GUSTAVUS ENDOWMENT FUND GRANT (EFG)

APPLICATION PACKET

IMPORTANT DATES

Grant Applications Open	**July 1st**
Applications Submitted to City for Review	~~October 31st before 4pm~~ **Sept. 30**
EFG Advisory Committee Established	**October General Meeting**
City Preliminary Review Complete	**October 14th**
Completed Application Due	October 31st
EFG Advisory Committee Meeting	**TBA**
Applicants to meet with EFG Advisory Committee	**TBA**
Committee meets with City Council	**Dec. Work Session**
	(1st Tuesday in December)
Awards Announced and Funded	**Dec. General Meeting**
	(2nd Tuesday in December)
Grant Period Begins	**January 1st**
Grant Completion & Final Report Due **Following Year**	December 31st

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ELIGIBILITY REQUIREMENTS

Grants may be awarded to city departments, **local** non-governmental organizations or other local entities. To be eligible, the applicants:

1. Must be **local, domiciled** ~~Gustavus~~ **resident(s)** of Gustavus
2. Must not be delinquent on any City taxes, forms or payments
3. ~~Must be at least sixteen years of age at least one of the project's administrators)~~

3. ~~d.~~**At least one (1) of the project's administrators must be at least eighteen (18) years of age.**

4. ~~e.~~Must be proposing a ~~discrete~~ **single, specific** local project **that benefits the community of Gustavus.**

5. ~~f.~~**Fund grants Grant funds shall not be made for operating expenses of the City or other organizations.**

6.~~g.~~**Grant Funds shall not be** ~~made for~~ **awarded to for-profit enterprises although a non-profit organization may contract with a for-profit for services.**

7. Projects must be completed by the end of the next calendar year (unless an extension is granted) and applicants may not receive an Endowment Funt Grant (EFG) for more than three (3) consecutive ~~years~~ **funding cycles.** ~~Effective the calendar year, the Grant must be used within one calendar year of award.~~

FUNDING AVAILABILITY

1. A total of $ _____ is available for this grant year. Applicants may request up to the total amount.
2. EF funds are **usually** paid via a reimbursement process or direct to **a** third-party. **Payment may be made in advance directly to the applicant. Please contact the Treasurer regarding required documentation.**
3. Funds must be spent prior to the expiration of the grant period, unless an extension has been granted.

HOW TO APPLY

1. An outline for the grant application is attached and may also be found on the City website at https://cms.gustavus-ak.gov. Sample applications may also be found on the website.
2. Completed applications, including any supporting documents such as letters of support, must be submitted to the City ~~Grant~~ Administrator **or City Treasurer**: treasurer@gustavus-ak.gov no later than 4:00 p.m. on ~~October 31st~~ **September 30th for a Grant Application Preliminary Review.**
3. **The** preferred ~~process for~~ application **format** ~~submissions~~ is typed, PDF format, and emailed **to the City Treasurer**.
   By October 14th, the City ~~Administrator and Treasurer~~ **will return your application by email with any suggested recommendations for meeting the eligibility criteria.**
4. **The cut-off for final submission of all applications is October 31st. Please submit your final draft of the application to City Hall by that date. In the first week of November, applicants will receive an email confirming receipt of their application**
5. **An Advisory Committee of community members will review your application. You will be notified about the date and time for the Committee meeting. Please attend either in person or virtually. You will be given five (5) minutes to present your project and answer any questions. Applicants who are unable to attend due to special circumstances may request a separate meeting with the Advisory Committee to present their project.**
6. ~~In the first week of November, Applicants will receive an email confirming receipt of their application and eligibility determination.~~

SELECTION PROCESS

Proposals will be scored by the Advisory Committee, consisting **of 3-7 community members and the City Treasurer who will serve in an advisory capacity. Scoring will be** based on the following criteria**:**

Project Description and Need (Out of 50 total points)

Well defined need for project (0-11 pts)
Broad community benefit and definition of who benefits (0-10 pts)
Link to City Vision Statement (0-5 pts)
Description of why the project is needed now? (0-2 pts)

Defined objectives with milestones that demonstrate progress (0-8 pts)
Realistic and achievable timelines (0-7 pts)
Success of the project is defined and realistic (0-3 pts)
Obstacles are defined and accounted for (0-2 pts)
Are the project's benefits long-lasting? (0-2 pts)

Budget (Out of 25 total points)

Well researched and explained (0-15 pts)
Detailed and comprehensive expenditures (0-7 pts)
Considers matching funds partnerships and possibility of partial funding (0-3 pts)

The average of the Committee member's total scores will be the application's final score from the Committee. Proposals must receive a **final** score of at least 50 points to be considered for the award.

