



TIPTON COUNTY
—FOUNDATION—

Tipton County Foundation Grantmaking Policies & Procedures 2021 Edition

This document may also be found at www.tiptoncf.org/grants

Proposals Welcome

Statements of Intent (SOI) are welcome, year-round, from groups engaged in charitable projects. Statements of intent should be submitted at least two weeks before the target grant deadline, to allow adequate time to construct a full proposal.

Please visit www.tiptoncf.org/grants to create your online account and start your Statement of Intent.

After receipt of your statement of intent, TCF staff will contact you to submit a full proposal, as outlined in this document. A full grant proposal includes such detailed information as budgets, financial statements, organizational assessments, and planning documents, and is much more in-depth than your statement of intent. The submission of this document starts the official review of your request, which will include a follow up visit or call from the grantmaking committee and will eventually be approved or declined by the TCF Board of Directors.

These procedures are available on our website at www.tiptoncf.org/grants.

Annual Grants Program Policies & Procedures

The Tipton County Foundation, Inc. is a tax-exempt public charity governed by a volunteer Board of Directors broadly representative of Tipton County. The Foundation holds a variety of funds that make grants to a broad range of charitable agencies and programs. The following grant program policies and procedures apply only to foundation grantmaking funds, and not those for which donors have directed the use of a particular fund to a specific charitable purpose.

Please note that only nonprofit charitable programs and projects that serve the Tipton County community are considered for funding.

TCF's Annual Competitive Grants Programs may change at any time. Potential grant seekers are encouraged to contact the Foundation prior to submitting a proposal to be certain the project qualifies for funding.

Preference will be given to proposals that:

- Address priority community concerns
- Are change-oriented or problem-solving in nature
- Assist grant recipients to achieve certain objectives that are measurable
- Have a transformational impact on their clientele
- Will have the greatest benefit per dollar granted
- Have the potential of leveraging additional grants from other sources

Groups are only eligible to receive grants if:

- They are nonprofit or charitable (including formal, informal, governmental, and *ad hoc*).
- They document their responsible fiscal management and adequate accounting procedures. *These include a specific fundraising plan and current strategic plan.*

The Foundation does not make grants to individuals or for the following:

- Political purposes
- Programs or equipment purchased before the grant proposal was initiated, for which the organization now seeks reimbursement
- Debt reduction, except in cases where it is determined that operating dollars should be granted to allow an organization to focus their own discretionary funds on debt
- Annual appeals or membership contributions
- Building of Endowments, except in cases where it is determined that operating dollars should be granted to allow an organization to focus their own discretionary funds on building their endowment at TCF.
- Projects that benefit too few persons to reasonably be considered charitable by the IRS
- Travel expenses for individuals or groups, not to be confused with transportation, which may be an element of a proposed program
- Past Grantees who are delinquent in reporting on a previous grant.

Decision-making Process

A committee of community volunteers and members of the Foundation's Board of Directors evaluates each proposal. Members are selected to represent the broad geographic and professional diversity of the Tipton County community. The Board of Directors makes every effort to appoint committee members who will be unbiased and fair in evaluating proposals. The committee is made up of ten to twenty diverse and representative Tipton County citizens and chaired by a member of the Foundation Board.

Committee members visit with proposers, often at their facilities or location where a project or program will occur, and may contact others familiar with the organization and the need that the proposal addresses. The proposers do not present to the full committee at its quarterly meeting.

The Board approves the budget for the grantmaking committee yearly, out of the proceeds from the Foundation's general endowment and field of interest funds. The committee chair reports to the Board those proposals that have been approved for the Board to review. Additionally, the grantmaking committee may postpone a decision on a proposal or decline to recommend funding.

Evaluation

In evaluating grant proposals, the Foundation gives consideration to:

- **Community Impact:** number of people affected, demonstrated community need or desire for the project, collaboration with other organizations, volunteer commitment to the project.
- **Foundation Resources:** can the Foundation adequately and effectively respond to the request in the context of grantmaking priorities and budget?
- **Project Quality:** established community need, expected benefits, planning, similarity to other programs, reasonableness of budget and grant request, other expected funding sources, potential to leverage other grants. See Fundraising & Strategic Planning, below.
- **Project Management:** staff and Board experience, organizational ability to carry out the project, mission-appropriate, long-range plan for the project and the organization, future of the organization. See Fundraising & Strategic Planning, below.
- **The Annual Fundraising Plan:** There is a written asset development plan indicating long-term goals, immediate action steps, and measurable outcomes, as a part of the overall strategic plan. The TCF grant proposal includes strategies and tactics to support new donor cultivation, to strengthen relationships with existing donors, and to encourage future giving.
- **The Strategic Plan:** The grantee organization's vision, values, and beliefs are clearly defined and guide the planning process. The plan addresses all aspects of the organization, including fund development, community leadership, stewardship, and programs. Goals and objectives are Specific, Measurable, Attainable, Realistic, and Timely (SMART)

Submitting a Proposal

Step One (the statement of intent)

If you are interested in submitting a grant proposal to the Tipton County Foundation, the first step is to complete a Statement of Intent at www.tiptoncf.org/grants.

The Tipton County Foundation uses the *Foundant* online grant management system for all SOIs and applications. If it is your first time applying for a grant, you will be asked to create an account for your organization with up to date contact information. The system is secure, and tutorials are available every step of the way.

Statements of Intent are reviewed as they are received, and applicants can expect to hear back about next steps within a week of submission.

Step Two (narrative)

After we respond to your SOI, you will be directed back to the online system, where you can login and complete the remainder of the proposal, which will now be available to you. The full proposal will include the following.

Rationale

In this section, you will incorporate the information from your SOI with any appropriate updates. This is where you should explain in detail: the *need* for your project, *how* the project will be implemented, and how the success of the project will be *measured*.

Collaboration

Please tell the committee *who else is involved* in this kind of project in or for Tipton County, how their work is *similar or different* from the project you are proposing, and what other agencies/organizations are *likely to work with you* in fulfilling your plan.

Organizational Strength (and weaknesses)

Here you will analyze the *internal and external strengths and weaknesses* that your organization might face. In addition, you will need to include...

- The Annual Fundraising Plan

A written asset development plan indicating strategies and tactics to support *new donor cultivation*, and to strengthen *relationships with existing donors* and to encourage *future giving*.

- A Strategic Plan

Include a copy of your written multi-year plan that addresses all aspects of the organization. If you do not have a written plan, identify in detail the goals and objectives of your organization and how they are being addressed. Be specific about actions you are taking and how this grant assists in the mission.

Step Three (attachments)

In your application, you will be asked to upload following documents.

1. List of Board members and identification of Board officers
2. Statement of Financial Position (Balance Sheet) for both year-end and most recent period
3. Statement of Activities (Income Statement) for both year-end and most recent period
4. Organization budget, including planned fundraisers (month to be held, and net dollars anticipated)
5. Detailed project budget

Itemized income and expenses. Indicate whether revenue is pending or received, and whether it is in-kind revenue or cash.

Please indicate the portion of the project budget you are asking TCF to fund, whether it is a specific item in the budget or a percentage of the total. Your project budget may include an appropriate portion of your organization's administrative expenses. For example, if staff is needed for oversight of the project, the corresponding portion of his/her salary and benefits could be allocated to this project budget.

6. Evidence that this proposal has the approval of your Board of Directors or governing body. (a signed letter, email correspondence, meeting minutes, etc.)