

Fund for Williamstown

a fund of

Berkshire Taconic Community Foundation

Grant Guidelines and Application

Creation of the Fund

The Fund for Williamstown was formed in 2006 as a community effort to build an endowment to support innovative programs and services that will enhance the quality of life for residents of Williamstown. The Fund serves as a permanent resource to help make life safer, healthier, fuller or more enjoyable for members of the community. The Fund for Williamstown is an endowment of Berkshire Taconic Community Foundation.

The Fund for Williamstown Community Board presently includes: Jane Allen, Carolyn Behr, Liz Costley, Carol DeMayo, Henry Flynt, Mark Gold, Rob Jandl, Stefanie Jandl and Jack Merselis.

Purpose of the Fund

The Fund for Williamstown serves those wishing to create a more vibrant town that is responsive to a diversity of community needs and voices. The Fund actively seeks out new ideas, approaches and collaborations. It welcomes grant applications from individuals or groups who bring innovative thinking to big issues and small ones. The Fund supports programs and services in all aspects of community life including social services, public education, environmental protection and the arts.

In recognition of the impact of the current economic challenges, the Fund is also accepting applications this year to support initiatives and programs that are critical to sustaining the community in difficult times.

The Fund is not a substitute for public support of the town's operating and capital budget. Rather, it supports projects that go beyond what we need to what we want – fostering services and programs that make Williamstown a truly unique place to live.

Eligibility

Individuals, nonprofit organizations and public agencies are eligible to apply for grants. Requests will be considered for projects, programs and capital improvements that serve the residents of Williamstown.

Neither the Fund for Williamstown nor Berkshire Taconic Community Foundation supports organizations which in their constitution, by-laws or practice discriminate against a person or group on the basis of age, race, national origin, ethnicity, gender, disability, sexual orientation, political affiliation or religious belief.

Berkshire Taconic Community Foundation

271 Main Street, Suite 3, Great Barrington, MA 01230-1972

T: 413-528.8039 F: 413-528-8158 info@berkshiretaconic.org www.berkshiretaconic.org

Awards

Grants usually range between \$100 and \$5,000. The Board reserves the right to vary the number and size of grants awarded depending on their perceived importance to the Williamstown community.

The Fund for Williamstown does not require a match for its grants. However, other community support - either through cash or in-kind donations - is recommended to indicate the degree of enthusiasm for the project.

Grant recipients will be expected to provide the Board with a written evaluation of the project.

Deadline

Applications must be received at Berkshire Taconic by 5 p.m., April 9. If an application deadline falls on a weekend or holiday the deadline is extended to the next business day.

Notification

Applicants will be notified within three months of the deadline date.

Questions

Call Brian Thayer, Berkshire Taconic's stewardship coordinator, at 413.528.8039 or send an email to bthayer@berkshiretaconic.org. You can also contact Liz Costley, chair of the Fund for Williamstown advisory committee at 413.458.5894 or lizcostley@gmail.com.

Review and Approval Process

Applications are reviewed fairly and competitively and selections are based on the stated review criteria by the Fund for Williamstown Community Board. The selected recommendations will be reviewed by Berkshire Taconic's board of directors.

Review Criteria

- **Quality:** How worthy is the project? Is it the right time for this project? Does it involve qualified individuals or organizations? Is it well conceived? Does it fit well with other related activities and priorities? Is it cost effective?
- **Extent of Impact:** What is the potential impact of the project or service on the Williamstown community? Does it engage the community? Does it address an unmet need in the community? Is it a critical program or initiative at this time?
- **Feasibility:** Can the applicant complete the project? Does the organization or individual exhibit a demonstrated capacity to initiate and successfully execute similar projects? Are the appropriate staff members or volunteers involved? Is the staff/group capable and stable enough to perform the tasks necessary to complete the proposed project?

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To Apply

Individuals: Forward a 2 page letter with the following information:

- a description of the issue, need or challenge that you wish to address
- a description of how you propose to address the issue and how it meets the review criteria
- the credentials and contact information of the individuals/organizations that will be involved
- the costs involved and timeline for project
- if this is an ongoing project, your intentions for the project's future, including future funding
- strategies for raising matching funds or in-kind donations
- the expected outcome of your proposed project

Fund for Williamstown board members or Berkshire Taconic staff members may contact you to gather more information on your request.

Organizations: Submit one copy of the attached application form addressing all review criteria. Application forms are also available at www.berkshiretaconic.org or by calling 413.528.8039.

