



# Taylor County Endowment Foundation

Helping Taylor County Grow

## **Grant Application Overview – 2023 Grants**

**Mission Statement:** It is the mission of the Taylor County Endowment Foundation to distribute funds for educational, cultural, civic and charitable purposes for the benefit of the greater community of Taylor County, Iowa. Principles have been established to assure equitable and effective grant making of these funds, thus enhancing the quality of life for citizens of Taylor County, Iowa.

**What we support:** The Taylor County Endowment Foundation will provide grants to build community strengths and develop leadership potential. Areas of Foundation giving are health and human services, recreation and environment, arts and culture, community betterment, education, and youth development. The Foundation will fund special projects, but will not fund ongoing operational expenses.

### **Who is Eligible to Apply for Funds:**

- Organizations providing services within Taylor County.
- 501(c)(3) tax-exempt, not-for-profit organizations.
- Governmental entities and their components (*Fire Dept., Ambulance, Libraries, Parks, etc.*)
- Entities operating and organized in compliance with applicable laws prohibiting discrimination.
- Organizations which are not a 501(c)(3) or a unit of government which have completed an agreement with an eligible fiscal sponsor.

**Grant application deadline is Wednesday, March 1, 2023.**

**2023 grants will have a maximum request of \$10,000!**

### **2023 Board Members are:**

President David Henry, Vice President Nicki Trost, Secretary Mary Lou Klassen  
Chris Leonard, Donna Melvin, Debbie Miller, Jackie Minor, Stefanie Nickell, Brad Meyer, Trevor Fletcher and Alicia Lynn.

**We *ENCOURAGE* completed applications to be e-mailed to [taylorcoendowment@gmail.com](mailto:taylorcoendowment@gmail.com)  
OR ONE (yes, only one!) paper copy may be mailed or delivered to either of the following.**

Dave Henry  
State Savings Bank  
Bedford, IA 50833  
712-523-2131

Deb Miller  
Iowa State Savings Bank  
Lenox, IA 50851  
641-344-3095

## Grant Application Instructions

### **Checklist/Instructions:**

- Cover Page has been completed, including contact info and Federal Tax ID number
- Description of Organization and Brief Description of Project have been completed
- All Questions of Purpose have been answered
- Project Budget detail has been completed, including info about matching funds
- Written estimates and bids should be included if at all possible.
- No handwritten copies accepted – the first four pages of instructions do NOT need to be submitted.
- The electronic option for submission is preferred. If a paper application is submitted **only one copy is needed.**
- Do NOT put applications in binders, notebooks, or other presentation packages
- Copy of 501(c)(3) IRS Determination letter attached to grant application
- Fiscal Sponsorship agreement completed if a fiscal sponsor is being user
- All grant applications must be e-mailed to [taylorcoendowment@gmail.com](mailto:taylorcoendowment@gmail.com) or postmarked with USPS postmark or hand delivered on or before March 1, 2023.

### **If funded, these steps are necessary:**

- **AS we did in 2022, we will once again provide grant dollars immediately to the projects and organizations chosen to receive funding.** We are excited about the opportunity to help fund your projects upfront as we partner with you towards their completion.
- **There will be no in person Awards Ceremony this year.** If your project is selected one of the TCEF Board Members will contact you by mid-March.
  - Whenever possible a Board Member(s) will meet with one or more representatives of your organization to present the check in person. Photos will be taken and in lieu of the Awards Ceremony, we hope to have a “**virtual parade**” of projects receiving funding.
  - **A final report detailing completion of your project,** publicity, invoices and proof of payment must be submitted. Reports are due within 30 days of completion of project.
- **All funds not expended for the purposes agreed to** by the grantee and Taylor County Endowment Foundation must be returned to TCEF.

