



Impact Lakeland 2009-2010 Application Guidelines and Instructions

Community Foundation of Greater Lakeland ■ 1501 South Florida Avenue Lakeland, FL 33803
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www.cfgl.org

Impact Lakeland Guidelines

The Community Foundation of Greater Lakeland provides all 501 (c) (3) organizations serving the greater Lakeland area an opportunity to apply for funding each year. The CFGL uses an electronic process for both the Letter of Intent (LOI) and grant application. The annual grant application process, *Impact Lakeland*, begins in the fall. All interested organizations must:

- Attend one of the CFGL *Impact Lakeland* grant orientations
- Submit a Letter of Intent (LOI) no later than 5:00 pm on October 2, 2009
- Receive notification from CFGL staff that the LOI has been approved
- Submit a grant application no later than 5:00 pm on November 6, 2009

Application Recommendations

Your application should:

- **Address problems to be solved or opportunities to be seized in the greater LAKELAND AREA;** especially when the project reaches a broad segment of the community or serves those not being adequately served by existing community resources. A listing of greater Lakeland area zip codes is available on the CFGL's website.
- **Demonstrate collaborative, coordinated efforts rather than a duplication of existing efforts.** Elements of collaboration include shared use of staff, fiscal responsibility, accountability and credit.
- **Demonstrate vision, action, creativity, effectiveness, and good fiduciary management.** This will be shown if the project strengthens an agency's effectiveness and provides a model for replication.
- **Illustrate a sound program budget and organizational budget.** The Lakeland community will benefit most from projects that are submitted by organizations with proven records of exemplary fiduciary management. This will be determined not only by the careful attention to the budget for your project but also by the way it fits into the overall budget of your organization. The CFGL will pay close attention to all sources of funding for your organization.
- **Show strong board leadership.** The CFGL Grant Committee will be looking for organizations that have boards composed of individuals equipped with the expertise necessary to help that organization remain strong and grow.
- **Be complete.** It will be up to each organization to submit complete applications. A checklist of what is required for a complete application is provided below. Make sure each section of your application is complete. If you have any questions concerning the application process, please contact the CFGL office. We will be glad to assist you. *Please note that the electronic process will notify you when each document is needed for upload.*
 - IRS Determination Letter (States your 501 (c) (3) status)
 - List of Board Members/Affiliates
 - Organization's Current Operating Budget
 - Most Recent Financial Statements: IRS Form 990, Audit, Statement of Financial Position "Balance Sheet."
 - Letters from collaborators (if applicable)
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Please be advised:

DO adhere to ALL instructions and deadlines listed in this booklet. There are no exceptions.

DO submit an application that includes a solid plan for full implementation and an effective evaluation process.

DO be as concise, logical, and specific as possible in order to clearly communicate your message. Please send only the material necessary for explaining your program.

DO make sure you send all the information required.

Electronic Application Instructions

Before you start this process please have available the following:

1. Your organization's Tax ID number (organization information page)
2. IRS Determination Letter (states your 501 (c) (3) status)
3. List of Board Members/Affiliates
4. Current Operating Budget
5. Most Recent Financial Statements
6. Letters from collaborators (if applicable)

When you are ready to begin the application process, log on to www.cfgl.org

The CFGL's home page includes a link ([click here to apply](#)) to the electronic application. You may want to print the application guidelines as you may need this information for reference as you complete the online application.

- The (click here to apply) link will take you directly to the log on page.
- You will be asked to create an account. Once you create a username (please use your work email) and password.
- You will be provided with a link that will begin your application.
- You will be prompted as to when specific documents need to be included. There are sections where you can either upload the document from a file, manually type information, or cut and paste the text into a text area.
- If you have hard copies of documents that need to be uploaded to the electronic application, please use the Fax-to-File function on the left side of the screen. Instructions will guide you through this process.
- Please make sure not to allow your computer to sit idle too long without saving a draft.
- **Please make sure your application is COMPLETE before submitting.** Once you submit the application you will not be able to make additional changes. You must save as a draft if you plan on making changes. **IMPORTANT TO SAVE APPLICATION AS DRAFT UNTIL YOU ARE POSITIVE YOUR APPLICATION IS COMPLETE.**

Please note: if you exceed character limits you will not be able to save a draft or submit the application. You **MUST** adhere to the character limits as well as the upload file sizes.

