



# **Impact Lakeland 2012 Application Guidelines and Instructions**

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[www.cfgl.org](http://www.cfgl.org)

# ***Impact Lakeland Guidelines***

The Community Foundation of Greater Lakeland provides 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. This year the annual grant application process, *Impact Lakeland*, begins on September 1, 2011. All interested organizations must:

- Submit a Letter of Intent (LOI) no later than midnight on September 15, 2011
- Receive notification from CFGL staff that the LOI has been approved
- Submit a grant application no later than midnight on October 21, 2011
- Your *Impact Lakeland* project must operate in, or provide services to the greater Lakeland area. A zip code map is posted on the CFGL website.

## **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.
- **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 project 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.
- **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)

## 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
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](http://www.cfgl.org)**

Once you are on the CFGL's home page, click on the words Impact Lakeland located on the top right hand corner of your screen. The Impact Lakeland page includes a link to a tutorial on using the grant application software, a PDF copy of the application guidelines, a PDF copy of the greater Lakeland area zip codes your project must serve, and the link ([click here to apply](#)) that directs your browser to the Foundant Grant Life Cycle Manager where you will complete your LOI, application, and if awarded a grant, your interim and final reports associated with the grant award.

- 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 a unique 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, 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.
- **IMPORTANT TO SAVE APPLICATION AS DRAFT UNTIL YOU ARE POSITIVE YOUR APPLICATION IS COMPLETE.**

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 an Impact Lakeland application for:**

- 1) Annual or building campaigns or large capital expenses not directly related to your project
- 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 is 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.

The following is a list of questions that appear on the Letter of Intent:

- Q1:** Project Name
- Q2:** Brief Project Description
- Q3:** Amount Requested
- Q4:** Program Area (a drop down list – chose one)
- Q5:** Does your agency/organization have its 501 (c) (3) tax-exempt status?
- Q6:** Enter your organization’s Federal Tax Identification Number
- Q7:** Please upload your IRS Determination Letter
- Q8:** If your agency DOSE NOT have its own tax-exempt status, what 501 (c) (3) serves as your fiscal agent? Please upload IRS Determination letter or your group ruling letter.
- Q9:** Please provide brief description and history of your organization.
- Q10:** 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.
- Q11:** Please detail how the funding you are requesting will be directly applied to the project described above. A budget form is not required with the LOI; however, a budget form must be submitted with the full application.
- Q12:** CEO/Executive Director Signature (Yes or No)

**LOI deadline is Thursday, September 15, 2011.** All LOI’s must be submitted no later than midnight.

Your organization should expect to hear back from Foundation staff on or before **Friday, September 30, 2011.** **If your LOI is approved you may return to the online application and complete begin your full grant application.**

The following is a list of questions that appear on the grant application:

- Q1:** Project Name \*
- Q2:** Brief Project Description \* – This description will be used to describe your program in our annual *Impact Lakeland* booklet.
- Q3:** Requested Amount \*
- Q4:** Program area (Drop down list) \*
- Q5:** Partial Funding – will your agency accept partial funding for this project?

**Q6:** Organizational Information - History and purpose of the organization (including mission statement).

**Q7:** Project Description – Please provide a detailed description (more detail than the brief description entered on your LOI) Include 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.

**Q8:** Description of project goals, measurable objectives and expected outcomes.

**Q9:** Duplication – Are you aware of duplication of efforts? Are there any other programs in the greater Lakeland area providing the same services and opportunities? How is your project unique?

**Q10:** List partners and collaborators and their role in project.

**Q11:** Description of the active involvement of constituent/participants/collaborators in defining problems to be addressed and in planning the program.

**Q12:** How will you engage participants?

**Q13:** Timetable for implementation of program. When will it begin and end? Is this an ongoing program?

**Q14:** If this project is ongoing, what are the strategies for continuation of funding at the end of grant period?

**Q15:** Is this a one-time project?

**Q16:** Project Budget Form – complete and upload budget form

**Q17:** Please include a project budget narrative below. Describe how each total is calculated.

**Q18:** Evaluation – How will you evaluate the success of this project?

**Q19:** How will evaluation results be used and disseminated? If successful, can this project be replicated?

#### **REQUIRED DOCUMENTS**

**Q20:** Upload or list names of current Board Members/Affiliates) - You may cut and paste information here or upload a document.

**Q21:** Upload Current Operating Budget

**Q22:** Upload your agency's latest IRS 990 Form or most recent financial statements

**Q23:** Upload letters from collaborators (if applicable) – You may use Fax to File feature here

**Q24: CEO/Executive Director Signature (Yes or No)**

**Grant application deadline is Friday, October 21, 2011.** All grant applications must be submitted no later than midnight.

## 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 March 3, June 3, September 3, and December 3 until all funds have been expended. 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 or the fund advisor that recommended the project. **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 of suggestions 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, and 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](http://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 of 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.

## Important Dates

Letter of Intent .....**Thursday, September 15, 2011\***

LOI Status.....**Friday, September 30, 2011**

*The CFGL will notify you on the status of your LOI on or before the date listed above. If your LOI is approved continue to the next step of the filing process.*

Grant Application Due.....**Friday, October 21, 2011\***

Approved/Denied Application Status..... **Friday, November 18, 2011**

*The CFGL will notify you on the status of your application on or before date listed above. If your application is approved your project will be included in the 2010-2011 Impact Lakeland Booklet. Projects are chosen for funding from this publication.*

Grant Awards Announced .....**Tuesday, January 31, 2012**

*Grants awarded through the CFGL's Grant Committee Unrestricted Fund will be announced. All projects in Impact Lakeland Booklet remain eligible for funding from a donor. Projects may be funded throughout the year closing upon the commencement of the next grant cycle.*

***\*Deadlines are not effective until midnight on each due date.***

***If you require further information, please contact Cherie Simmers, Director of Agency Relations, by phone or email at The Community Foundation of Greater Lakeland.***

***Phone: 863-683-3131***

***Fax: 863-683-3131***

***[csimmers@cfgl.org](mailto:csimmers@cfgl.org)***

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