



*Unity Foundation of LaPorte County*

*A Power For Good*

P.O. Box 527

Michigan City, IN 46361

**To Organizations Requesting Community Fund Grants:**

Thank you for your interest in grant funds from the Unity Foundation of LaPorte County. You will find information in this packet describing what is required from your organization to help the Grant Making Committee evaluate grant requests. Requests should be at least \$500 and no more than \$3,000. **Requests must be post-marked by July 19, 2010.**

Please call our office, (219) 879-0327, if we can be of any help regarding the process. **This will be the ONLY Community Fund Grant cycle for 2010.**

**About Community Fund Grants:**

The Unity Foundation Community Fund was established to be responsive to local needs. This fund is permanent and only the earnings are spent each year. Through the 'miracle of endowments', these funds will be granted many times over and sustain our local efforts for generations to come. In 2009, we made \$100,000 in awards to worthwhile community projects in the arts, the environment, health and human services, education, and the community as a whole through the Community Fund Grant process.

**About the Unity Foundation:**

Since 1992, the Unity Foundation of LaPorte County has served donors, nonprofits and LaPorte County. It manages \$18 million in assets, administers more than 180 charitable funds, and has distributed more than \$7.5 million in LaPorte County through direct grants and scholarships. Because of Unity's efforts, an additional \$13 million was available to LaPorte County residents and agencies through outside grants and scholarships. The Council on Foundations deemed Unity Foundation in compliance with all Indiana and national ethical and operating standards for community foundations.

Unity helps donors carry out their charitable desires and helps them learn more about the causes they care about. It supports nonprofits through grants and technical assistance with management issues. In addition, Unity provides a permanent, growing source of grants, as well as a neutral meeting ground and leadership on important issues facing the county. For more information, please visit [www.uflc.net](http://www.uflc.net).

# *Unity Foundation of LaPorte County, Inc.*

## **GUIDELINES FOR GRANT APPLICATIONS**

The Unity Foundation of LaPorte County makes discretionary and field of interest grants to charitable organizations in the area of the arts, education, health and human services, the environment, and the community for the benefit of the citizens of LaPorte County, Indiana. In making grants, the Unity Foundation will be guided by the following general policies and considerations:

- Other than grants made to individuals through designated scholarship funds, grants will be made **only** to those non-profit organizations and programs operating in LaPorte County, Indiana.
- Grants will be made for a wide variety of programs and purposes, while striving for geographical balance.
- No grants will be made to churches for sectarian religious programs.
- No grants will be made for operating budgets or for basic municipal or educational functions and services.
- No grants will be made for endowment campaigns or for previously incurred debts.
- Grants will ordinarily be made for one (1) year only.
- No grants will be made to provide long-term funding. No grants will be made for post-event or after-the-fact situations.

### **The Unity Foundation of LaPorte County is particularly interested in funding:**

- Projects that are not adequately being serviced by existing community resources;
- Start-up costs for new programs;
- One-time projects or needs;
- Projects that provide leverage for generating other funds and community resources;
- Projects that facilitate cooperation and collaboration between organizations and the communities within LaPorte County, Indiana.

### **Application Procedure:**

Applications should follow the format outlined in pages 6 through 8 of this packet.

### **Timeline:**

- **July 19, 2010: Grant requests must be received or postmarked by this date.**
- Early September 2010: Grants are approved by the Board of Director, based upon recommendations of the Grant Making Committee.
- Mid-September 2010: Decision letters will be mailed to applicants.
- October 2010: Grants are distributed at the Unity Foundation annual luncheon.
- July 1, 2010: Year-end report is due.

## **Information Required:**

### **1. Description of the project (narrative):**

- a. The program or specific need you wish to address;
- b. Its significance to the community and its particular benefit to those living in the LaPorte County area;
- c. The names and qualifications of those persons who will carry it out.

### **2. Budget (budget guide):**

- a. Complete budget for the project;
- b. How you propose to fund it;
- c. The amount you are requesting from the Unity Foundation;
- d. The names of other funding sources to which you are applying for assistance.

### **3. Description of applicant organization(s) - (cover sheet and attachments):**

- a. The name, address, telephone, and fax number of the contact person;
- b. A list of your officers and board members;
- c. A copy of the IRS letter designating your organization as tax exempt under §501(c)(3) of the federal income tax code;
- d. Your latest annual financial report (e.g., what is presented to board members at regular board meetings); and
- e. Your latest audit or financial review;
- f. In addition, applicants have the *option* of including any descriptive brochures or promotional literature regarding the program/project (12 copies of each).

