



About Us and Our Grant Making

On Tap for Today

1) What is a community foundation?

2) How charitable funds work at the community foundation

3) About our grant making funds, processes and schedules

A) Grant making process - review/selection timeline and criteria

B) Our new grant schedule for 2017

C) Details about our grant making funds: history, purpose, focus of grant making, range of grant awarded in 2015

i. Field of Interest funds

ii. Unrestricted funds

4) Foundation / Grants Q&A

Who's Who

- **Ken Fellman**
President, Kenosha Community Foundation Board of Directors
- **Robert Schneider**
Executive Director, Kenosha Community Foundation
- **Jane Harrington Heide**
Member - Foundation Board of Directors
Chair - Grants Committee
Member - Women's Fund Committee
- **Tom Targos**
Project Manager, Kenosha Community Foundation
Member – Scholarship Committee
- **Francisco Loyola**
Member - Kenosha Arts Fund Committee
- **Karen Kaiser**
Office Administrator, Kenosha Community Foundation

We are a Community Foundation

- We are one of over 700 Community Foundations in the US – all dedicated to serve our local areas *“For Good, For Ever.”*
- Founded in 1926, we were established by a group of community-minded citizens to provide charitable-minded individuals and organizations opportunities to create *permanent endowment funds* that are tax efficient and whose proceeds *benefit the community*.
- Income earned by endowment funds is to be used for *grants to not-for-profit providers* that can to address a wide variety of social, cultural, educational, and other charitable needs throughout in the city. *#GiveLocalKenosha*

Our mission is to help people enhance the present and insure the future of the Kenosha community.

How does a Community Foundation Work?

The following YouTube video helps answer the question:

https://youtu.be/cognB4M_Rtw

The Community Foundation's Three Main Functions

COMMUNITY FOUNDATIONS:

1. Community Foundations **accept donations** and create charitable funds.
2. Community Foundations **manage and invest the charitable funds** for growth and perpetual use.
3. With part of the income earned by the charitable funds, Community Foundations **distribute the funds into the community through grants to not-for-profit organizations and scholarships to students.**

KENOSHA COMMUNITY FOUNDATION:

1. In 2015, the Kenosha Community Foundation **received over \$303,000 in donations.**
2. As of Dec. 31, 2015, the Kenosha Community Foundation **manages over \$7 million in charitable fund assets.**
3. In 2015, the Kenosha Community Foundation **distributed over \$302,000 as grants to local not-for-profit organizations and scholarships to qualified students.**

*Source of data: 2015 Annual Report of the
Kenosha Community Foundation*

The Community Foundation is a collection of **charitable funds**.

