization
 - Include a “Total Program Budget Cost Hard/InKind” at the bottom of your Budget page



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Navigating Our Website

- Grants Program overview
- Grant Making Timeline
- Forms & PR Guidelines

The application will be cross-linked throughout and will be posted on the “Forms & PR Guidelines” Page

860.347.0025 • 211 South Main Street Middletown, CT 06457 • [Email Us](#) [Home](#) [About](#) [News & Events](#) [Contact](#) (o) [Your Gifts](#)

COMMUNITY FOUNDATION of Middlesex County

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Ways To Give ▾ Planned Giving ▾ Advisors ▾ Non-Profits ▾

Faces of Philanthropy

Funded by an anonymous donor and produced by Outthink of Essex, this video gets to the heart of Philanthropy – Pure & Simple, focusing on the many ways individuals, businesses and organizations can work together improve the quality of life in our community.

[Watch the Video »](#)

Grants

- Grants Program
- Recent Grants
- Grant Making Timeline

Resources

- Forms & PR Guidelines
- Guidelines

Matt Pugliese
Executive Director
Oddfellows Playhouse Youth Theater

The Community Foundation | What Can I Do? | Creating a Fund | I Am A Non-Profit

www.MiddlesexCountyCF.org



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Marketing and Publicity

Grant Awards are expected to be publicized

CFMC has a Communications Kit – available on our website and by e-mail

Links to news articles, website publicity, and stories should be forwarded to CFMC

Links to Facebook announcements and posts should be made with the Community Foundation's Facebook page - www.facebook.com/CommunityFoundationMC



Program/Project stories should be forwarded to CFMC

CFMC's logo should be included on website partner/resource pages with a link to the Community Foundation's website



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Evaluations

Prior approved grants are not considered completed until a final evaluation has been submitted

Incomplete or missing evaluations will affect future funding considerations

Provide Final Evaluations From Previous Grants

before September 14, 2017

**For 2016-2017 Cycle Grants, an interim status report should be submitted if the project or program has not been completed by September 10, 2017.*



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Evaluations

Evaluation forms are available on the Community Foundation’s website under Nonprofit Resources and by e-mail.

Evaluations should **detail** program goals and objectives as well as outcomes – quantitative and qualitative.

Evaluations should contain complete descriptions of the actual program, who attended, what was accomplished, who was impacted, etc.

They should not be a single sentence or two sentences for each question in length and considered complete.

Evaluations should include photographs and, when possible, a short narrative statement that may be used in Community Foundation news stories, website postings, and Facebook postings.

Photos submitted may be used publically – on the website, in newsletters and the annual report, in advertising, and other collateral material. The organization should have a “Photo Release” form on file for any photo sent to CFMC.

Evaluations must include a complete and accurate, line-item program budget, including other funding sources and funding allocations.



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2017-2018 Competitive Cycle Timeline

- Monday, July 17 Competitive Grants Cycle Opens with Application Form
 - This will be available on our website, www.MiddlesexCountyCF.org and via an e-announcement
- Thursday, September 14 **4:00 PM** Applications are due in CFMC Offices
 - Applications may be dropped off in person or mailed; all applications must be **IN** our offices by 4 p.m.
 - Interim or Final evaluations from previous grants are due **before Sept. 14**
- October and November If further information is requested by the Grants Committee, you will be notified by staff
- Wednesday, Dec. 13 Board Reviews Grants Committee Recommendations
- Thursday, Dec. 29 Notification Letters mailed to Organizations



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www.facebook.com/CommunityFoundationMC

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