**The Application can be found at: [www.uflc.net](http://www.uflc.net)**

### **Questions should be addressed to:**

**Contact Person:** Sue Korte Regetz, Vice President  
Email: [skorteregetz@uflc.net](mailto:skorteregetz@uflc.net)  
(219) 879-0327 or (888) 898-6489

### **Application submission:**

#### **Submission by mail:**

The application **must** be postmarked by July 19, 2010, and **must** be mailed to:

Unity Foundation of LaPorte County  
PO Box 527  
Michigan City, IN 46361-0527

#### **Submission by hand-delivery:**

The application **must** be received by 5 pm on July 19, 2010, and must be delivered to  
(*please do NOT use this address for mailing*):

Unity Foundation of LaPorte County  
619 Franklin Street, Suite 201  
Michigan City, IN 46360

# *Unity Foundation of LaPorte County, Inc.*

## **FREQUENTLY ASKED QUESTIONS**

**What kind of organizations can request funds?** Generally, only charitable organizations with a verifiable 501(c)(3) IRS status operating or offering programs in LaPorte County, Indiana, will be considered. In the case of start-up or ad hoc organizations, the tax-exempt status may not be available. In that case, we suggested you find an organization to "host" the project or program and have them request funds with you. Collaboration is encouraged. Other charitable organizations, such as churches, may request grants for non-sectarian purposes only if the project will help the community. (See Guidelines for Grant Applications.)

**When can we request funds?** Grant requests may be submitted at any time; however, the Grant Making Committee has set July 19, 2010, as the deadline for this grant cycle. All requests **must** be postmarked by this date. You may be contacted for additional information. Funds will be granted based upon availability.

**Can individuals request grant funds?** Generally, no grants are made to individuals other than grants through scholarships or special awards.

**What if we're not sure our idea fits?** If you are not sure if your project or program is eligible for funding from the Foundation, you may call the Foundation office at (219) 879-0327, or you may submit a letter of inquiry by email to [unity@uflc.net](mailto:unity@uflc.net). This letter should contain a brief statement of the project or program needs and enough factual information to determine fit. Please also include a statement indicating you are interested in applying for a Community Fund Grant and want to know if your program is eligible. These inquiries will receive a prompt response in most cases.

**Who decides which grants are given?** All requests are reviewed by the Unity Foundation's professional staff and its Grant Making Committee. The Grant Making Committee's recommendations are presented to the Board of Directors at its regularly scheduled meeting, where final decisions are made. The Board of Directors reserves the right to decline any request that may jeopardize the Foundation or its IRS §501(c)(3) status.

**What if we need help drafting our request?** To attract complete, innovative, and good quality requests, the Foundation recognizes that technical assistance may be needed by organizations. The Foundation staff is available for this purpose and you are encouraged to utilize them as needed. All applications are reviewed prior to submission to the committee, but only applications received at least two weeks prior to the deadline will be offered the opportunity to enhance their applications if necessary.

**How will we know if we've been chosen?** All grant requests will be answered in writing. Determinations are generally made in early September, and decision letters are mailed in mid September. Grants are disbursed to recipients in early October.

**Do we need to do anything after the grant is made?** Each project will be somewhat different. If your organization receives a grant, you will receive a contract. Some contracts may include written details about the specifics of grant payments, follow up reporting, and evaluation. All grantees are expected to submit a year-end grant report by July 1 of the year following the receipt of the grant.

**Will the grant awards be publicized?** The Foundation will publish general information about its grants in local media, its own printed materials, and annual reports. Publicity about your grant can be done by your organization or in concert with the Foundation. The Foundation may occasionally wish to highlight specific grants and would work closely with your organization to determine the best strategy.

**How will the Foundation evaluate our request?** It is the general policy of the Foundation to operate without discrimination as to age, race, religion, gender, or national origin in its overall administration and grant making. Diversity, creative community development, and problem solving are greatly encouraged. In reviewing grant proposals, the Unity Foundation generally utilizes the following evaluation criteria:

1. Is there an established need? Will the project/program achieve the desired result?
2. Is it appropriate for the Unity Foundation to make this grant or are there more compatible funding sources?
3. Does the Unity Foundation have adequate resources or is the project/program too big?
4. Will the Unity Foundation's funds leverage additional resources?
5. Does it fit with the Foundation's areas of interest and geography?
6. Does it foster collaboration?
7. Does it have multiple impacts?

**How do we apply?** The Grant Making Committee has created a "Grant Request Cover Page", a "Grant Request Worksheet", and a sample "Budget Guide" to help make your submission complete. A written description of the program or project should be no more than two (2) pages. A complete list of the eight (8) pieces of information required and a summary of what you should include in your narrative is found on the "Grant Request Worksheet".