The LOI process streamlines processing the many requests received during the annual Impact Lakeland grant cycle. By reviewing qualifying information at the start of the process, the staff is able to rule out an inappropriate request before the agency expends undue time and resources. **The CFGL will NOT consider application requests for:**

- 1) Annual or building campaigns or capital expenses.
- 2) Events of any kind, or tickets for any event or advertising space of any kind.
- 3) Operating expenses such as rent, utilities etc., membership dues and/or fees.
- 4) Individuals.
- 5) Religious or sectarian projects that are not open to the greater Lakeland area.
- 6) Services commonly regarded as the responsibility of the government, such as street repair, fire or police protection.
- 7) Public or private school services required by state law, such as regular classroom instruction or athletic activities.
- 8) Political campaigns, or to influence legislation of any governmental body.

Letter of Intent

Q1: Please select the category in which your program falls:

- Arts and Culture
- Family/Elderly/Youth
- Education
- Health and Human Services
- Community Development
- Other

Q2: Please upload your IRS Determination Letter or the IRS Determination Letter of the 501 (c) (3) agency serving as the fiduciary agent for your project.

Q3: Please give name, telephone number and email address of appropriate contact person for the grant.

Q4: Service area information: The CFGL requires that all organizations applying for funding serve the greater Lakeland area. Fifty one percent (51%) of those being served by your program must be from the greater Lakeland area. Please list the zip codes being served by the program for which you are requesting funding.

Q5: Requested Amount

Q6: Brief project description

Q7: Please upload the projected program budget. Use the Program budget form available at www.cfgl.org

Q8: Executive Director's signature

LOI deadline is Friday, October 2, 2009. All LOI's must be submitted no later than 5:00 p.m.

Your organization should expect to hear back from Foundation staff on or before **Monday, October 12, 2009.** **If your LOI is approved you may return to the online application and complete begin your grant application.**

Grant Application

Q1: Project Name

Q2: Requested Amount

Q3: Did you receive funding from *Impact Lakeland* last year? If so, please state how much was received and what those funds were used for.

Q4: We may wish to support your program but may not have the resources to fully fund your request. Check "Yes" if partial funding is acceptable.

Q5: Please select the category in which your program falls:

- Arts and Culture
- Family/Elderly/Youth
- Education
- Health and Human Services
- Community Development
- Other

Q6: Brief Project Description - The description will be used to describe your project in our annual Impact Lakeland booklet. Description MUST include your target population the number of people who will be served and a timeline.

Q7: Organizational Information - History and purpose of the organization (including mission statement).

Q8: Project Description - Statement of needs/problems to be addressed; description of target population and how they will benefit. Please include a list of zip codes being served with this program.

Q9: - Description of project goals, measurable objectives, action plans and statement as to whether this is a new or ongoing part of the sponsoring organization.

Q10: - Which other agencies provide similar services and how are you cooperating with them? Please describe how your request differs from or builds on these efforts.

Q11: - List any other partners in the project, if any, and their roles.

Q12: - Description of the active involvement of constituents in defining problems to be addressed and in planning the program.

Q12: - Timetable for implementation of program. When will it begin and end? Is this an ongoing program?

Q13: - What are the long-term strategies for continuation of funding at the end of grant period?

Q14: Evaluation - How will success be defined and measured?

Q15: - Description of how evaluation results will be used and/or disseminated, and, if appropriate, how the project will be replicated.

Q16: - Description of the active involvement of constituents in evaluation of the program.

Q17: - If applicable, describe future plans and/or changes for the program, including estimated needs for growth and strategies for continuation of funding.

Q18: - Summary of why you feel this program is important to the future of the community and what needs are being met by this program.

Q19: Budget - Please download the budget form titled Project Budget located at www.cfgl.org This budget form is required to complete the application.

Q20: - Please include a project budget narrative below. Describe how each total is calculated.

Q21: Attachment 1 - 501 (C) (3) Determination Letter

Q22: Attachment 2: (List of Board Members/Affiliates) - You may cut and paste information here or upload a document.

Q23: Attachment 3: (Current Operating Budget)

Q24: Attachment 4: (Most Recent Financial Statements)

Q25: Attachment 5: (Letters from collaborators (if applicable) - You may cut and paste information here or upload a document.

Grant application deadline is Friday, November 6, 2009. All grant applications must be submitted no later than 5:00 p.m.

Grant Reporting

The CFGL utilizes grant reports to assess the effectiveness of its grant making in the community. The “Interim Report” and the “Final Report” forms can be found online at the CFGL website. There is a basic form for interim reports and a more detailed form for the final report. These reports supply the CFGL with the necessary information to determine that the grant is being used for the purpose intended and to fulfill the CFGL’s public reporting responsibilities. The CFGL staff is available for any questions regarding the completion of the report forms.

