![Charlotte Lesbian and Gay Fund logo]

A Collective Giving and Endowment Fund of Foundation For The Carolinas

2018 BASIC OPERATING GRANTS - APPLICATION GUIDE
For the period July 1, 2018 – December 31, 2018

For the 2018 grants cycle, the Charlotte Lesbian and Gay Fund (CLGF) will award grants to Charlotte-area organizations serving the gay, lesbian, bisexual, transgender and queer (LGBTQ) community through its Basic Operating grants.

CLGF Basic Operating Grants are intended to build capacity and strengthen the effectiveness of 501(c)(3) nonprofit organizations serving Charlotte's LGBTQ community. Grants will be awarded to support general operations of organizations that fulfill the Fund's vision:

"…to cultivate one community with the belief that all people should be treated with respect and dignity."

This document is meant to be a guide for applicants as they complete the application process.

CLGF has limited discretionary funds. Therefore, many exemplary proposals cannot be funded. Because of the volume of requests, we cannot provide written feedback on all proposals that are not funded.

To conduct a fair and ethical grants program, a Conflict of Interest Policy is followed and requires that volunteers and/or staff be excluded from the grant process for an organization with which they are affiliated. Please do not lobby Board or Grant Committee Members on behalf of your organization.

For questions, contact Alexis Owens at Foundation For The Carolinas, aowens@fftc.org.

AREAS TYPICALLY NOT FUNDED
- Capital campaigns and endowment funds
- Hardware, software, or other similar forms of technology infrastructure
- Organizations for re-granting purposes
- Debt retirement/deficit funding
- Projects that promote policy advocacy, political activity or religious views
- Activities occurring prior to grant decision
- Projects typically the funding responsibility of federal, state or local government
- New proposals that duplicate existing or established programs or services
- Strategic Planning in "ordinary course of business"
- Publication of books

2018 CLGF GRANT CYCLE OVERVIEW

Online Registration and Application Available
- Before you can apply for a CLGF grant, all applicants must complete an online registration on the Foundation For The Carolinas website.
- **IF YOU HAVE REGISTERED FOR A PRIOR YEAR GRANT CYCLE OR APPLICATION, PLEASE USE THE SAME REGISTRATION INFORMATION.**

Deadline to submit application: Friday, February 2, 2018, 12:00 NOON
- Grant applications will be available online at https://fftcgrants.communityforce.com beginning January 1, 2018.

Grant application review sessions
- CLGF provides Stakeholders (donors of $1,000 or more annually) the opportunity to provide input to grant awards. Two sessions are held in April (see timeline, below) to allow Stakeholders, Board members, and other representatives of CLGF or Foundation For The Carolinas to ask questions about applications.
- Please plan to send a representative from your organization to attend and have them be prepared to answer any questions about your application, organization, financials, objectives, etc.

Grant Evaluation reports
- CLGF takes its governance role very seriously and must ensure that grant award funds are spent appropriately and as intended. With limited funds to award, CLGF also monitors the effectiveness of funds spent to ensure grants are meeting community needs and prioritized efficiently.
- Each grant recipient is therefore required to submit an Evaluation Report, outlining the results and effectiveness of how the funds were spent. Not completing an evaluation will jeopardize future grant participation.
- Evaluation reports are also used for CLGF communications and may be used as input in future grant decisions for your organization. This "state of the organization" summary helps gauge the results that were achieved by providing the Operating funds.
- **Evaluation reports for General Operating grants will be due February 1, 2019** (reporting period July 1, 2018 to December 31, 2018)

Grant use deadline
- General Operating funds must be used on or before June 30, 2019.
- Funds not used by this date must be returned to the CLGF.

GRANT REQUIREMENTS – GENERAL OPERATING FUNDS

- Grant awards must be made to eligible 501(c)(3) nonprofit organizations. (Applying organizations must have their 501(c)(3) status at the time the application is received)
- Operating grants are only awarded to organizations whose primary objective is to provide services or benefits to the LGBTQ community.
- Applicants may apply for ONE Operating grant per annual grants cycle.
- The CLGF Board and Grants Committee reserve the right to request additional information at any time.
- Grant funds not spent for approved purposes specified in the grant application must be returned to CLGF.
- Applicant organizations must attest that their membership and/or service population are contained within the Charlotte-Mecklenburg community, and must agree to use grant funds solely within Mecklenburg County.

FUNDING PRIORITIES

Applicant organization's services should support CLGF's mission and vision by including these key components:

- **Build** understanding and appreciation as well as promote value of inclusion within the organization's circle of influence, especially LGBTQ populations not previously targeted.
- **Cultivate** opportunities for leadership by contributions of LGBTQ people.
- **Engage** and include all people from diverse backgrounds and sexual orientation in programs, services and organizational values.

Evaluation Considerations

As you complete your application, give special consideration to documenting these priorities. They will be used in grant evaluations.

- **Scope of impact**: This organization has a positive impact on its audience and the Charlotte LGBTQ community.
- **Nurtures individuals to actualize their potential**: This organization supports individuals within the LGBTQ community as they make their personal journey through acceptance, pride, support of community, and leadership.
- **Presents a positive image of LGBTQ people to the community**: This organization presents a fair and positive understanding of people who are lesbian, gay, bisexual, transgender and queer.
- **Effectiveness**: This organization is an effective way of providing the services and benefits it offers.
- **Diversity**: This organization engages and includes people from diverse backgrounds
- **Defined measures**: This organization identifies clear objectives and uses metrics and measures to define a successful outcome.
- **Project Budget**: This organization's budget presents reasonable costs for services performed and an efficient way to achieve the objectives.
- **Organizational Experience**: This organization has the appropriate talent, skills, and experience to execute its objectives and effectively utilize grant funds.