## **Definitions/Explanations**

**Fiscal Sponsor:** is an organization that is receiving the money on behalf of the grant applicant and is responsible for disbursing the money for the project and maintaining appropriate documentation. This entity must be a 501(c)(3) or a component unit of government in order to serve in this capacity. A fiscal sponsorship agreement must accompany the grant application if a fiscal sponsor is being used.

Organizations must be recognized by the Internal Revenue Service as tax-exempt, nonprofit, public charities under section 501(c)(3) or as a government entity or a component thereof to receive grant funding. A 501(c)(3) is a section of the Federal Tax Code, which establishes the criteria for tax-exempt charitable organizations. Component units of government are agencies that conduct activities to benefit the public at large, like public schools, cities, public libraries, and volunteer fire departments, etc.

# **It is important that you read the attached Guidelines for Grant Making for additional details.**

## **TAYLOR COUNTY ENDOWMENT FOUNDATION GUIDELINES FOR GRANT MAKING - 2023**

### **COMPETITIVE GRANT REVIEW CRITERIA**

#### 1. Who is Eligible?

- 501(c)(3) tax-exempt, not-for-profit organizations.
- Governmental entities and their components (*Fire Dept., Ambulance, Libraries, Parks, etc.*)
- Organizations which are not a 501(c)(3) or a unit of government which have completed an agreement with an eligible fiscal sponsor.
- Organizations providing services within Taylor County.
- Entities operating and organized in compliance with applicable laws prohibiting discrimination.

#### 2. We look for projects that:

- Address significant community issues.
- Present innovative, creative and practical proposals which build on community strengths.
- Develop the leadership potential of the community.
- Involve the people served in the planning and implementation of the program.
- Provide a plan for sustainability beyond the funding period.
- Capital projects that impact a significant number of county residents.

#### 3. Projects considered for funding should address needs in one or more of these areas: a.

- Arts/Culture/Humanities
- b. Human Services
- c. Education
- d. Environment/Animals
- e. Public/Society Benefit
- f. Health

#### 4. What We DO NOT Fund:

- Ongoing project support and operating support
- Annual and capital campaigns
- Budget deficits
- Endowments
- Individuals
- Recurring expenses
- Religious purposes – this does not exclude grants to religious organizations for non religious purposes.
- Reimbursement of expenses incurred or paid prior to the approval of the grant application.

#### 5. How Much Can Be Funded?

- Taylor County Foundation has set a project application maximum of **\$10,000**, which is to be matched dollar for dollar by the applicant for a total of \$20,000 per project. Grants of smaller amounts will also be encouraged. The size of the grant will not be as important as the impact of the proposed project.
- Large projects may be broken into smaller components with separate applications submitted for different parts of the project. Groups submitting more than one application related to the same large project should indicate which one(s) have priority for them, in the event that TCEF is able to fund one or more but not all of the requests.

#### 6. Evaluation Criteria:

- Benefit to residents of Taylor County.
- Number of residents who will be affected.
- Success of past grants to your organization
- Completeness of Application.
- Identification of needs and how funds will address needs.
- Collaborative relationships and matching funds (leverage)
- Monetary involvement of application principals
- Clarity and measurability of project's goals.
- Feasibility of the time frame given for completion of the project.
- Demonstration of ability to provide matching funds.
- Written bids or estimates for the project included with the application

#### 7. Grant Recipients' Responsibilities:

- Grantees receiving awards must sign Agreement Forms indicating their willingness to use the funds for the purpose requested, to file a final report upon completion of the project, to give Taylor County Endowment Foundation credit on all media releases, to allow the Foundation to use information or pictures of their project on the website or similar promotions and to return any portion of the grant monies not used for the designated purpose.

#### 8. Grant Process Due Diligence:

- The Taylor County Endowment Foundation requires proof of paid receipts showing payment of expenses, including photographs of completed projects. It is expected that all projects will be completed in the calendar year. Projects not completed within this timeline are required to contact the foundation with a written request for an extension of time accompanied by an explanation of what difficulties you are experiencing AND a new completion date. We understand that delays can happen – but we also want to ensure that the funds are used and projects are completed in a timely fashion.
- Projects not started by November 1, 2023 will forfeit their grant monies.