1. Grant Reports: After receiving grant funds, interim reports are due in June, October and February. Final reports are due within 60 days after completion of program.
2. Once funding is received, the first interim report must be submitted on the due date even if the project has not yet spent any of the funds.
3. The final report, including Budget VS. Actual must be submitted 60 days after the completion of the project.
4. Reports must be complete and thorough. Members of the CFGL’s staff, and in some cases members of grant committee or donor advisors, will review all reports of grantee forms. They will pay close attention to the "Final Report" of grantee and the applicable budget information. **Failure to provide necessary information could result in the loss of future funding privileges.**
5. Please provide photographs and supporting data. Photographs are a way in which the CFGL can assess the success of a project. Please be sure to provide adequate information about all supporting data that is submitted to the CFGL.
6. If an organization fails to submit interim, final and budget vs. actual report forms by the due dates, that organization may lose the privilege of applying for any additional *Impact Lakeland* grants. **If an agency is unable to submit required reports by deadlines they MUST contact the CFGL to apply for an extension.**
7. Since all funding awarded by the CFGL is to be used solely for the purpose described in the grantee’s application, modifications can only be made with prior approval of the CFGL’s grant committee. **All modifications must be submitted to the CFGL in writing.**
8. If, upon completion of your project there are remaining grant dollars, contact the CFGL office in writing prior to submitting your final report.

If at any time the CFGL determines that a grantee has not performed in accordance with the grant guidelines and procedures, or has deviated from the intended purpose of the approved project or the project’s budget, the organization will lose the privilege of applying for any additional grants from the CFGL and funding may be revoked.

Acknowledging Your Grant

When a program or project receives funding from the CFGL's grant committee, the CFGL *requires* recognition as a funding source. The CFGL is a public foundation; therefore, it is important that the public be informed of its grants. The following list is not meant to be a list of all required activities, but ideas for acknowledging your grant in whatever ways are within your organization's communication capabilities.

- Include news of your CFGL grant in publications you produce for external distribution, such as newsletters, annual reports, etc.
- Be sure your internal audience – staff, board members, volunteers, donors, clients – are aware of the grant through meetings, minutes, etc.
- Include CFGL logo on printed materials, including signs or plaques that recognize donors at events.
- If you mention the CFGL's support on your Web site, please include a link to the CFGL's site (www.cfgl.org).

Please use the following language to acknowledge your CFGL grant: *This program/project was funded (or funded in part) by a grant from the Impact Lakeland initiative of the Community Foundation of Greater Lakeland.*

In addition, the CFGL will include a window cling for use by the organization at the organization's office location.

If you have any questions regarding acknowledging your grant please contact us at 863/683-3131.

Expenditures of Funds Policy

- 1) **Grantee must maintain adequate records.** The grantee is responsible for the expenditure of funds and for maintaining adequate supporting records that are consistent with generally accepted accounting principals.
- 2) **Grantee must notify the CFGL on unused funds.** If, upon completion of your project, your organization finds that it did not use the total amount of dollars granted, please contact the Community Foundation office.
- 3) **Grantee must notify the CFGL of changes to the project.** Since all funding awarded by the CFGL is to be used solely for the purposes described in the grantee's application, modification can be made only with approval of the CFGL's grant committee or by the granting fund advisor(s). All modifications must be submitted to the CFGL's in writing prior to implementation.
- 4) **Loss of funding privileges.**
 - If at any time the CFGL determines that a grantee has not performed in accordance with this agreement or has deviated from the intended purpose of the approved project or the project's budget, the organization will lose the privilege of applying for any additional grants from the CFGL. All unexpended grant dollars **must** be returned to the CFGL.
 - If a grantee loses its federal tax exemption status under Section 501(c)(3) of the Internal Revenue Code or is no longer an organization described in 170(c) of the Internal Revenue Code before the completion date of the approved project, they must notify the CFGL immediately. All unexpended grant dollars **must** be returned to the CFGL immediately.

Deadlines

Letter of Intent..**Friday, October 2, 2009***

The CFGL will notify you on the status of your LOI on or before

LOI Status.....**Monday, October 12, 2009**

Grant Application Due.....**Friday, November 6, 2009***

The CFGL will notify you on the status of your application on or before

Approved/Denied Grant Status..... **Friday, December 4, 2009**

Important Dates

Notice of Funding.....**Friday, January 29, 2010**

****All deadlines are to be met by no later than 5:00 p.m. on each due date.***

If you require further information, please contact Cherie Simmers 863/683-3131 or csimmers@cfql.org

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