

# Barrington Area Community Foundation

2010 Grant Committee Workshop

November 5<sup>th</sup>, 2009

Barrington Area Library

# Important Dates

- October 2009: 2010 Application posted on website. Fill-able Word document preferred.
- November 5, 2009 Workshop.
- November 6, 2009 Applications accepted.
- February 1, 2010 (2-01-2010): Cutoff date for submission (must be received by that date, before close of office, regardless of postmark date).

# Application Materials to be Complete

- Electronic (email or CD) preferred for application and as much of materials as possible. (A)
- Mission statement (B): Purpose, concept for your non-profit organization.
- Project Budget (C) and Agency Budget (D)
- Timetable for Project (E)
- Financial Statements (F)
- IRS 990 Filing (G): most recent year that is completed and submitted.
- Tax –Exempt ruling (H)

# Basic Organization Information

- 1. Name of Organization:
- 2. Address of Organization:
- 3. Telephone: Fax:
- 4. Point of Contact (POC) and title:
- 5. Additional Contact Information (extension, other contacts):
- 6. Email Address for POC:
- **7. Are you a 501(c)(3) IRS recognized non-profit: If not please contact BACF before proceeding**
  - **Yes, enclosed copy of ruling from IRS. Applied, enclosed copy of application to IRS.**
- 8. IRS TIN or EIN for your organization (from your 990): #
- 9. How long have you been servicing the Barrington Area? Years.
- 10. How much of your services are provided outside of the Barrington Area? Attached supporting document D. % of expenses, % of programs.
- 11. How much (%) of your funding is derived from government or taxpayer resources? If none state so: %. Fiscal year date used for this calculation:
- 12. What are your major funding resources for the past 3 years?

# Project, Mission, Unmet Need, Synergy, & Local

- 13. Project Title:
- 14. Brief 25 word summary of grant proposal (your summary will be cut off at 25 words for databases). Detailed Proposal on following pages.
- 15. How does this project relate to your organization's mission statement? How does this project support your organization's other works/projects?
- 16. How will your project benefit the Barrington Area in meeting an unmet need? Who will benefit from the program? What are your desired outcomes?
- 17. Do other organizations address the need/issue, and if so, how will does your project relate or interact with these organizations' projects?
- 18. Will your project be beneficial outside the Barrington Area and to what extent? No. Yes. Explain:
- 19. When will this project be completed?

# Project Finances: Budget, Sustainability, Metrics for Evaluation

- 20. What is your total budget for this project? (Breakdown Attachment C)
- 21. How much Funding are you requesting from BACF? \$ .
- Explain how the funds will be utilized: included in Attachment C and/or clarifications
- 22. What other funding sources are available to your organization for this project?
- 23. Will this project continue after your fiscal year or be renewed annually in your budget?
- 24. How will the project continue to be funded after this year's BACF seed grant if received? List other potential sustainable funding after the grant year.
- 25. If the grant is not received, what will happen with the project?
- 26. How will you evaluate the success of your project as it relates to your mission and fulfilling the unmet need? What tracking mechanisms and documentation will be utilized to show the effectiveness of this project? At the end of the fiscal year what metrics will be utilized to measure the added benefit to the Barrington Area in meeting an unmet need?

# Application Reviewed for Completeness

- November 6, 2009 – February 10, 2010: all applications are reviewed for completed materials, attempt to contact charity for incomplete applications. However, incomplete applications can be summarily rejected. Applications that are received earlier are reviewed earlier, giving higher likelihood that they will have had time for revision if needed.

# Timeline (cont)

- Feb 2 -10: a list of submitted applications are distributed to Grants committee and refined conflict of interest signed, which recuses reviewer if the individual or immediate family member has a conflict.
- Feb. 11: grant applications are distributed, for primary review and interview
- Feb 15 – March 2<sup>nd</sup> Primary Interviews

# Primary Interviews: February 15 – March 2<sup>nd</sup>, 2010

- Purpose: to review application and materials to understand grant project and organization.
- Can be done onsite or by phone.
- Length of time depends on complexity of grant project and application materials.
- Multiple primary interviewers possible based on total grant request and if multi-year.