2018 GRANT CYCLE TIMELINE

December 1, 2017	**Application Guide Available on FFTC website –** • Interested applicants can contact the CLFG with any questions • Grants committee members will be available to meet with organizations on an ad hoc basis to discuss the process and to answer questions
January 1, 2018	**Online Grant Applications Available** • Information can be entered and saved, to be completed later, before submitting. • Applications will be entered online (https://fftcgrants.communityforce.com)
January 1, 2018	**Starting date to submit Grant Application**
February 1, 2018	**Operating Grant Application Deadline** • Friday, February 2, 2018 at 12:00 NOON • Note PPE Grant Deadline is Friday, February 9, 2018 at 12:00 NOON
Feb/March, 2018	**CLGF Grants Committee internal review** • You may be contacted to provide any required information omitted from the application
Monday, April 9, 2018 5:45pm – 8:15pm	**Grant Review Session – PPE Applications** • Applicant representatives attend to answer questions • Location: YWCA, 3420 Park Road, Charlotte
Wednesday, April 11, 2018 5:45pm – 8:15pm	**Grant Review Session – Operating Grant Applications** • Applicant representatives attend to answer questions • Location: YWCA, 3420 Park Road, Charlotte
April 20, 2018	**Notification of Grant Award Decisions** • Notifications will be e-mailed to all applicants informing them whether they have been awarded a 2018 Grant
May 2018	**Invitation to public announcement of 2018 grants** • Grant recipients will be invited to attend 'The Happening' annual luncheon
May/June 2018 TBA	**Grant distribution and agreement to provide a written evaluation**
May 16, 2018	**Public grant awards announced at 'The Happening' Luncheon** • Location: Westin Hotel, Stonewall & College, uptown Charlotte
Throughout the cycle (July, 2018 – June, 2019)	**PPE Evaluation reports due** • Grants for PPE's that have a specific end date require an Evaluation Report within 30 days of the PPE conclusion.
February 1, 2019	**Operating Grant Evaluation reports due** • All Operating grants require an Evaluation Report by February 1, 2019 • Evaluation report covers the period from July 1, 2018 to December 31, 2018
June 30, 2019	**Grant use deadline** • Basic Operating Grant funds must be used on or before June 30, 2019 • Funds not used by this date must be returned to the CLGF.

SUBMIT APPLICATION STARTING JANUARY 1, 2018
NO LATER THAN FRIDAY, FEBRUARY 2, 2018, 12:00 NOON

Before You Begin: Strategies for a Successful CLGF Application

How Should You Start?

Know your purpose: are you seeking unrestricted operating support, or funding to underwrite a program or project? Clarify your organization's priorities and/or the program's needs before doing anything else. In many cases, that will help you choose the correct application form to submit.

If there is a similar program or organization already in your region, please discuss the potential impact: does it represent an expansion or duplication of services in your area? If not, define how yours is different or better-suited for your community.

Research, Research, Research

Carefully identify foundations and corporations that make grants to your type of organization in your geographic area. Visit funders' websites, request their annual reports, and obtain proposal guidelines like these. Be certain that the purpose of your proposal fits within the funder's scope and priorities.

It is imperative to tailor each request, particularly the goals and measurements, to the specific interests of each funder. So pay close attention when you research these funders, and don't buy into the belief that a one-size-fits-all proposal will suffice.

> **TIP**
> Do not simply cut and paste from an old proposal – pay close attention to your dates and details.

Ensure You Submit a Complete Application

Foundation For The Carolinas' online application system provides applicants with a dashboard, so you can know ahead of time what components are necessary, and whether or not your application contains the appropriate materials.

Most proposals or applications require the following items:

A. <u>Basic information on your organization</u>: mission statement, legal name or DBA, Federal Tax ID number or fiscal sponsorship, address, contact info, etc.

B. <u>Budget dollars</u>: for operating budgets, look at your total income and expenses for the year, making sure to provide for salaries and overhead whenever possible; for program/project budgets, enter as much information as possible to represent the costs of successfully completing the program or project. Show your organization's income sources – make a pie chart that shows how much income is derived from tickets sales, board contributions, member dues, individual donations, corporate sponsorships, foundation grants, etc.

> **TIP**
> Almost all funders want two years of both budgeted and actual dollars (not profit and loss statements, not bank statements).

C. <u>Narrative or needs statement</u>: this is why you need to know your organization's priorities or your programmatic needs. This part describes not only why your organization is requesting support from the funder, but also **how and why it aligns with your funder's priorities**.

> **TIP**
> Share your passion, your organization's strengths, and how you will make a difference through your work. Differentiate yourself from similar or competing organizations.

   a. Be clear and succinct – your word count or your character count is limited;

   b. Identify the problem to be addressed and the needs to be met by the project. What unique service(s) would the community be deprived of if you do not undertake this project? Provide supporting data whenever possible.

   c. Describe your program objectives, activities, strategies, staffing, partners, and timelines; explain how the design will enable you to address the problem or need. Identify the project as a new or continuing program.

   d. Consider specifying your plans for continuing your progress at the termination of the grant, particularly if operating expenses are projected to increase. List other financing sources or strategies you are developing.

D. <u>Goals and metrics</u>: What does your organization plan to do? Describe the goals and overall impact of the group or project/program. List objective measures that will determine the success of your mission or project/program. Minimize subjectivity wherever possible – emphasize how you will be able to gauge whether or not you succeeded.

E. <u>Attachments</u>: Budgets, IRS 501(c)(3) determination letters, NC Solicitation License letters, Board of Director and/or staff list, letters of support from project partners (if applicable), etc.