



# COMMUNITY FOUNDATION *of Northeast Alabama*

**CFNEA Summit Grant:** The purpose of the Summit Grant is to encourage short-term projects of (12 months) to provide advancement in community leadership development, training, and organization technology advancement, to strengthen not-for-profit organizations.

**Grant Parameters:** Grants from the Summit Grant are restricted to 501(c)(3) qualified public charities physically located and operating for at least one year in one of the Foundation's nine (9) county service areas (Calhoun, Cherokee, Clay, Cleburne, DeKalb, Etowah, Randolph, St. Clair, and Talladega). Each organization is eligible for one grant every three years. The Foundation welcomes grant applications that focus on the following areas:

## 1. Community Leadership Development and Training

- Local city council
- School boards
- Not-for-profit senior leadership staff
- Not-for-profit board
- County commission

## 2. Organizational Technology Advancement

- Improve gifts and donor tracking systems
- Improve ability to work remotely
- Update current technology
- Improve financial tracking system
- Improve cyber security

**Funding Restrictions:** In compliance with federal regulations and Community Foundation policies, the following types of grants will not be considered or funded:

1. Organizations that have discriminatory policies and/or practices based on race, color, national origin, age, disability, sex/gender, marital status, familial status, parental status, religion, sexual orientation, genetic information, or political beliefs;
2. Organizations with no 501(c)(3) IRS status unless you are a government/state agency;
3. Organizations on the National Charity Watch List;
4. Grants for dinners, fundraising, and marketing events;
5. Grants to endowments or other discretionary funding pools;
6. Grants for capital campaign contributions (for building construction) or use of funds to cover capital campaign feasibility studies or campaign implementation expenses. This does not include regular maintenance;
7. Grants for prizes, awards, and scholarships;
8. Grants requesting over \$10,000;
9. Grants for entertainment expenses;
10. Grants for lobbying-related expenses;

11. Grants for event sponsorships;
12. Organizations that do not have a physical location in one of the nine-county service areas;
13. Organizations that do not serve residents in our 9 county service area;
14. Grants to organizations operating for less than one year;
15. Grants to individuals;
16. Grants to religious organizations for religious purposes;
17. Grants to organizations for projects outside CFNEA's nine (9) county region;
18. Grants for political purposes or to influence elections; and
19. Organizations that have an existing/open grant from the Foundation may not apply for a new grant within the same fund until the current grant documentation is completed and closed. For a grant to be considered completed and closed, the not-for-profit partner must have successfully submitted their Final Grant Report.

**Funding Duration:** Grant activities supported by the Summit Grant award may be sustained for one year, after the date the award is announced.

**Approved Funding Areas:** The following are examples of areas of funding available for community leadership development, training, and organizational technology advancement. If your request includes an area not covered on this list please contact the Director of Scholarships & Grants at [lcortner@cfnea.org](mailto:lcortner@cfnea.org) or 256-282-1381 ext. 24.

1. Professional program trainers for approved training
2. Tuition/registration, mileage, and lodging to attend conferences, workshops, courses, or trainings
3. Training curriculum
4. Technical software and hardware
5. Technical support for new software installation and upgrades
6. Technology to support technological upgrades
7. Gift and donor tracking systems
8. Financial tracking system
9. Cyber Security software

**Grant Requirements:** Applicants will agree to complete a CFNEA grant agreement, mid-year, and final report. Applicants will also agree to attend a yearly leadership summit where they will present the impact their grant award has had in their community and for their organization. Individuals receiving training must attend the leadership summit.

**Eligibility Requirements:** Organizations that meet the following requirements are eligible to apply for a grant. All five (5) requirements must be met.

1. Organizations classified by the U.S. Internal Revenue Service under Section 501(c)(3) of the I.R.S. code as a not-for-profit, tax-exempt organization, donations which are deductible as charitable contributions or a governmental/state or county agency;
2. Organizations with a minimum one-year operating history after the date of receipt of its 501 (c)(3) classification;
3. Organization must have a board approved current written strategic plan for the whole organization that covers at least 24 months which includes the organization's entire current fiscal year and the following:

- Mission statement;
  - Strategic goals and measurable objectives.
4. Organizations with revenues over \$200,000.00 must submit an audited financial statement for a complete fiscal year. Organizations with an operating budget between \$50,000.00- \$199,999.00 must submit the most recent audit review or compilation. Organizations with an operating budget of \$50,000.00 and below do not have to submit any audited documents.
  5. Eligible organizations are invited to apply for a grant from any fund of the Foundation accepting applications (both grant cycles) as long as you do not have an open grant with the particular fund you wish to apply to.

**Application Process:** To be eligible to apply for a grant from CFNEA, all not-for-profit organizations (NFPs) must submit a pre-application and, after CFNEA approval, a grant application.

**Pre-Application:** The pre-application must be submitted online through CFNEA's website at <https://www.cfnea.org/receive/grants-toolkit>. You will receive a response via e-mail within two weeks of receipt of your completed pre-application, directing you to proceed or notifying you that your pre-application is incomplete or not approved. All interested NFPs must upload the required documents to be considered.

**Pre-Application Required Documents:** The pre-application will be deemed incomplete if any of the following documents are missing. **Please upload the following documents:**

1. A copy of your most recent IRS letter of determination or if you are a city, county, state or federal government agency, and your tax or affiliation letter signed by the appropriate supervisor or financial officer.
2. Current Board of Directors' list.
3. Strategic Plan (for at least 2 years)
4. Budget to Actual YTD operating budget through the end of your current fiscal year printed directly from your accounting software. Excel spreadsheets will not be accepted.
5. Most recent audited Financial Statement or accounting review.

**Grant Application:** After your pre-application has been approved, you must submit your grant application online through CFNEA's website at <https://www.cfnea.org/receive/grants-toolkit>. If the due date falls on a holiday or weekend, the due date is extended to the next business day. Applications are reviewed for completeness. Any application deemed incomplete will not be accepted.

**Grant Application Required Documents:** The grant application will be incomplete if any of the following documents are missing. **Please upload the following documents:**

1. Logic Model (Template can be found on the Foundation's grant page on the website)
2. Grant Budget (Template can be found on the Foundation's grant page on the website). Please include in the comments column an explanation of each income and expenditure, with details on how you arrived at that number.
3. If you are submitting a collaborative grant application with a funding partner(s) having a significant and or financial role in the project, please attach a letter of support from them with your application. No general letter of support will be accepted.

A confirmation e-mail will be sent regarding the application status. Funding recommendations from the Grant Review Committee are made to the Foundation's Board of Trustees. Decisions are final with no appeal. Following the board's approval, applicants will be notified by email of award decisions.

**Application Review:** Grant Review Committee will evaluate grant applications on a numerical system with points ranging from 0-100. An application must score 70 and above to be considered for funding. (**Funding is not guaranteed if the applicant scores above a 70.**)

**AWARD AND REPORTING PROCEDURES:** Grant awards under \$3,000.00 will receive 100% of the award amount upon receipt of the signed grant agreement. The final report must be submitted online through the grant portal.

Grant awards of \$3,000.00 or more will receive 50% of the award amount upon receipt of the signed grant agreement. A semi-annual report must be submitted online through the grant portal.

After this step is completed, the remaining 50% of the award amount will be disbursed. Failure to submit a semi-annual report will result in the forfeiture of the remaining grant award. The final report must be submitted on-line through the grant portal.

**Failure to submit a final grant report will result in your organization being ineligible to apply for another grant from the Foundation.**

**Contact:**

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