- **Endowment Funds:**

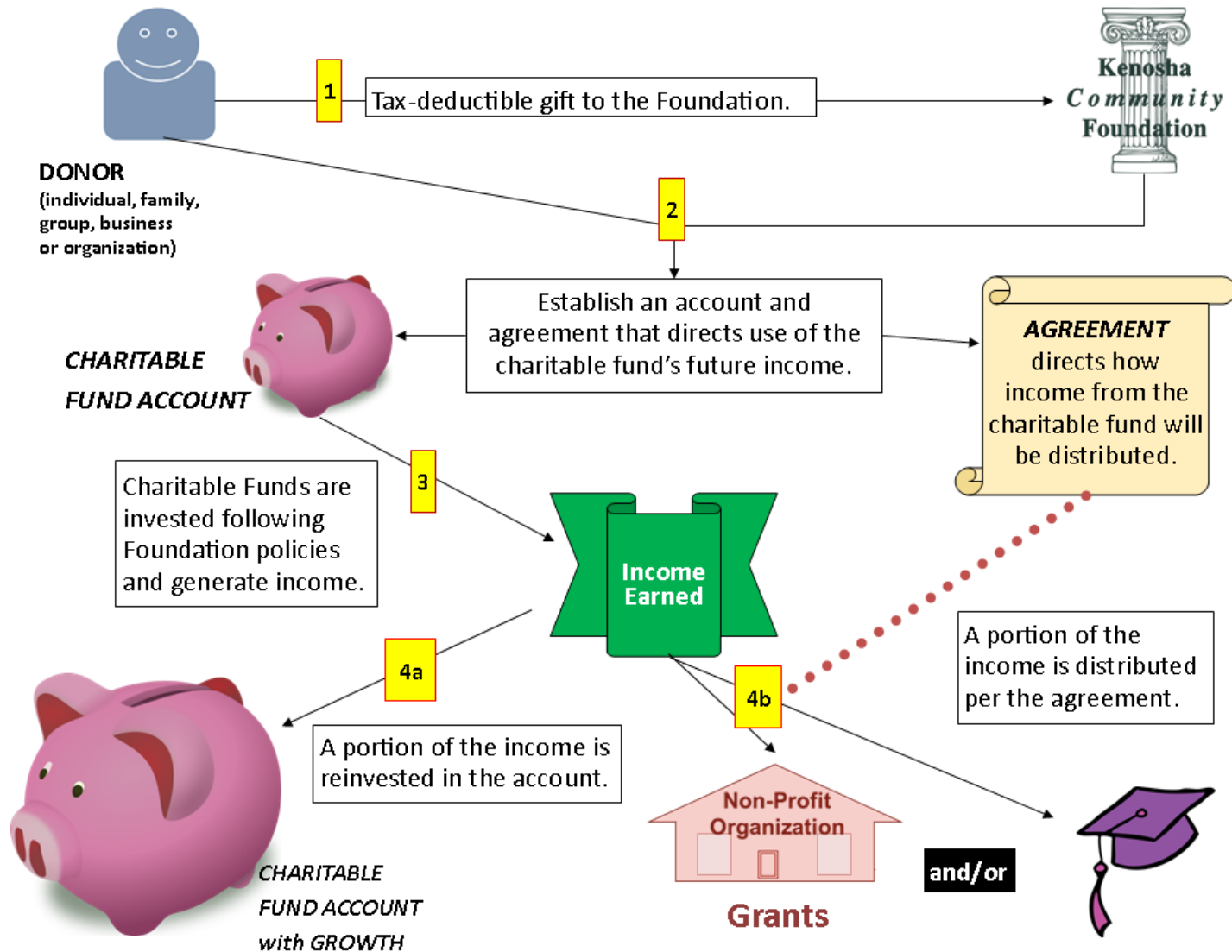
- ***Unrestricted*** - donors allow the Foundation to direct use of income from the fund
- ***Restricted*** - income from the fund is used to support a specific interest(s) specified by the donor
- ***Scholarship Funds*** (specialized restricted funds like the Mary Lou and Arthur F. Mahone Fund and the Foundation's Cropley Scholarship)
- ***Starter Funds*** (a way to start a legacy of giving for as little as \$600)

- **Donor Advised Funds**

- **Funds we manage for other organizations and projects:**

- *Organization Endowment Funds*
- *Fiscal Sponsorships*

How charitable funds work



Foundation Grant Making

1. Grants Awards determined by the Foundation's Board of Directors in consultation with committees of community volunteers

