



Grant Implementation Guide

This guide is provided as a reference to answer common questions about grants from Central Indiana Community Foundation, its affiliates and funds. All grant-related correspondence and questions should be directed to the Grants Officer assigned to your grant.

1. Financial

A. Grant Number

For future reference, each grant is assigned a grant number (see grant award letter). Please refer to this number in any grant-related correspondence.

B. Obtaining Payment

Payment timelines and stipulations are outlined in the grant award letter. Some payments may be contingent on the attainment of certain goals rather than made on specific dates.

If the award letter specifies payment dates, the Foundation will process your electronic payment near those dates. If the payment is based on reaching a certain goal or other stipulations, proof of meeting those requirements must be submitted in writing to your Grants Officer. Please allow three weeks following that submission for the processing of your payment.

C. Documentation of Matching Funds

The Board of Trustees of Central Indiana Community Foundation, The Indianapolis Foundation and Legacy Fund Community Foundation will frequently impose a matching requirement so that you can use the Foundation's grant as leverage for new gifts or increased gifts from current donors. Therefore, matching funds must be new money raised and received specifically for the granted project during the time period outlined in your grant letter.

For all grants requiring a match, qualifying matching funds must consist of irrevocable contributions of cash or equivalents (e.g. stocks or bonds) or property. Qualified matching funds for endowment-building grants may also consist of irrevocable designations to your permanent endowment fund from charitable gift annuities, charitable remainder trusts and charitable lead trusts.

The Foundation does not match pledges or in-kind donations unless allowed in your grant letter. All contributions will be matched on the basis of their gift value as determined by applicable United States Treasury regulations.

Reporting your match

Your report indicating you have raised your required matching funds should consist of a letter restating your matching terms and indicating the total amount you are requesting from the Foundation. You should attach firm documentation of the matching funds such as copies of checks from donors or grant letters from foundations, government agencies and corporations. For Foundation grants under \$50,000, gifts under \$100 may be listed on a spreadsheet indicating the name of the donor, amount received during the matching period, nature of the contribution (cash, planned gift or in-kind) and date of the gift. For grants \$50,000 and over, gifts under \$1,000 may be listed in a similar spreadsheet. Please allow three weeks following that submission for the processing of your payment.

Valuation of in-kind match

If your grant letter allows an in-kind match, please follow these accounting guidelines:

- Donated **materials** should be reported at their fair market value if you have an objective, measurable basis for assigning value. The donor will usually assign a value to the gift.
- Donated **services** should be reported if: they are a normal part of the project and would be otherwise performed by paid personnel; the grantee exercises control over the employment and duties of the donor; and there is a measurable basis for assigning a value to the services being donated.
- The following **cannot** be claimed as in-kind services: Direct services designed to be provided by volunteers, periodic volunteer services for fund raising and time spent by board members, and board committees in carrying out governance activities.

D. Purchasing and Procurement

Central Indiana Community Foundation has no rules or requirements regarding the purchase of materials or equipment, or procurement of professional services. However, the Foundation encourages procurement of professional services through competitive negotiation to ensure quality work and best pricing.

Unless otherwise noted in your award announcement or grant agreement, all real estate, equipment and materials purchased with Foundation funds become the Grantee's permanent property. If the Grantee nonprofit is legally dissolved, its assets should be transferred to another nonprofit with a similar mission, in accordance with IRS regulations.

E. Modification

Modifications to the funded project's intent, the grant period, and budget amounts must be approved by the Foundation. Significant variations may require the Foundation board's approval. Approval of modifications should be requested in writing. Modifications under the lesser of 10% of the total grant amount or under \$10,000 do not require Foundation approval.

F. Close-out of Grant

Unless otherwise modified by your Grants Officer, after the Termination Date of your agreement, any undisbursed money dedicated to your grant will revert to the appropriate Foundation fund, and the grant agreement and grant will be automatically closed out.

G. Record Keeping and Accounting

You are required to keep financial records with respect to a grant, along with any reports submitted to the Foundation, for at least two years following the termination date of the grant.

2. Reporting

A schedule for submitting reports is provided in your grant award letter. Reports should be submitted to grantreports@cicf.org.

- Grants for **library collection development** should use the **2012 Library Fund Collection Enhancement Form and be uploaded to Bravelo**.

Any form may be re-created in your word processing program as long as the format can be generally retained. The final report should include a full accounting (non-audited) of how Foundation funds and any matching funds were spent. An easy accounting format would be a simple itemization of project-related revenues and expenses.

3. Recognition

A. Guidelines

The Central Indiana Community Foundation, its affiliates and funds have recently instituted new policies and procedures with regard to marketing and public relations. Though it is not the Foundation's intent to place an excessive burden of time or expense upon grant recipients, we hope that as our partners in philanthropy you will be as generous as possible in meeting the expectations listed below.