~~In early November, A~~applicants with qualifying applications will be invited via email to a special November work session where Work Group members might ask clarifying questions of the A~~applicant. Applicants are encouraged to attend (ideally in person, though audio teleconference~~ **virtual attendance** ~~is also available) and be prepared to respond to council~~ **committee member** ~~questions. Each a~~Applicant will be given five minutes to give a short presentation of their project. Applicants who are unable to attend due to special circumstances may request a separate meeting with the Work Group to present their project.~~

The ~~EFG Work Group~~ committee will present their recommendations to the full Council at the December <u>Work Session</u>. Applicants are encouraged to attend this meeting. **present your project (5 minutes)** ~~and to answer any questions the full council may have.~~ **If there are not questions for the Applicants, it will just be a listening session for the Applicants.**

The full council will vote to award funding at the December <u>General Meeting</u>. **If the council wishes to re-evaluate the recommendations of the Committee, they must use the same Scoring Criteria as the Committee.**

Final Council selection and award of grant funding will take place at the General Meeting the 2nd week of December.

APPLICATION MODIFICATION

Minor grant modifications that do not alter the goal of the project or cause expenses to exceed the awarded total will be considered. All modifications should be submitted to the City Administrator.

REPORTING

a. Grant recipients are required to submit monthly progress reports until the final report is submitted. A final report is due by December 31st **of the following year.**
b. A monthly progress report form will be included with the award letter. Monthly reports should describe the progress being made such as milestones met, objectives achieved, expenditures to date, etc.
c. The final report will include a narrative of the project, copies of any materials or pictures the project team wants to share, the number of people ~~reached, or~~ served, by the project or its various elements, and a description of the project's outcomes. This report will be shared with the public.
d. Ten percent (10%) of the grant funds will be withheld until the final report is received**, unless the Treasurer has granted an exception**.
e. Unused materials, equipment, or items not used for the project purchased with grant funds, will require immediate reimbursement to the City.

(Year) Endowment Fund Grant

Application Outline

1. **Project Summary (1-2 paragraphs)**
   Total Amount Requested $_____
   Give a brief, general description of how the funds will be used.
2. **Brief Overview of Organization or Entity** (1-2 pages)
   Provide details of your organization or group including:
   a. Contact Information and Tax ID
   b. Identification and qualification of key personnel involved with implementing the project
   c. Organization's or group's relevant experience with the project
   d. Partnerships and relationships with other key organizations or people involved with the project.
3. **Project Description (1-2 pages)** (Selection criteria – up to 25 points)
   Explain the project using the following sections:
   a. Problem Statement describe the need for the project including supporting documentation.
   b. Community Benefit – describe how this project will benefit Gustavus and its citizens. Who will it serve?
   c. Link to City's Goals – does this project tie in to the City's defined goals as stated in the Strategic Plan. How?
   d. Concluding Statement – summarize why this project should receive funding and why now? Have you demonstrated that you have the ability to **can** effectively manage the project?
4. **Project Goals and Objectives** (1-3 pages) (Selection criteria – up to 25 points)

   Provide a timeline for the project. Include milestones with dates you intend to use to track progress for each goal, objective or action as appropriate. Identify required funding for each section of the project's development. How will success to measured? What activities, services or capital will result? What are the obstacles (besides funding)?

5. **Budget** (1-2 pages)   (Selection criteria – up to 25 points)

   Narrative – Provide 1-2 paragraphs describing funding partnerships, intended match use, other avenues of funding that have been explored, revenue generating aspects of the project and disposition of revenue, and strategy for funding project elements such as reimbursement, need for advance payment, etc.

   Partial Funding – There is often not enough money available to fully **fund** all approved applications. If your proposal was partially funded, could you still be successful in any aspects of your project?

   Budget Detail – Utilizing a Table or Spreadsheet, provide an itemized list of expenditures and the source(s) of purchase that will be funded by the requested grant, and how much match (funding from other sources). Group and prioritize in consideration of partial funding.