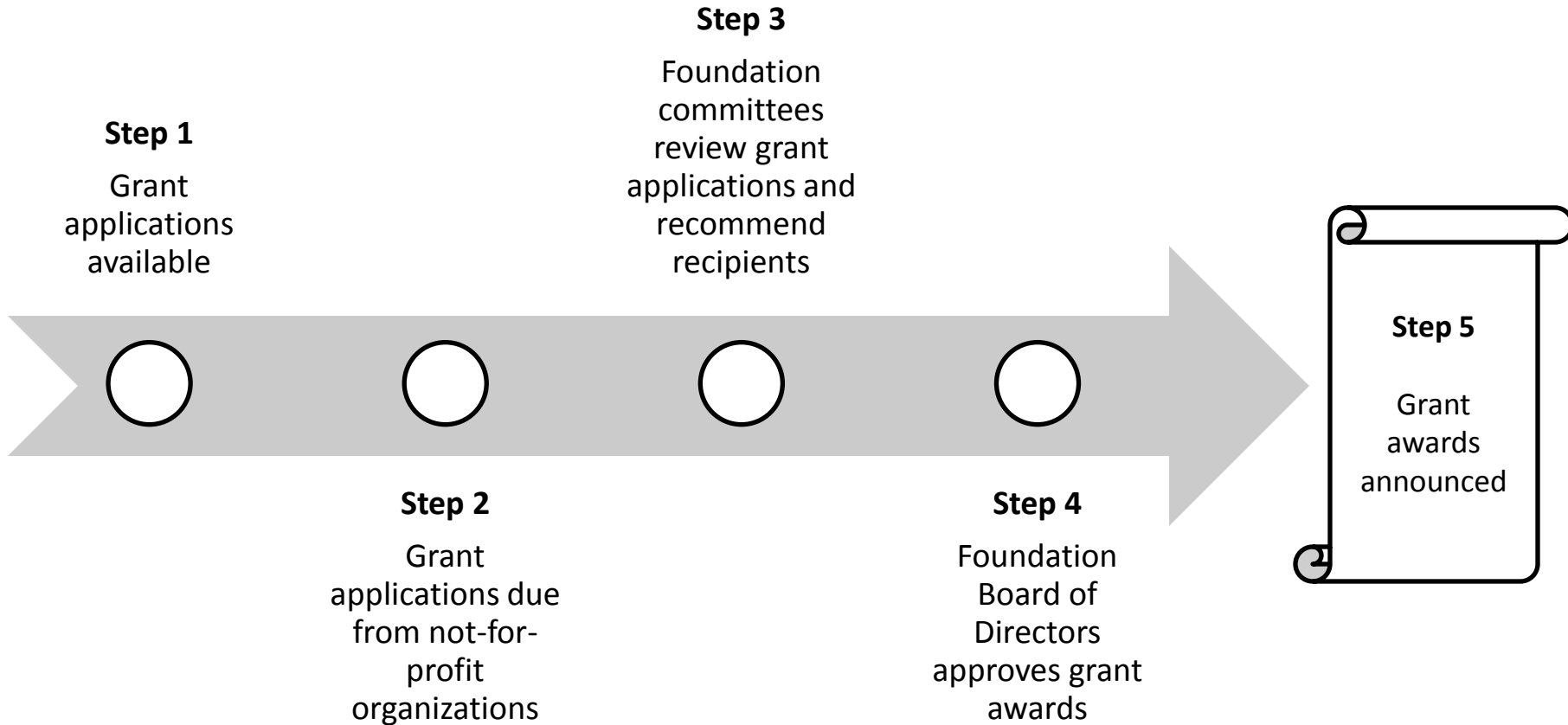
- Unrestricted Funds
- Field of Interest Funds:
 - The LaFave Family Fund
 - The OMC Legacy Fund
 - Kenosha Arts Fund
 - The Women's Fund



2. Grant Awards determined in consultation / by direction of the Donor(s)

- Restricted Endowment Funds
- Donor Advised Funds

Our Overall Grant Making Process



Grant Criteria used in Reviews

Is the information requested in the Application Form complete?

Does the proposal demonstrate the project's consistency with the organization's mission?

Are the number of beneficiaries to be served reported, and how?

Are expected outcomes of the project detailed?

Is there detail on the strategies to be used to achieve the outcomes?

Are details on organizational linkages and collaborations provided?

Are there details on how progress will be tracked and outcomes measured?

What is the frequency of progress reports?

Are plans detailed for obtaining other sources of funding if needed?

