



The Community Foundation
FOR GREATER ATLANTA

Morgan Fund

The Morgan Fund of The Community Foundation for Greater Atlanta

2011 Guidelines

About Us

The Community Foundation connects donors, nonprofits, community leaders and others to strengthen the Greater Atlanta region through philanthropy. We believe in the power and potential of individuals and organizations to change communities, whether those communities are physical neighborhoods, a group of individuals with a common interest, or a cohort of organizations focused on similar issues. As a community foundation we play a variety of roles, but our key goal is to be the connecting point for various community groups to help us work together toward the common vision of a healthier, stronger Greater Atlanta region.

Our Philanthropic Framework

We have created our Philanthropic Framework to have a greater impact on the communities in our 23 county region. This framework guides us in all aspects of our work – from our services to donors, to our support of nonprofits, to our internal operations. Our aim is to be more creative and flexible in our work, continuously monitoring and incorporating new learnings, providing better service and creating more opportunities to encourage public participation around the issues most impacting our region.

The four goals of our framework are:

- **Engage our Community:** As philanthropists, people invest resources—financial, human and intellectual—individually and collectively to improve the well-being of our region. Philanthropists are knowledgeable and passionate about the issues affecting our community and the institutions addressing those issues.
- **Strengthen the Region’s Nonprofits:** A strong nonprofit region is a collaborative one made up of organizations that effectively manage operations and high-performing programs based on community need. This requires knowledgeable and capable staff, strong leadership, value for innovation, a clear vision and a plan.
- **Advance Public Will:** Individuals and institutions in the Atlanta region understand that the well-being of each community member is connected to that of every other. Community members address critical issues through accessible and collaborative debate, discussion, informed decision-making and targeted advocacy focused on public policy.
- **Practice Organizational Excellence:** The Community Foundation must build internal strength to have external community impact. This includes a financial focus on growing an endowment for the region as well as a staff and Board focus on supporting a diverse work environment that encourages l



OVERVIEW

The Morgan Fund, a Local Fund of The Community Foundation for Greater Atlanta, is awarding grants through a competitive process to help qualified non-profit 501(c)(3) organizations meet the changing needs of the Morgan County community. The Morgan Fund receives grant proposals and, following a three-step process of evaluation (review of Letters of Intent, review of Final Applications and site visits), awards grants based on identified community needs and the relative merit of proposals received.

The Morgan Fund publishes guidelines to help grant applicants understand the priorities and criteria and to help guide the Advisory Board in determining grant awards. Please read these guidelines carefully. Staff welcomes the opportunity to discuss proposed projects as well as answer any questions about The Community Foundation and the Morgan Fund.

Please Note:

The Morgan Fund's application process is separate from all other competitive grantmaking programs of The Community Foundation for Greater Atlanta. When applying for a grant from the Morgan Fund, the applicant must use the Morgan Fund application form. Submitting an application to the Morgan Fund does not disqualify an organization from applying for funds from other competitive grantmaking programs offered by The Community Foundation which include the Common Good Funds, the Metropolitan Atlanta Arts Fund, AIDS Fund, the Neighborhood Fund and Grants To Green. To learn more, visit our website for complete information on The Community Foundation's programs: www.cfgreateratlanta.org.

What types of support can organizations apply for? In 2011, the Morgan Fund will provide grants for general operating support.

What is general operating support? General operating support provides unrestricted funding to help support and maintain an organization as it pursues its mission. This type of grant is flexible and gives the grantee the ability to use the funds where they are most appropriate.

What is the range of grants? The Morgan Fund of The Community Foundation will award grants of up to \$5,000 for a 12-month period.

Are there program area priorities? The Morgan Fund does not give priority to any population or issue. It is our intent to support nonprofit organizations that are able to link their passions and missions with data and analysis, leadership and action. Our goal is to help support organizations that are building vibrant communities. The Morgan Fund has been and continues to be open to diverse issues. Successful applicants will be able to explain why their issue is critical to their local community or to the whole region, as well as demonstrate their effectiveness working with people, institutions and social issues.

How often can I apply for grant funding? Nonprofits can apply and receive grant funding for two (2) consecutive years. The nonprofit must sit out for a minimum of one (1) year before re-applying.

Funding Opportunities

The Morgan Fund will offer one funding opportunity in 2011 for grants:

October 7	Deadline for Letter of Intent to Apply for Grant Funding
November 22	Final Applications due (by invitation only)
Jan. 9 – Jan. 16	Site Visits conducted
Late February	Grants awarded

Application Process

- Organizations submit Letters of Intent to Apply for Grant Funding
- The Morgan Fund Advisory Committee and Foundation staff reviews all Letters of Intent and invites organizations to submit Final Applications
- Invited organizations submit Final Applications
- The Morgan Fund Advisory Committee and Foundation staff reviews all Final Applications and selects finalists to receive site visits
- The Morgan Fund Advisory Committee and Foundation staff members conduct site visits
- The Morgan Fund Advisory Committee makes funding recommendations to the Foundation's Board of Directors and grants are awarded
- Organizations receiving grants will be required to submit an end of grant report within 12 months of the grants being awarded