It will be up to your organization to put its best foot forward in explaining your idea. Please refer to the "Guidelines for Grant Applications" and the other information provided by the Foundation to help you create your request.

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## GRANT COVER PAGE

**PLEASE NOTE:**

1. **Application deadline is July 19, 2010. Applications must be postmarked by that date.**
2. **Application must be typed.**
3. **The completed application should follow the format of pages 6 through 8 as closely as possible.**

Name of Organization: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Title: \_\_\_\_\_

Address: \_\_\_\_\_ City, State, Zip \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_ Website: \_\_\_\_\_

President of Organization's Board: \_\_\_\_\_

**Project Title:** \_\_\_\_\_ **Amount Requested: \$** \_\_\_\_\_

**Brief Summary of Your Request:**

**FOR FOUNDATION USE ONLY**

Date Received: \_\_\_\_\_

Approved \_\_\_\_\_ Declined \_\_\_\_\_

Proposal #: \_\_\_\_\_

Date Acted upon: \_\_\_\_\_

Program: \_\_\_\_\_

Grant Report: \_\_\_\_\_

Subprogram: \_\_\_\_\_

Date: \_\_\_\_\_

**Grant Request Contains:**

Grant request cover page

Project/program budget

Past year's financial statement

Grant request narrative

Current financial statement

IRS determination letter

Names/addresses of Board members

Evidence of Board approval

**Grant Conditions:**

# Unity Foundation of LaPorte County, Inc.

## GRANT REQUEST WORKSHEET

In requesting grants, the following six issues should be addressed in a narrative of no more than two pages:

**1. Need(s)**

What is(are) the need(s) for the project or program in LaPorte County or its communities? Are there other groups working on this need? If so, what will you do that is better or different? How will you coordinate with existing efforts?

**2. Description of Project or Program**

Describe in detail how this project or program will operate. What is the purpose? What will this project or program accomplish?

**3. Who Will Benefit**

Describe who will be served. Include expected number, geographic location, and specifics of those targeted.

**4. Evaluation**

How will you evaluate this project/program? How will you and the Foundation know whether the purpose has been met?

**5. Impact(s)**

Describe the effect of this project on the organization(s), clients, and the community or targeted issue? How visible will the project or program be?

**6. Organization(s)**

What is the purpose of your organization(s) and who do they serve? What are the qualifications of the key staff or volunteers involved in this project or program? What evidence can you give of the ability of your organization or collaborative efforts to implement this project?

**Supplemental information required from requesting organization:**

1. What percentage of the board of directors contributed any amount of dollars to this organization in the most recent fiscal year? \_\_\_\_\_%
2. What percentage of the board of directors made an in-kind contribution to this organization in the most recent fiscal year? \_\_\_\_\_%
3. What percentage of the board of directors volunteered their time beyond attending board meetings? \_\_\_\_\_%
4. Have any members of your board of directors participated in non-profit training (e.g. board development, fund raising, grant writing etc.) this past year? If yes, please describe? \_\_\_\_\_  
\_\_\_\_\_
5. Does your organization have a strategic plan?  Yes  No When was it written or last revised? \_\_\_\_\_  
\_\_\_\_\_
6. Does your organization regularly conduct or review succession planning efforts?  Yes  No
- 7.

# Unity Foundation of LaPorte County, Inc.

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## BUDGET WORKSHEET

Please describe, in as much detail as possible, the budget for your project or program. Only provide full organizational budget if project cannot be extracted. We want to see how Unity Foundation funding fits into the proposed project. Note: revenue should match or exceed expenses.

**REVENUE** (Please label revenue sources as: potential [p]; actual/committed [a]; or in-kind [i])

Source

Amount

TOTAL \$ \_\_\_\_\_

## EXPENSES

Item

Amount

TOTAL \$ \_\_\_\_\_

## FINAL CHECKLIST:

Requests will NOT be considered without the following:

- 1. Completed "Grant Request Cover Page".
- 2. Completed grant narrative of no more than 2 pages addressing questions 1-6 on Grant Request Worksheet.
- 3. Completed budget for the project (see Budget Worksheet).
- 4. List of members and officers of the Board of Directors, their addresses, and occupations.
- 5. Most recent financial audit or review.
- 6. Organization's current financial statement as presented to the board of directors at its most recent meeting.
- 7. Copy of IRS determination letter for tax exempt status. If none, explain. (Not necessary if already on file)
- 8. Evidence this request is approved by the board of directors or governing body (e.g., letter, board minutes).