New for 2017 - Grant Making Schedule

Field of Interest Funds

LaFave Family Fund, OMC Legacy Fund, Women's Fund, & Arts Fund

Grant applications available
Now

Grant awards announced
January
2017

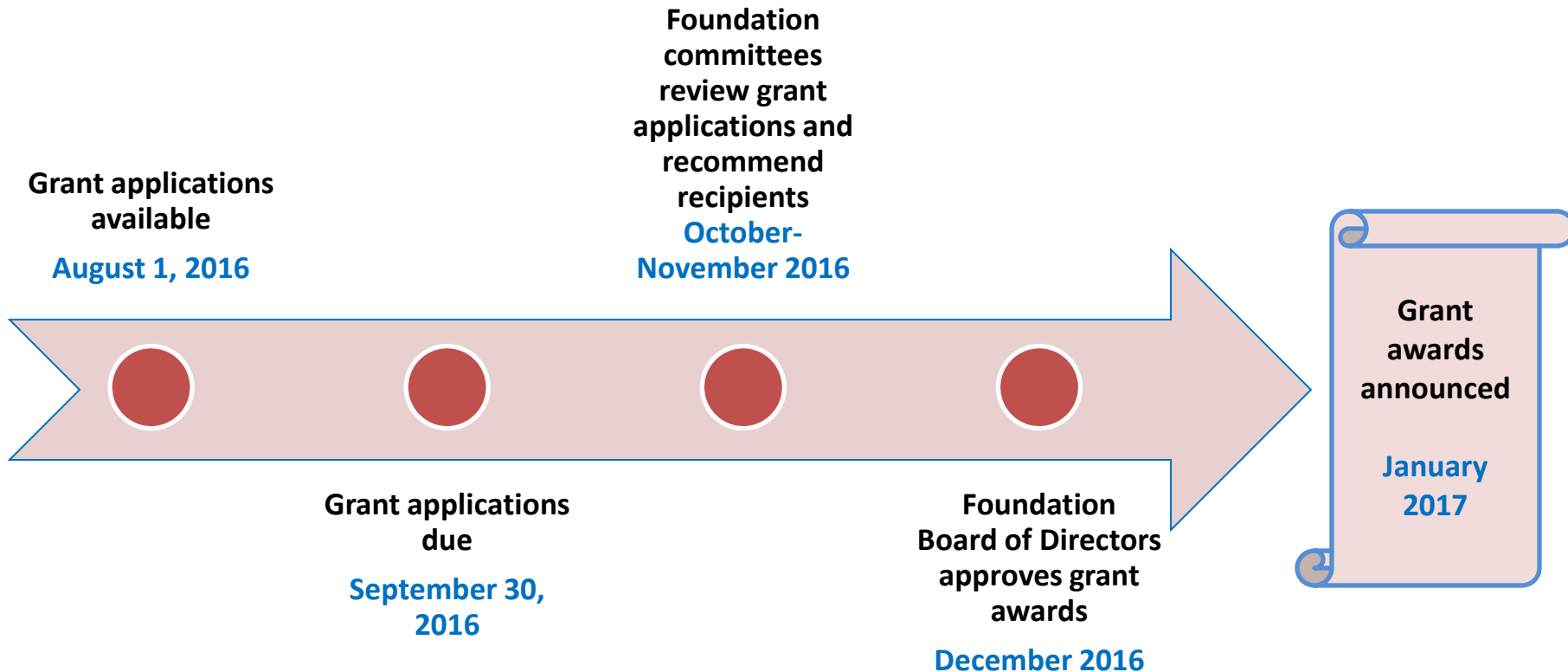
Unrestricted funds

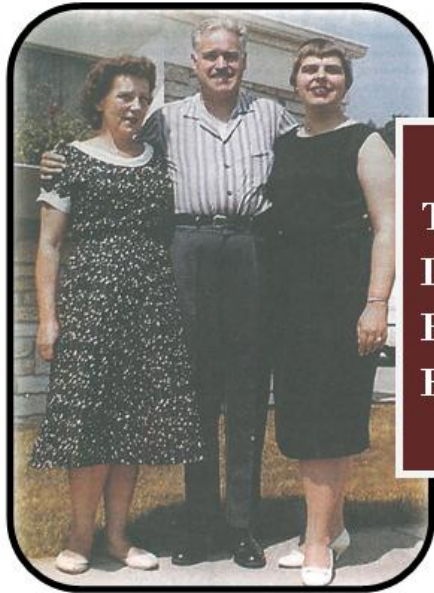
Grant applications available
January 2017

Grant awards announced
June 2017

Grant Making Timeline: **Field of Interest Funds***

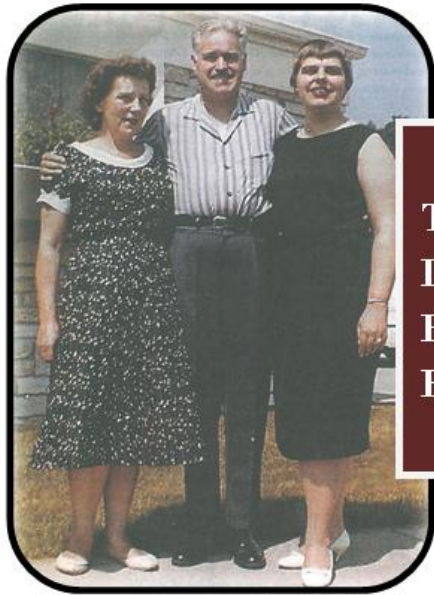
***LaFave Family Fund, OMC Legacy Fund, Women's Fund, & Arts Fund**





