

The Morton-Kelly Charitable Trust
Grant Information, FAQ's and Guidelines
Revised, June 2018

The Morton-Kelly Charitable Trust was established in 1988 by Joan Morton Kelly and her mother, Mildred Duncan Morton, to facilitate their philanthropic activities.

Joan was a 1942 graduate of Wellesley College and received her Ph.D. in Zoology from the University of Michigan. She was instrumental in the creation of the Children's Zoo at the San Diego Zoo and became its superintendent in 1958.

Joan and her family were long time summer residents of Higgins Beach in Scarborough where they were at one time the owners of the Silver Sands Hotel, which was destroyed in a winter storm. After the death of her father and her husband, Joan and her mother maintained their residence at Higgins Beach and lived part time in Cape Elizabeth. An early admirer of Rachel Carson, Joan became a dedicated environmentalist and worked to protect Higgins Beach and surrounding areas.

After becoming a full-time Maine resident, Joan became deeply involved in the Greater Portland community and active on the boards of many nonprofits including the Portland Museum of Art, the Children's Museum, the Maine College of Art and the Maine Maritime Academy among others. As the years passed, her philanthropy and that of the Trust, extended throughout Maine. Always a person of great generosity, she diligently sought to maintain her privacy and anonymity. Since Joan's death in 2012, the Directors of the Trust have been committed to serving as thoughtful stewards of this philanthropic legacy.

What types of organizations are eligible for grants?

All grant applicants must be eligible to accept tax-deductible donations as outlined in Section 170(c) of the Internal Revenue Code. This includes 501(c)(3) federal tax-exempt organizations, public schools, public agencies or Indian tribal governments (and their political subdivisions) recognized by the Department of the Interior. The Trust does not make grants to individuals.

What type of projects does the Morton-Kelly Charitable Trust consider?

To assist applicants, the directors of the Morton-Kelly Charitable Trust have identified the following areas of interest with a focus on serving individuals and communities in the State of Maine:

Educational programs, that provide participants with access to resources both inside and outside of the traditional classroom. The Trustees are especially interested in supporting under-served populations and have emphasized youth and immigrant leadership programs, as well as programs aimed at increasing economic independence.

Cultural projects, with priority given to those with a community education or engagement component. The Trust welcomes projects that strengthen or improve

programming in Maine public libraries, museums and cultural organizations. Projects that expand organizational capacity are encouraged.

Historic preservation projects, for restoration or conservation of significant historic structures (National Register listed, community landmark, or similar). For those projects, priority for funding will go to structural improvements and building systems (such as electrical service), rather than maintenance, painting or short-term repairs. Applicants in this category should provide a letter indicating that the Maine Historic Preservation Commission is aware of the project and that the work being conducted aligns with appropriate preservation standards.

Applicants should demonstrate clear project planning as well as fiscal or fundraising capacity to complete the proposed work beyond the amount funded by a Morton-Kelly grant.

Environmental initiatives, with priority given to programs that engage and educate young people in natural sciences as well as the preservation and protection of natural resources. For projects involving land purchase or improvement, the Morton-Kelly Trust will prioritize support for acquisitions that have specific ecological, habitat, aesthetic or community value. Applicants should demonstrate the fiscal and fundraising capacity to complete the proposed work beyond the amount funded by a Morton-Kelly grant.

What is the typical grant size?

Generally, grants range in size from \$5,000 to \$20,000 depending upon the size of the organization or project. An average grant is about \$9,000. The Directors may use their discretion from time to time to make awards outside of that range.

Are there any special considerations?

- Organizations are encouraged to partner and collaborate with others where there is an overlapping mission or geography.
- Applicants that demonstrate how they are supporting or serving a need in their Maine community are more likely to be funded.
- Priority may be given to those applicants that serve rural areas where access to funding is less available.
- Historic preservation applicants are asked to include a letter of support from the Maine Historic Preservation Commission.

Are there any restrictions?

- Generally, the Trust does not provide multi-year grants, but applicants may be considered for up to two consecutive years. Applicants who have had consecutive grants are welcome to reapply after waiting for at least one grant cycle.
- The Trust generally does not fund endowments or annual campaigns.
- The following organizations are **not** encouraged to submit requests:
 - National or regional organizations based outside of Maine, except in cases where a project is being conducted entirely within the state;

- Organizations that provide medical services, operate medical research facilities or focus on a particular disease or condition;
- Organizations that are primarily social service providers;
- Organizations that mostly serve non-resident audiences or focus on providing professional development.

Application Instructions

The Trust considers grant requests once per year. Requests must be received or postmarked by October 1st each year. Grant requests will be accepted after July 1. All requests will be acknowledged upon receipt. Please note that the Trust's grants are competitive – we generally receive many more proposals than our resources allow us to fund.

There is no grant application form. Please limit your materials to the following:

- A brief background of your organization.
- The specific grant amount requested.
- The purpose of the request, how funds will be used and the anticipated results. The board is especially interested in projects that will move an organization forward in terms of its mission or its capacity. For example, a theater organization might seek support for a new ticketing system in order to reduce administrative effort and allow more resources to be devoted to programming.
- A list of your organization's staff and directors or trustees.
- Your organization's operating budget for current year.
- A project budget (if applicable to your request).
- A copy of your most recent financial report. Please know that the board looks carefully at financial statements. If your organization has any financial results that might raise questions (such as a large surplus or an operating deficit), be sure to include an explanation.
- A copy of your most recent IRS determination letter indicating your 501(c)(3) status

Please mail THREE copies of your completed request to the following address:

Michael J. Quinlan, Secretary
 Morton-Kelly Charitable Trust
 P.O. Box 4510
 Portland, Maine 04112

If you choose a mailing option that requires a physical address, please use the following:

Michael J. Quinlan
 Jensen Baird Gardner & Henry
 Ten Free Street
 Portland, Maine 04101

The Trust is unable to accept e-mailed grant requests. Typically, the directors review all requests in November and decision letters are sent before the end of December of each year.

Is there someone to contact if I have questions?

Please feel free to contact Erik C. Jorgensen, Administrative Trustee, Morton-Kelly Charitable Trust, erik.c.jorgensen@gmail.com.