#### 9. Miscellaneous:

- Every effort will be made by the Board of the Taylor County Endowment Foundation to make the grant process as easy as possible. Questions should be directed to Dave Henry, State Saving Bank, 612 Central Avenue, Bedford, IA 50833 (712-523-2131) Cell (641-782-0852). or to Deb Miller – Iowa State Savings Bank, 200 N Main St, Lenox, IA 50851 (641)344-3095 or any Board Member.

**Grant Application Cover Page – 2023 Grants**

Applicant Requesting Funding/Fiscal Sponsor (If the organization is not a

501(c)(3): Organization conducting project (If different from Applicant/Fiscal

Sponsor:

Project Title: \_\_\_\_\_

Federal tax identification number of Applicant/Fiscal Sponsor - Use the TIN of the qualified organization

Applicant/Fiscal Sponsor Address:

Applicant/Fiscal Sponsor Contact Person & Title:

Applicant/Fiscal Sponsor Contact Person Phone & Email:

Organization/Project Address (if different):

Organization/Project Contact Person & Title (if different):

Organization/Project Contact Person Phone & Email (if different):

Total Cost of Project: \_\_\_\_\_ Grant Amount Requested: \_\_\_\_\_

Type of Request (check one)

- Program Based: Operational, activity, general programmatic support
- Capital Based: The building of or physical improvement of something

Project Focus Area (check one)

- Arts/Culture/Humanities
- Human Services
- Education
- Environment/Animals
- Public/Society Benefit

- Health
- Other

Description of Organization, your goals, and your major accomplishments:

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Brief Description of Project:

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**Questions of Purpose**

1. Describe the need or problem being addressed by this project.
  
  
  
  
  
  
  
  
  
  
2. Explain how this project will benefit the citizens of this county.

3. What area or population is being served?
  
4. Explain your organization's ability to carry out and ensure success of this project.
5. Describe the timeline of the project. A well planned project will have the estimated completion date detailed in the planning process.
  
6. Do you have funds on hand to complete the matching portion of the grant? If not, where will that money come from?
  
7. List individuals and organizations that will help your organization accomplish this project.
  
8. If your project is not funded by the Foundation, will you still proceed with it?
  
9. Have you previously received funding from Taylor County Endowment Foundation? If so, were those projects successfully completed? If not, why?
  
10. If, due to funding issues, your project can only be partially funded, would you still accept the grant and be able to complete the project? Why or why not? Add comments if you wish.

11. List any other information you feel would be beneficial in the understanding of your grant proposal.

**Project Budget**

**Income Sources**

**Source Amount**

Endowment Grant	\$
Funds on hand	\$
Fundraising projects:	\$
	\$
	\$
Other grants already awarded:	\$
	\$
	\$

**\*Total:**

**Expenditures – Provide Details of Project Costs**

**Items Amount**

	\$
	\$
	\$
	\$
	\$



	\$
	\$
	\$

**\*Total:**

**\*These two totals must be the same.**

At this time, the Foundation does not allow for an in-kind contribution in order to meet the matching requirements, however we do encourage involvement by volunteers. If applicable, please include a note about the number of volunteers you expect to have involved, as well as the number of hours and type of work anticipated.

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**Fiscal Sponsorship Agreement – (Required if applicant is not a 501(c)(3) or other qualified organization)**

**Fiscal Sponsor (Legal Applicant):** \_\_\_\_\_

**Fiscal Sponsor Contact Person and Email:**

**Fiscal Sponsor Full Mailing Address:**

**Sponsored Organization Conducting Project:**

**Project Name:**

The **Sponsor** has agreed to serve as a fiscal/program sponsor for the **Sponsored Organization** as outlined in the attached application and supporting materials. The Board of Directors of the **Sponsor** has passed a resolution

adopting the **Sponsored Organization's** project as a program or project consistent with the **Sponsor's** purpose and mission. The **Sponsored Organization's** financial activities will be accounted for as a program of the **Sponsor** for IRS auditing and financial reporting purposes.

