

## **Marcy Shulman Memorial Organization Grant Program**

is offered annually to provide assistance and support to community, local and national non-profit organizations that offer programs and services to individuals and families with chronic illnesses in the United States, with priority on those within the bleeding disorders community.

### **Application Guidelines for the 2023-2024 Grant Cycle**

**The COVID-19 pandemic made us realize that it is important to have back-up plan in place in the event an in-person project needs to go virtual. Therefore, we have decided to once again require all in-person projects to have a virtual back-up plan indicated in the application. If you fail to do this, your application will be disqualified.**



# *CK Colburn Keenan Foundation, Inc.*

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## **History**

The Marcy Shulman Memorial Organization Grant Program is named in honor of one of the founding members of the Colburn-Keenan Foundation's Board of Directors, Marcy Shulman. Marcy was a long-time friend, co-worker, and collaborator of the Foundation's founders, Donald Colburn and Kathy Ann Keenan. Marcy helped bring to fruition Don's and Kathy's final project, the Colburn-Keenan Foundation, following their passing from cancer in 2006. Marcy worked tirelessly developing the support programs and fine-tuning the mission of the Foundation, even as she battled cancer which would finally claim her in December of 2010. Her personal friendships and long time work with Don and Kathy instilled the Foundation with the essence of their combined visions of supporting people and community organizations serving those living with chronic health conditions. Her remarkable grace, determination, and perseverance coupled with her commitment to the Foundation's goals serve as an inspiration for all working with the Foundation and for the communities served by the Foundation. The Colburn-Keenan Foundation, along with Marcy's family and friends, are proud to now offer the Organization Grants in her memory.

Marcy was a social and political activist who brought her organizational and networking skills to her work and friendships. She was a tireless champion of women's rights and the rights of underserved communities. She worked at the National Hemophilia Foundation developing the NHF's AIDS Education and Preventive Services and became their Senior Director of Education. Her many accomplishments at the NHF included developing and directing leadership training workshops; training over 300 grassroots peer educators; designing and implementing multi-year, multi-million dollar federal grant programs from the CDC; developing and directing education publications, website, videos, and workshops; and working with grass-roots organizations and centers to build and strengthen legislation and relationships throughout the bleeding disorders and immune compromised communities. She was a frequent educational presenter and she was published multiple times on issues affecting the communities she served. Her collaboration with Donald Colburn brought her to work with him and Kathy Ann Keenan at AHF, where she continued her work helping the bleeding disorders community.



### Grant Timeline

Application Guidelines posted to website	March 6, 2023
Application Deadline	March 31, 2023 at 11:59 p.m. EST (deadline extensions will not be granted)
Award Announcements	By May 31, 2023
1 <sup>st</sup> set of checks sent	On or around July 1, 2023 (once signed Expenditure Statement is received)
2 <sup>nd</sup> set of checks sent	On or around December 1, 2023
Final Report	3 months after date of event

### Eligibility Requirements

- Organizations that offer programs to individuals and families with chronic illnesses in the United States, with priority on those within the bleeding disorders community
- Organizations must have their 501(c)3 status
- Organizations are eligible to apply for and potentially receive one Marcy Shulman Memorial Organization Grant each grant cycle. If you are a past recipient and are delinquent in submitting your required reports, you must do so prior to submitting your new application or it will not be considered for review.

### Grant Proposals

Proposals **must** improve the quality of life and health of members of the bleeding disorders and chronic illnesses communities.

Examples of Proposals Approved:

- Dental Education Program
- Youth Safe Sport & Wellness Program
- Purchase of mattresses for a camp facility
- Deck replacement and safety upgrades
- Teen/Young Adult Retreat

Organizations **should not** submit proposals for projects similar to the various programs offered by the Colburn-Keenan Foundation, including but not limited to:

- financial assistance programs to individuals and families facing financial hardship
- grant programs for other organizations
- undergraduate scholarship programs for students with bleeding disorders
- campership programs to help children attend summer camps
- educational travel grant programs to help individuals attend educational conferences



**Grant Details**

- The number of Grant awards vary and the grant amounts range from \$1,000 - \$7,500 annually. CKF reserves the right to change the number of awards and the amounts based on the applicant pool and available funding.
- Grants are for the 2023-2024 grant cycle which is July 1, 2023 to June 30, 2024. Expenses incurred prior to July 1, 2023 will not be covered by this grant and all grant money must be used on or before June 30, 2024.
- All grant funds as well as any interest earned thereon must be expended for charitable, scientific, literary, or educational purposes in accordance with the activities outlined in your grant proposal.
- The grant funds may not be used for any of the following purposes: to attempt to influence legislation or the outcome of any specific public election; to carry on, directly or indirectly, any voter registration drive; to make grants to individuals or to other organizations, which do not comply with the requirements of Section 4945(d)(3) (or (4)), or undertake any activities for a non-charitable purpose.
- Any funds not expended or committed for the purposes of the grant within the period indicated in the grant approval letter must be returned to the Foundation.