Please call the Marketing & Communications Department at 317-634-2423 with questions related to these expectations or with new ideas about how you can recognize the Foundation's support.

Logos may be downloaded from www.cicf.org (Select "Media Resources" from the "Learn" menu). For questions regarding logos, please contact Julie Wright at 317-634-2423 x558 or juliew@cicf.org.

Expectations:

- Recognition equivalent to that which you offer corporate or private donors at a similar level.
- Press releases announcing receipt of the grant. You may wish to include Foundation recognition in any previously planned press releases related to the project for which the grant was made.

Press releases mentioning the support of **Central Indiana Community Foundation, its affiliates and funds** should be faxed to 317-684-0943 or e-mailed to keris@cicf.org.

- Exposure in your newsletter, on your website including any video pieces you would like us to integrate into our website, and any other printed materials including advertising and/or annual report.

B. Sample language about Central Indiana Community Foundation, its affiliates and funds

Below is sample language for how to recognize each of the funding sources of the Central Indiana Community Foundation:

	<p>Any listing of this award in a publication or other printed material should identify it as a grant from the "Efroymson Family Fund, a CICF Fund."</p> <p><u>Sample for print, radio, television or World Wide Web:</u> Sponsored by the Efroymson Family Fund, a fund of Central Indiana Community Foundation, inspiring philanthropy.</p>
	<p>Any listing of this award in a publication or other printed material should identify it as a grant from "Legacy Fund, a CICF Affiliate."</p> <p><u>Longer version for print:</u> Legacy Fund, a CICF Affiliate makes grants to charitable organizations and provides leadership to address community needs. It provides public-spirited donors a vehicle for using their gifts and bequests in the best possible way now and in the future as conditions in our community inevitably change.</p> <p><u>Sample for print, radio, television or World Wide Web:</u> Sponsored by Legacy Fund, an affiliate of Central Indiana Community Foundation, inspiring philanthropy.</p>
	<p>Any listing of this award in a publication or other printed material should identify it as a grant from "The Indianapolis Foundation, a CICF Affiliate."</p> <p><u>Longer version for print:</u> The Indianapolis Foundation, an affiliate of Central Indiana Community Foundation, is a community foundation supported by gifts and bequests from a variety of donors. It was created in 1916 to: ensure that the quality of life in Marion County continuously improves; help where needs are greatest and the benefits to our community are most substantial; and provide public-spirited donors a vehicle for using their gifts in the best possible way now and in the future as conditions in our community inevitably change.</p> <p><u>Sample for print, radio, television or World Wide Web:</u> Sponsored by The Indianapolis Foundation, an affiliate of Central Indiana Community Foundation, inspiring philanthropy.</p> <p><u>Field of Interest funds:</u></p> <p>The Indianapolis Foundation also makes grants on behalf of donors who have established Field of Interest Funds. Awards from such funds should be recognized as a grant from:</p> <p>"<insert name of fund>, a Field of Interest Fund of The Indianapolis Foundation."</p>
	<p>Any listing of this award in a publication or other printed material should identify it as a grant from "The Library Fund, a fund of The Indianapolis Foundation."</p> <p><u>Longer version for print:</u> Administered by The Indianapolis Foundation, the Library Fund was established in 1989 to assist the development of eligible</p>

 <p>The INDIANAPOLIS LIBRARY FOUNDATION FUND A CICF Affiliate Inspiring philanthropy</p>	<p>high school, public and academic libraries in Marion County. Advised by representatives from those libraries, the Foundation has provided nearly \$10 million to develop collections, update technology, and improve access by all Marion County residents to quality information services.</p>
 <p>CENTRAL INDIANA SENIOR FUND A CICF Fund Inspiring philanthropy</p>	<p>Any listing of this award in a publication or other printed material should identify it as a grant from the “Central Indiana Senior Fund, a CICF Fund.”</p> <p><i>Sample for print, radio, television or World Wide Web:</i> Sponsored by Central Indiana Senior Fund, a fund of Central Indiana Community Foundation, inspiring philanthropy.</p>
 <p>The GLICK FUND A CICF Fund Inspiring philanthropy</p>	<p>Any listing of this award in a publication or other printed material should identify it as a grant from “The Glick Fund, a CICF Fund.”</p> <p><i>Sample for print, radio, television or World Wide Web:</i> Sponsored by The Glick Fund, a fund of Central Indiana Community Foundation, inspiring philanthropy.</p>
 <p>WOMEN'S FUND OF CENTRAL INDIANA</p>	<p>Any listing of this award in a publication or other printed material should identify it as a grant from the “Women's Fund of Central Indiana, a CICF Fund.”</p> <p><i>Sample for print, radio, television or World Wide Web:</i> Sponsored by the Women's Fund of Central Indiana, a fund of Central Indiana Community Foundation, inspiring philanthropy.</p>