The
LaFave
Family
Fund

- Established in 2009 by the estate of former Bradford High School teacher Susann LaFave.
- The fund's grant making follows Susann LaFave's specific instructions:
*"I devoted my life to education, particularly to promoting **humanities, the arts, tolerance and communication** ...income (from the funds) shall be used to further these purposes, in perpetuity, including, in particular, **teaching and benefiting those who would promote a sense of tolerance and who would seek to end man's inhumanity to man.**"*
- Since 2011, the Foundation has awarded over \$105,000 in grants from the LaFave Family Fund.



The
LaFave
Family
Fund

Grant reviews
conducted by
the
Foundation's
Grants
Committee.

- **Focus of Awards:**
Programs that further education as well as promote the humanities, the arts, tolerance and communication.
- **Grants Awarded in 2016: 7**
- **Range of Grants (2016):**
\$1,800 - \$5,000
- **Average Grant (2016): \$2,850**

The
OMC
Legacy
Fund



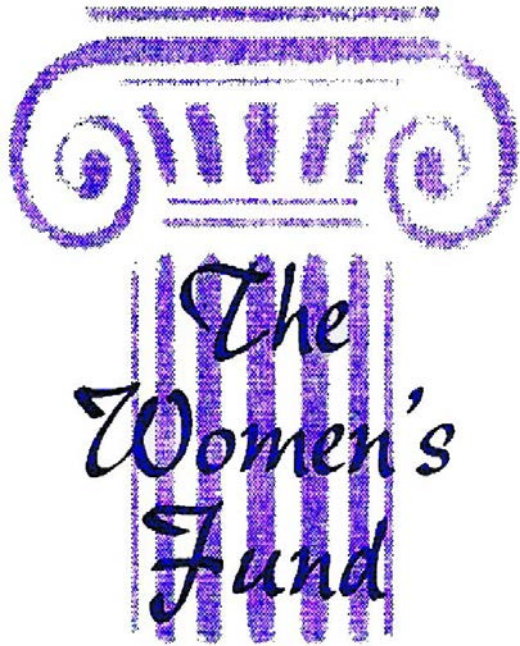
- In 2001, with the Outboard Marine Corporation (OMC) liquidation, its charitable foundation's assets were distributed to community foundations in SE Wisconsin.
- With its portion of the OMC charitable funds, the Kenosha Community Foundation established the OMC Legacy Fund.
- Since 2011, the Foundation has awarded \$45,000 in grants from the OMC Legacy Fund.

The
OMC
Legacy
Fund

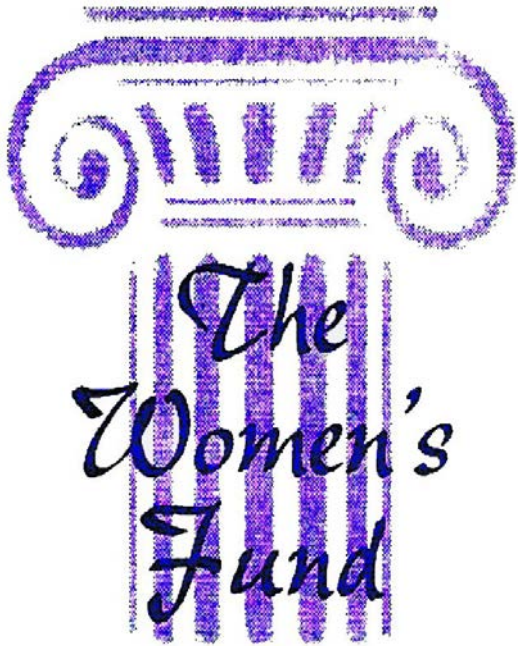


Grant reviews
conducted by
the
Foundation's
Grants
Committee.