# Primary Reviewer Scoring and Rating

- Scored in Categories:
  - ***Benefits the Barrington Area:*** as defined by the greater of the area of BACOG or School District 220:
  - ***Effect of Grant in Meeting and Unmet Need:***
    - Sustainability
    - Unique Grant/Unmet need
  - ***Government Support***
  - ***General Fundraising or Degree of Public Support:*** Less points if should have been able to fund this project with own funds. Look at funds, endowments.
  - ***Budget/ Grant's Efficiency:*** Look at the specific grant budget but also the full annual organizational budget. Synergy with other organizations. Efficiency of budgets: expenses
  - ***Project Consistent with Applicant's Mission:***
  - ***Grass Roots:*** Use of local resources- volunteers, presence, and staff

# Primary Review Scoring and Rating

- The scores are not averaged or cumulative, but used to justify the Rating. . It is **possible that any single grant may have a higher total score but a lower rating**, since some categories scores may have more significance either positively or negatively when accounting for the rating.
- Grant Application is Rated:
  - The following Rating scale will be utilized:
  - A: Definitely Fund Grant Fully
  - B: Definitely Fund, but reduced amount as listed.
  - C: Fund only if A and B are all done.
  - D: Do not fund, better to add to B or A.

# Timeline (cont)

- By March 3<sup>rd</sup>, all primary scoring and rating sheets submitted to committee.
- By March 8<sup>th</sup>, primary scoring and rating sheets distributed and all grants committee submit a rating with possible comments or questions.
- On March 10<sup>th</sup>: all grant applicants notified of 2<sup>nd</sup> stage interview time if requested. Note: some of Highest rated may not need a 2<sup>nd</sup> stage interview.

# Primary Rating by Grants Committee

- Based on the collated results adjustments will be made to the initial staging/rating of the grant proposal:
- Rated A: majority 50% or > rated as A, no D votes, and less than 30 % C votes; otherwise Rated B.
- Rated B: majority 50% or > rated as B or A combined.
- Rated C: majority C or B or A votes, and not qualified for a higher category

# 2<sup>nd</sup> Stage Interview

Saturday, March 13<sup>th</sup>, 2010.

- Location: Not yet finalized. Time and place will be given by March 10<sup>th</sup>, will be in Barrington Area.
- Plan on waiting up to 1 hour and interview should take about 10 minutes.
- Be familiar with what you have submitted, may have more than one representative, but time allotted will remain unchanged.

# Example questions

- Don't understand on the financials....?
- Is this project sustainable after the grant in meeting unmet need of...?
- How does this differ than Charity Z's program? Have you contacted them or are you working together?
- Why is this not part of your current operational budget or fundraising drive?

# Be relaxed

- You have already passed the first stage.
- Some of the questions are to allow us to present the information to the whole board for approval.
- Last year some of the tougher questions were posed to the organizations that received larger grants to ensure the need that was present.

# 2<sup>nd</sup> Stage Evaluation

- After Interview a preliminary 2<sup>nd</sup> stage letter rating assigned individually.
- After all interviews, Letter ratings collected and discussion on grants where wide variances occur.
- A's fully funded, B's and C's are ranked by each member and then rankings are averaged to have a final B's ranking and C's ranking (C's not ranking if apparent that no funding will remain after B funding).

# Recused Members

- Do not rank any grant application for which a potential conflict exists.
- Do not participate in any discussion of such grant applications.
- Are not present during the interview of any such grant applicant.
- Only vote on the final total grants once established, but are not allowed to discuss any potential grant award, vote is only for quorum purposes.

# Timeline

- In April: Recommendations from the Grants Committee are presented to the Full BOD, and amended as necessary and approved.
- In April or early May: notification sent to applicants on approval or rejection regarding their grant request.
- The actual award amount is not disclosed until the award presentation. Grant Awards have ranged from 10 -110% in the past.

# Grant Award Presentation

- In late April or early May, 2009
- Only those that receive awards are invited. Up to 2 representatives per organization (if a combined grant application 2 for each organization).
- BACF BOD are also present, as well as media invited.
- Pictures are taken for press release.

# New for 2010

- BACF BOD have asked that awardees help build awareness by displaying their plaque and including acknowledgement in any press contacts, donor newsletters and websites which relate to the grant project.
- Grant awardees may be asked to participate in joint press releases or BACF donor events.
- Best Use of Volunteers: \$1500 separate simple application and process. Check website for details to be posted.
- Audit this year will include a written submission and a site or project visit by BACF BOD representative.

# Questions

- Can email: Mary Bradford-White or Young Chung at [admin@barringtoncommunityfoundation.org](mailto:admin@barringtoncommunityfoundation.org) or [registeryc@comcast.net](mailto:registeryc@comcast.net)
- Or call BACF Offices at 847-382-8800.