ATTENTION: ARTS AND CULTURAL ORGANIZATIONS

Beginning this year, Berkshire Taconic Community Foundation is engaging in a new partnership with the Massachusetts Cultural Data Project (Massachusetts CDP). The first management tool of its kind, the Massachusetts CDP is a state-wide, collaborative effort of public and private funders throughout Massachusetts and consists of an online system for collecting and standardizing historical financial and organizational data. Berkshire Taconic Community Foundation, along with other funders in Massachusetts, now **requires** cultural organizations applying to this fund to complete a Data Profile **annually** through the Massachusetts CDP website (<http://www.massculturaldata.org>). The information you enter into the Data Profile will be used in your application to the Fund for Williamstown, and in other applications you might make to Berkshire Taconic Community Foundation or other participating funders throughout the state.

The Massachusetts CDP will provide the cultural community with consistent, reliable, comprehensive data on arts and culture in Massachusetts, and enable organizations to view trends in their data, benchmark themselves against peer organizations, and enhance their financial management capacity.

For more information about the Massachusetts Cultural Data Project, please see www.massculturaldata.org.

Berkshire Taconic Community Foundation

Berkshire Taconic Community Foundation is a nonprofit organization that serves as a catalyst for philanthropy. We provide creative leadership by identifying current and future needs in our communities. Since 1987, families, individuals and community groups have been establishing permanent charitable funds, which we administer and invest. Berkshire Taconic is proud to serve as steward for the Fund for Williamstown.

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Fund for Williamstown Grant Application Form for Organizations

For your convenience, you may choose to copy and fill out this cover summary or to create your own one page version using the headings listed below.

Fund to which you are applying: **Fund for Williamstown**

Date: _____

1. Legal name of Organization: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____ Email: _____

2. IRS 501(c)(3) nonprofit: Yes; No

a. If no, identify your fiscal agent and include a copy of a written agreement from fiscal agent to sponsor the project.

Fiscal agent: _____

3. Contact person and title: _____

4. Executive Director (if different from contact): _____

5. Amount requested: \$ _____

6. Organization's mission:

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7. Brief summary of the proposal:

8. Total annual organization budget: \$_____ Fiscal Year End: ____ / __ / __

9. Project budget: \$ _____

10. The period this grant will cover: _____ / ____ / _____ to _____ / _____ / _____

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Proposal Narrative

1. **In no more than 1 page**, give a brief profile of your organization including summary of organization's history, goals, constituents and key achievements.
2. **In no more than 2 pages**
 - a. Profile of your request including a description of how your request addresses the review criteria of: quality of project or service; its impact on the organization/community; and the ability of the organization to carry out the project.
 - b. How your project will further the purpose of the Fund you are applying to as described in the Fund's guidelines
 - c. Community, regional or organizational needs or challenges addressed by the proposed project
 - d. Specific methods and timetable for meeting your stated objectives
 - e. Intentions for this project's future, including sustainable funding, if applicable
 - f. Strategies for raising matching funds or in-kind donations
 - g. If a grant is not awarded from the Fund for Williamstown, what part of the project will be cancelled or severely curtailed?

Attachments

All of the following attachments must accompany the proposal.

1. IRS letter confirming tax-exempt status (501(c)(3)) unless this is already on file at Berkshire Taconic.
2. Current Board list with names and addresses.
3. Most recent independent audit. If the organization does not have audited financial statements, send the most recently filed IRS Form 990.
4. Detailed project budget showing income and expenses, including any other companies and foundations being approached to fund this proposal, with dollar amounts indicating which sources are committed, pending, or anticipated.
For arts and cultural organizations only: Massachusetts CDP Funder Report for Berkshire Taconic Community Foundation—Fund for Williamstown
5. Current organizational operating budget.
6. Certificate of Non-Discrimination.

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CERTIFICATE OF NON-DISCRIMINATION

The governing board of: _____

maintains the following policy of non-discrimination:

1. No person is excluded from agency programs or benefits because of race, color, religion, gender, national origin, ancestry, age, medical condition, disability, veteran status, marital status, sexual orientation or any other characteristic protected by law.
2. There is no discrimination on the basis of race, color, religion, gender, national origin, ancestry, age, medical condition, disability, veteran status, marital status, sexual orientation or any other characteristic protected by law with regard to hiring, assignment, promotion or other conditions of staff employment.
3. There is no discrimination on the basis of race, color, religion, gender, national origin, ancestry, age, medical condition, disability, veteran status, marital status, sexual orientation or any other characteristic protected by law on the agency's governing body.

I certify that the practices of this organization conform to the policy of non-discrimination stated above.

Date

Typed or printed name of President or Board Chairperson

Signature of President or Authorized Official

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