Since the **Sponsored Organization** is not recognized by the IRS as a charitable tax-exempt entity, the **Sponsor** must exercise full control over the **Sponsored Organization's** financial administration, management and disbursement of funds resulting from this grant application. The **Sponsor** has delegated \_\_\_\_\_ as responsible for fulfilling of these accounting and reporting functions subject to the ultimate authority of the Board of Directors of the **Sponsor**. The **Sponsor** is responsible for ensuring completion of timely reports and submission of necessary financial statements to the Taylor County Endowment Foundation. Failure to insure timely reporting on behalf of the **Sponsored Organization/Sponsor** will also result in a loss of good standing.

This agreement will be in effect from the date of a grant award to support the above-named project until the grant funds are expended and the final report has been submitted and accepted.

We agree to the terms stated above in this agreement:

**Legal Applicant/Fiscal Sponsor Representative Signature:**

\_\_\_\_\_

\_ Printed Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Sponsored Organization Representative Signature:**

\_\_\_\_\_

\_ Printed Name: \_\_\_\_\_ Date: \_\_\_\_\_

**\*Attach to this agreement the Fiscal Sponsor's 501(c)(3) Tax-Exempt Determination Letter or comparable proof of charitable exemption. (i.e. a letter from a City, confirming their status as a government entity.)**

**Attachments**

In order to be considered for funding, your application **MUST** include the following items:

- Copy of latest Federal IRS tax-exempt status letter Only one copy needed. ○ List of Board of Directors and their affiliations
- **We place more emphasis on the budget for the specific project than on the finances of the organization.** The project budget should include specific info about the costs of your project as well as the source of your matching funds. (Financial info for your organization should be available upon request, but no longer needs to be submitted.) ○ **Written estimates or bids for the project should be included.**
- Signed fiscal sponsorship agreement (only if you are not a 501(c)(3) or component unit of government).
- Signed Board Approval from Applicant Organization (see below)

**Board Approval from Applicant Organization:**

We approve submission of this grant request and certify that the purpose of this request is charitable and that monies received from the Taylor County Endowment Foundation will be used solely for the project stated in this application.

\_\_\_\_\_ Board Chairman  
Date

\_\_\_\_\_ Project Head  
Date

**Taylor County Endowment Foundation – 2023 Evaluation Form**

**Upon completion of the project please return this form, along with evidence of the money spent and publicity for the project.**

**Please drop off at State Savings Bank**

**or mail to David Henry, %State Savings Bank, PO Box 68, Bedford, IA 50833**

**or email to [taylorcoendowment@gmail.com](mailto:taylorcoendowment@gmail.com)**

**Reports are due within 30 days of the completion of the project. Please note that you may not be able to apply for a new grant with a final report still outstanding.**

**Organization: \_\_\_\_\_ Project Name: \_\_\_\_\_ Total  
expenses for project (from attached copies of receipts) \_\_\_\_\_**

Briefly summarize your accomplishments. Were you able to attain the goals of your project? Please explain. Were there any unexpected successes/benefits?

Were there any unexpected barriers to overcome? What were they and how were you able to address them?

Do you plan to continue this project? If yes, will any of the past year's experiences cause you to change the project? If yes, how will the project be changed?

Describe the publicity, including any recognition of the Taylor County Endowment Foundation grant, on your project. Please attach copies. This year there are three options for including photos: 1. Printed photos may be submitted with your evaluation, OR 2. Digital photos may be emailed to [taylorcoendowment@gmail.com](mailto:taylorcoendowment@gmail.com), OR 3. Digital photos may be added to a “visitor post” on the Taylor County Endowment FaceBook page.

\_\_\_\_\_  
signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Project Manager