- **Focus of Awards:**
Programs and activities that improve the general welfare and enhance the quality of life for youth in the Kenosha community.
- **Grants Awarded in 2016: 3**
- **Range of Grants (2016):**
\$1,000 - \$4,135
- **Average Grant (2016): \$2,750**



- Established by the Foundation as a component fund in 1997.
- The Women's Fund was the idea of a group of visionary Kenosha women, including Connie Ferwerda and Penny Enroth, dedicated to improving the well-being and quality of life of women and children in Kenosha County.
- Since 2011, the Foundation has awarded \$41,000 in grants from the Women's Fund.



Grant reviews conducted by the Foundation's Women's Fund Committee.

- **Focus of Awards:**
Programs and organizations that create opportunities for women and children in Kenosha County.
- **Grants Awarded in 2016: 8**
- **Range of Grants (2016):**
\$500 - \$1,500
- **Average Grant (2016): \$1,046**

ArtsFund

A component fund of the Kenosha Community Foundation

KenoshaArtsFund.org

- Established by the Foundation in the mid-1990 as a component fund.
- Annually awards grants to not-for-profit organizations for programs that enhance the culture, economy and quality of life in Kenosha.
- Since 2011, the Foundation has awarded \$13,500 in grants from the Kenosha Arts Fund.

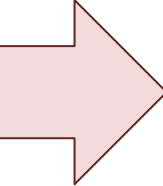


Sculpture Walk-Harbor Park is a project of the Kenosha Arts Fund.

SCULPTURE WALK
HARBOR PARK

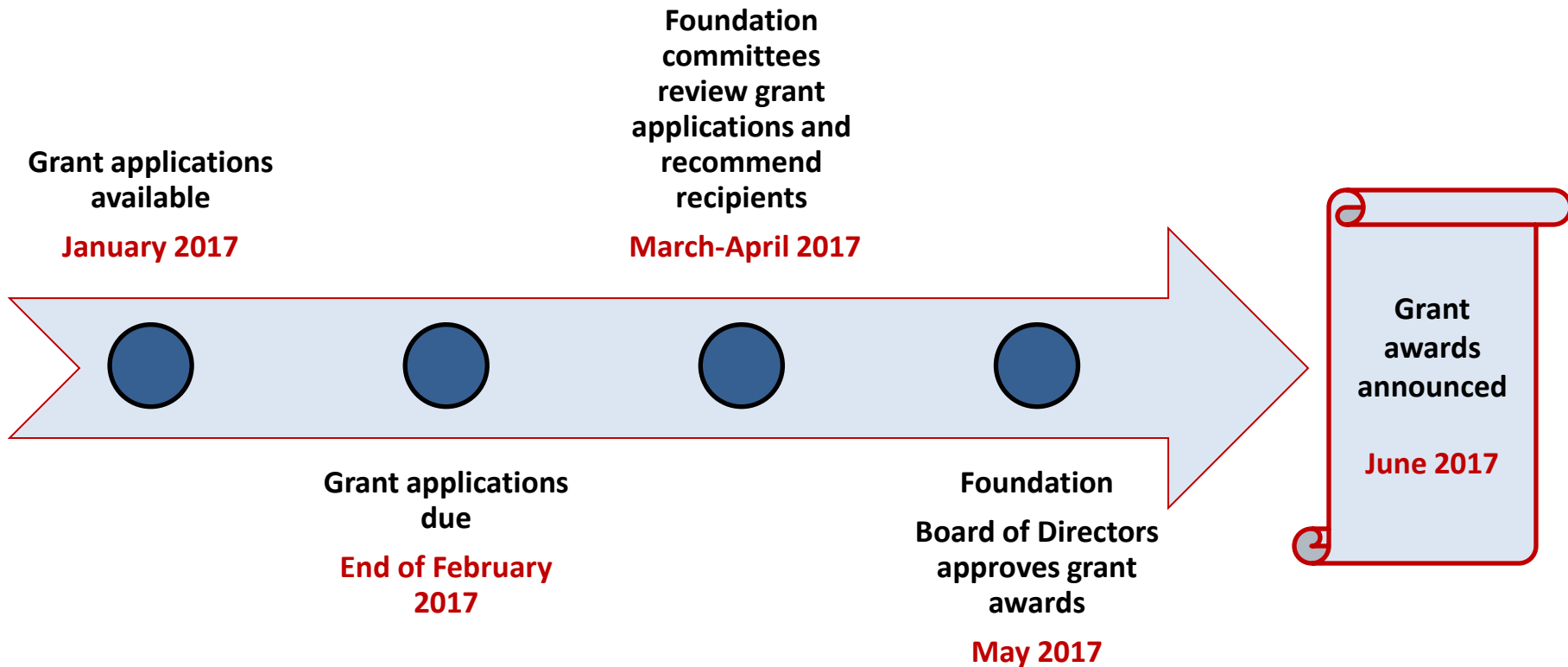


Grant reviews
conducted by
the
Foundation's
Arts Fund
Committee.