Eligible Organizations

Nonprofit organizations that meet the following requirements are eligible to apply for a grant from the Morgan Fund:

- Must be located **and/or** providing services within Morgan County; all funds from the Morgan Fund grants must be spent within Morgan County;
- Must be classified by the U.S. Internal Revenue Service under Section 501(c)(3) of the I.R.S. code as a nonprofit, tax-exempt organization, donations to which are deductible as charitable contributions under Section 170 (c)(2) and the I.R.S. determination must be current;
- Must be registered with the Georgia Secretary of State as a nonprofit;
- Must have filed the end of grant report for any previous Morgan Fund grant;
- Must have a Board of Directors where all members donate cash or make financially measureable in-kind contributions each fiscal year;
- Must have a Board of Directors with representation from the community served **and** committee structure that ensures the necessary mix of skills to succeed.
- If available, all applying organizations are encouraged to have a strategic or business plan for the whole organization that includes measureable goals and methods to assess effectiveness that covers at least two years (24 months). **If an organization is awarded a grant but does not have a strategic or business plan, the organization will be required to attend a class on the subject within six months of receiving the award.**
- If available, organizations with annual budgets up to \$99,999 are encouraged to have financial statements for the past fiscal year reviewed by an independent, certified public accountant. **If an organization is awarded a grant and does not have statements reviewed by an independent, public accountant, the organization will be required to attend a class on the subject within six months of receiving the award;** organizations with annual budgets between \$100,000 and \$250,000 must have financial statements reviewed by an independent, certified public accountant for the past completed fiscal year. All organizations with annual budgets **over** \$250,000, must have **audited** financial statements for the past completed fiscal year.

Special note to national organizations with local chapters/affiliates or programs: Preference will be given to local chapters/affiliates or programs that can demonstrate control over their finances and operations, and those that have a local governing board. Please contact Foundation staff if you have any questions.

Not Eligible for Funding

- Tuition or operating expenses for private, public and charter schools (K-12) and institutions of higher learning;
- Grants to individuals;
- Debt reduction or purchases or activities that occur **prior** to grant decisions;
- Organizations that have not filed end of grant reports for previous Morgan Fund grants;
- Projects that are typically the funding responsibility of federal, state or local government;
- Support for fundraising federations;
- Projects of a religious nature or that require participation in a religious activity as a condition for receiving services;
- Endowment funds;
- Capital campaign contributions (for building construction or renovation) or use of funds to cover capital campaign feasibility studies or campaign implementation expenses. This does not include regular maintenance and capital improvements.

How do I learn more about the Morgan Fund guidelines?

Staff provides an online orientation session for prospective applicants prior to the application deadline. While participation in an orientation session is strongly encouraged, it is not required. Please check our website for the date for the upcoming orientation session.

If you have questions after reviewing our materials and/or participating in an orientation session, please email us at morganfund@cfgreateratlanta.org.

Where do I find the application forms?

Applicants must use the Morgan Fund Letter of Intent and Final Application forms found on our website at www.cfgreateratlanta.org. Prospective applicants will also find Instructions for completing the Letter of Intent and the Final Application that include details on how to submit your Letter of Intent.

What Resources Can Nonprofits Access Through Nonprofit Effectiveness?

The Community Foundation's will provide resources for grantees' professional and organizational development. The Foundation has identified four primary focus areas for Nonprofit Effectiveness in 2011 – Strategic Planning & Business Analysis, Board Development, Fund Development Planning and Advocacy – all of which the Foundation recognizes as important skills sets in these economic times. Opportunities available to nonprofits include:

Nonprofit Scholarships

The Community Foundation recognizes that nonprofit boards and staff benefit from the opportunity to learn from field experts and from their peers through training, workshops and conferences; however, financial resources may not allow for organizations to take advantage of these opportunities as they arise. In order to support organizations and allow them to take advantage of these capacity-building opportunities, The Community Foundation supports organizational development through the provision of scholarships and access to learning opportunities and resources.

Scholarship opportunities are available for nonprofit staff and board members to attend professional and organizational development workshops and trainings.

Through this opportunity, The Community Foundation will cover the cost of attendance for workshops, trainings and conferences. Nonprofit organizations that received grants from any of The Community Foundation's discretionary grantmaking programs (Common Good Funds, Arts Fund, AIDS Fund, Neighborhood Fund, **Local Funds** and Grants to Green) within the last seven years and current year grantees may take advantage of this opportunity. The Foundation will post a list of classes and workshops for which scholarships will be made available on the website and regular announcements will be sent regarding upcoming opportunities. The Foundation will also consider support for courses, seminar series and conferences that have been self-identified by nonprofits. As part of the Foundation's goal of strengthening the region's nonprofits, priority will be given to applicants seeking to participate in courses, seminar series and conferences focusing on the four priority subjects offered by nonprofit organizations.

Additional details can be found on our website at www.cfgreateratlanta.org.