

# **COSERV CHARITABLE FOUNDATION**

## **Grant Application Guidelines** **(Amended 12/1/08)**

### **Geographic Focus**

The CoServ Charitable Foundation (the “Foundation”) provides funding assistance to approved eligible applicants located within the service areas of CoServ Electric and/or CoServ Gas (collectively, the “CoServ Service Area”), and to approved eligible applicants that are located outside the CoServ Service Area and provide services to individuals residing within the CoServ Service Area.

### **Grant Cycles**

Grant applications are reviewed monthly. Applications are to be received in the Foundation offices by the close of business on the third Tuesday of the month.

### **Categories of Assistance**

1. Community Service
  - Programs, projects and organizations that are important components of a community’s overall quality of life, with emphasis on public safety, health care, self-sufficiency, and basic human needs.
2. Education and Youth
  - Programs and projects designed to combat critical social problems affecting our youth, with an emphasis on children and teens at risk.
  - Programs and projects that promote youth wellness.
3. Environment
  - Programs that promote community recycling and natural resource preservation.
  - Community-based environmental quality education programs.
4. Disaster Relief
  - Programs and projects to provide disaster relief and food, clothing, shelter, medical care, clean-up and repairs and reconstruction in an emergency following an accident, severe storm or other causes.

The CoServ Charitable Foundation will not consider requests for general operating funds, capital campaigns or support for salaries. The CCF prefers requests for programmatic needs.

### **Applicant Eligibility**

1. Contributions will generally be made only to not-for-profit organizations that have been granted tax-exempt status by the Internal Revenue Service; and to civic-based entities.
2. The organization must contribute to the community's health and/or welfare.
3. The organization's services must be non-discriminatory in nature.
4. Activities affiliated with a religious organization with a secular community designation are eligible for the Foundation's consideration of support. *A secular designation is defined as an organization separate from the church or religious organization that provides services to people regardless of their religious beliefs and does not propagate a belief in a specific faith. (Example: A food bank that is a separate 501(c)(3) organization from a church and provides food and meals to anyone who qualifies for services, regardless of religious belief.)*

### **Evaluation Factors**

1. The following factors will be considered in the evaluation of all funding requests:
  - Potential benefit to residents of the CoServ Service Area and the entire community.
  - Prior contribution level of CCF or community support for the program or project or the organization requesting the funds.
  - Fiscal and administrative capability of the organization to deliver a quality service or program.
  - Results that are predictable and can be evaluated.
2. The Foundation's Grants Committee shall evaluate funding requests and present recommendations to the Foundation Board of Directors.

### **Project Timing**

Request for funding should state whether the funds are intended for ongoing operations or for a specific project that will terminate at some point in the future. Whenever possible, requests for funding should be for projects that will be completed within 12 months following the Foundation's approval of the grant application.

### **Project Reporting**

Grant recipients will be required to submit the following forms of project documentation or accountability.

#### Grants for material items (i.e., equipment, supplies, vehicles, computers, food):

Applicant must submit copies of receipts or invoices related to the project and the use of Foundation funds.

Grants for services (i.e., training, event sponsorship, leadership programs):

Applicant must submit a “Project Status or Completion Report” describing the scope of the program, identifying the beneficiaries of the service and documenting how Foundation funds were used.

Grants for projects that assist CoServ members/customers with day-to-day living expenses:

Applicant will submit monthly reports to the Foundation describing the beginning of the month Foundation account balances, identifying the CoServ member/customer receiving the assistance, the vendor receiving the payment and the amount of the payment assistance, and end of the month Foundation account balances.

Any such reports received by the Foundation may be used by the Foundation for publicity and public relations purposes. Privacy information guidelines will be considered when determining public relations initiatives.