

**Morton-Kelly Charitable Trust**  
Guidelines and Application Instructions  
Revised: July 2022

**For the 2022 grant cycle, Morton-Kelly Charitable Trust will consider grant requests from prior grantees only, with the exception of considering new requests from indigenous-led organizations operating within the Foundation's established Areas of Interest who have not previously received funding.**

**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](http://www.morton-kelly.org).

### **Foundation Areas of Interest**

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:

- **Education.** The Trust supports educational programs that provide participants with access to resources outside of the traditional classroom. The Trust is especially interested in supporting organizations that serve historically disadvantaged populations and those that provide training and mentoring that can lead to increased economic independence.
- **Arts and Culture.** Arts and Culture programs that provide statewide or local community benefit are of interest. The Trust welcomes projects that strengthen or improve programming in Maine public libraries, museums, visual and performing arts and other cultural organizations. Projects that expand organizational capacity are encouraged as well as those that seek to serve diverse populations and cultural experiences.
- **Historic Preservation.** Supported Historic Preservation projects include the restoration and conservation of significant historic structures such as those listed on the National Register, or of documented importance through Tribal Historic Preservation Departments or a known community landmark. 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. Preservation projects may also include restoration or significant material cultural resources. Applicants in this category are strongly encouraged to provide a letter indicating that the Maine Historic Preservation Commission or appropriate Tribal Historic Preservation Office is aware of the project, and that work is being conducted to appropriate preservation standards.
- **Environment.** The Trust supports 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 Trust will prioritize support for acquisitions that have specific ecological, habitat, aesthetic or community value as well as requests from indigenous-led conservation efforts.

## Types of Grants

Morton-Kelly Charitable Trust supports organizations throughout Maine and aims to respond to emerging needs and developments in its priority areas of interest. Requests may fall into more than one of our areas of interest and be for operating or project support. The Foundation believes that operating support allows organizations to adapt to changing conditions in the nonprofit sector and within the fields we support. Project grants should articulate clear goals, timelines and outcomes for the project. Projects may be for specific programs or capital expenses. You will be asked to designate what type of funding you are requesting in the online application form.

## Frequently Asked Questions

### 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 \$10,000.

### 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 or relevant Tribal Historic Preservation Department.
- Indigenous-led organizations that fall within our grantmaking priorities may apply in 2022, even if they did not receive funding from MKCT in prior years.
- For capital funding requests, such as historic preservation or land purchases, 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. We will request recent financial audits or budgets for capital projects.

### Are there any restrictions?

- Generally, the Trust does not provide multi-year grants,
- 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; or
  - Organizations that are primarily social service providers.

## **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.

## **HOW TO APPLY:**

### Eligibility

For the 2022 grant cycle, we are only accepting requests from former grantees AND indigenous-led programs that have not been previously funded. These organizations may apply in 2022 as long as those requests fall within our current grantmaking priorities.

### Application Submission/Grant Application Portal

The Morton-Kelly Charitable Trust accepts grant applications only from July 1 to October 1 each year using an [online grant application portal](#). The application period closes at 11:59:59 PM on October 1 and we are not able to grant extensions.

If it is your first time applying through our on-line system, you will need to create an account for your organization before completing an application. If you have applied previously, you can access the grant application portal using the same username and password. An application form will only be visible on the site during the application period. Finally, you will be able to save and return to your work at any time before you submit.

All submitted applications will be acknowledged via e-mail receipt.

The application and registration are available [here](#).

If you received a grant from MKCT in 2021, please complete a grant report for that grant before submitting your current request. A reminder will be sent in August to submit your grant report also using the grant application portal.

### Project vs Operating support

This year, **applicants may request project or operating support.**

Through the operating support grants we provided over the last two years, we learned how organizations are adapting and adjusting to changing circumstances and trends influenced by the pandemic. We know that earned revenue and ticket sales are down for arts and cultural organizations that rely on in-person visitation, classes and events. We also know that capital costs for historic preservation projects have significantly increased and timelines have been extended accordingly. Education programs have had to juggle in-person and remote programming and build technical capacity to serve participants. Environmental and conservation initiatives are impacted by increased real estate and transaction costs and indigenous-led programs in land conservation and cultural preservation are expanding. We encourage organizations to request operating support while sharing their strategic direction and general program activities. The same application is used for both types of grants.

#### Application deadline

The Trust considers grant requests once per year. The [online grant application portal](#) can accept grant applications only from July 1 to October 1. All requests will be acknowledged upon receipt. The application period closes at 11:59:59 PM on October 1 and we are not able to grant extensions.

#### Review process

Please note that the Trust's grants are competitive – we generally receive many more proposals than our resources allow us to fund. Typically, the Board reviews all requests in November and decision letters are sent before the end of December of each year.

#### Past grants

See a list of past grants [here](#).

#### Questions?

Feel free to contact Lissa Widoff, Program Advisor at [programs@morton-kelly.org](mailto:programs@morton-kelly.org) if you have any questions .