- **Focus of Awards:**
One or more of the following -
(a) Opportunities and creative initiatives for expanding art in Kenosha;
(b) urgent needs which sustain fledgling arts/cultural organizations or efforts;
(c) projects that have educational value.
- **Grants Awarded in 2016: 2**
- **Average Grant (2016): \$1,500**

Grant Making Timeline: **Unrestricted funds**





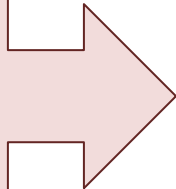
**Unrestricted
funds
at the
Kenosha
Community
Foundation**

- Each year the Foundation awards grants from the income earned by a **pool of named endowment funds that were established without restriction** – these include:
 - Advantage Bank Officers and Directors Fund
 - Mary Frost Ashley Endowment
 - Enroth Family Endowment
 - Jessie R. Hopf Endowment
 - Ralph and Frances A. Jaeschke Fund
 - A. Allan and Isabel M. Jankus Fund
 - Kenosha News Fund
 - Orvis Family Endowment
 - Kathleen Steumke Legacy Fund
 - Charles Vignieri Fund
- Since 2011, the Foundation has awarded over \$250,000 in grants from Unrestricted funds.



**Unrestricted
funds
at the
Kenosha
Community
Foundation**

Grant reviews
conducted by
the
Foundation's
Grants
Committee.



- Focus of Awards in 2016:
Each year, the Foundation's Board of the Directors determines the focus of grants awarded with the income from these funds.
- Grants Awarded in 2016: **9**
- Range of Grants (2016):
\$2,500 - \$10,000
- Average Grant (2016): **\$5,555**

Additional Questions?

The Panel:

- **Robert Schneider**
Executive Director, Kenosha Community Foundation
- **Jane Harrington Heide**
Member - Foundation Board of Directors
Chair - Grants Committee
Member - Women's Fund Committee
- **Francisco Loyola**
Member - Kenosha Arts Fund Committee

On Preparing a Grant Proposal (*A rant on grants*)

1. Read the Instructions - *all of them, make certain you can comply with all sections, understand the funder's purpose for giving out the grants*

Do we understand what the funder wants to support? Do we meet their requirements?

Does the funder want requests for projects or organization-wide (operational) funding?

2. Follow the Instructions - *use the form, fill it out correctly, follow the formats, do not make up your own form and formats, submit on-time*

Can we respond to / address all of what is requested by the funder?

3. Have a Plan – *have a project/program timeline, identify and address contingencies and risks*

What are the first things that we should do if/when we get the funds?

What do we do if we don't get this grant? What will we need to tell the funder about the project in the future?

4. Make sure the Submission follows the 3Cs: Clear, Concise, Complete - *edit / review the submission, have someone not close to the organization read it*

Are there any errors in the application?

Have we provided the funder with all the information that they are asking for?

Other Suggestions

- Write with your heart as well as with your head: *know what you want and how to explain it.*
- Be SMART about your proposal objectives: *Specific, Measurable, Assignable, Realistic, Time-related.*



- Scholarship funds are endowments established by a donor(s) specifically to offer higher education scholarship opportunities to local students.
- Scholarship awards, derived from the income of these endowment funds, are based on criteria established by their donor(s).

Highly Specific Criteria:

Scholarships are open to a very specific population of students, recipients recommended by a designated source (donor committee, school, church, etc.) – examples:

- Bradford High Class of '61 Scholarship (new)
- Manny Mitka Scholarship
- A. Allan and Isabel M. Jankus Scholarship
- Mary Louise Link Scholarship

More Competitive Criteria:

Scholarships open to wider population of students, recipients are selected based on established criteria and recommended by a committee of volunteers; examples:

