

Morton-Kelly Charitable Trust
Guidelines and Application Instructions
Revised: June 2019

The Morton-Kelly Charitable Trust was established in 1988 by Joan Morton Kelly and her mother, Mildred Duncan Morton, to facilitate their philanthropic activities. This information, and more details about the Trust's grantmaking are available at www.morton-kelly.org. Applicants are urged to visit the site before applying.

General information and FAQ's about the Trust's Grants

The Trust will consider grants for public programming, capital expenses, and in some circumstances, operating support. 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 resources**, projects in organizations that serve as or provide statewide or community cultural resources. The Trust welcomes projects that strengthen or improve programming in Maine public libraries, museums, arts and cultural organizations. Projects that expand organizational capacity are encouraged
- **Historic preservation projects**, for restoration and 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 work is being conducted to appropriate preservation standards.

Applicants should demonstrate clear project planning as well as fiscal and fundraising capacity necessary 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 direct support for 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 a typical grant size?

Generally, grants range in size from \$5,000 to \$20,000 depending upon the size of the organization or project. The average grant award is around \$9,000.

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 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 encouraged 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 two 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 Trust does not fund projects focused on political advocacy.
- 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.

When is the deadline?

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.

How will I learn about the directors' decisions?

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.

HOW TO APPLY:

What should I include in my grant request?

There is no grant application form, though we ask that you include in each copy of your proposal our application cover sheet (attached). 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

What is the process for submitting my request?

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.

What is expected from my organization if we receive a grant?

In the grant award letter, we will ask you to submit a brief written report (either a final report or an assessment of work on your project to date) on the use of the funds received from the Trust and the impact or outcomes **no later than September 1** of the year following the date of the grant award.

Please note that we normally will not consider additional grants for an organization that owes the Trust a grant report.

The Morton-Kelly Charitable Trust Grant Proposal Cover Sheet

Please complete the following and submit with your application:

Organization Name:

Contact Person and Title:

Mailing Address:

Website Address:

Contact Telephone Number:

Contact E-mail:

Grant Amount Requested:

Project Description (Brief Summary in 1 or 2 sentences):

IRS Tax ID number:

Geographic Area (Towns or County) Served by the Project:

Your complete proposal should include, in addition to this cover sheet, the following information:

- 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.
- 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**.