## **Required Documents**

Applicants must include the following attachments with their application:

1. **Application** – Microsoft Word document can be downloaded from our website. Failure to use this application, will disqualify you. If you are applying for a project that has already received a CKF grant, please **DO NOT** just cut and paste from last year’s application. We want to see that improvements are being made.
2. **IRS Determination Letter 501(c)3**
3. **Current year to date** Financial Reports (Balance Sheet **and** P&L Statement).
4. **Most recent IRS 990**. If an extension has been filed, please include a copy of the extension approval.
5. **Project Budget** – Microsoft Excel document can be downloaded from our website. You **MUST** use the format shown in this document or you will be disqualified. The more detailed the better.
6. **Statement of Verification** – Microsoft Word document can be downloaded from our website.
7. **Consent to Allow Release of Protected and/or Proprietary Information** – Microsoft Word document can be downloaded from our website. You **MUST** list both references on this document.
8. **Two (2) References (Failure to follow the rules below will disqualify your application – please see Additional Notes on following page):**
  - a. If the project you are applying for HAS NEVER been awarded a grant from CKF, then both reference letters should come from stakeholders and/or funders of the organization.
  - b. If the project you are applying for HAS been awarded a grant from CKF, then we need the following:
    - i. 1 reference letter from an attendee of the prior year’s project (i.e. you received a grant during the 2022/2023 grant cycle for your Men’s Retreat and are now applying for another grant for your Men’s Retreat, then you must provide a reference letter from an attendee at the Men’s Retreat held last year)
    - ii. 1 reference letter from a stakeholder or funder of the organization



## **Additional Notes Regarding Reference Letters:**

- References may not be from a volunteer or staff member of your organization or their immediate family members
  - References must provide actual letters addressed to us and not just their biographies/names in an email.
  - Definition of Stakeholder – is a person that has an interest/concern in the project you are requesting funds for or has been a attendee or recipient of a project you have run in the past
  - Definition of Funder – a person or organization that has committed funds to your organization for the project you are requesting funds for or for a project you have run in the past
9. Additional materials related to your proposed project in the form of agendas, pictures, videos, survey results, etc.
- a. If the project you are applying for HAS NEVER been awarded a grant from CKF, then this item is optional for you.
  - b. If the project you are applying for HAS been awarded a grant from CKF, then it is mandatory that you supply the following items, if you have them:
    - i. Project agenda
    - ii. Project brochure/advertisement
    - iii. Pictures/videos of project in action
    - iv. Survey results, if a survey was given at the end of the project.



## **Submission Requirements**

1. Application and all attachments must be submitted via email to [marcyschulmangrant@colkeen.org](mailto:marcyschulmangrant@colkeen.org). Do not submit until you have completed your application and all required documents. Please submit application and attachments in the least amount of emails as possible and on the same day.
2. Application and attachment file names must begin with **your** organization's name, followed by the content of the file. Acronyms and abbreviated names are acceptable. For example:
  - a. CKF-Application
  - b. CKF-501c3
  - c. CKF-Financials
  - d. CKF-990
  - e. CKF-Budget
  - f. CKF-Verification
  - g. CKF-Consent
  - h. CKF-Reference 1
  - i. CKF-Reference 2
  - j. CKF-Addtl Part 1
  - k. CKF-Addtl Part 2
  - l. CKF-Addtl Part 3
3. Applications must be submitted by March 31, 2023 at 11:59 p.m. EST. **Late applications will not be considered.**
4. If you do not follow the Submission Requirements exactly, your application may not be considered.

## **Acceptance of an Application**

Allow five to seven business days, after emailing your application and attachments to receive a response from the Colburn-Keenan Foundation that the documents were received. This response will only confirm that your email was received and not the accuracy of the application. It is the applicant's responsibility to be sure all required attachments are submitted on time. The Colburn-Keenan Foundation will not track down missing attachments or review incomplete applications.





### **Selection Criteria**

An impartial review committee, comprised of at least one member of the Colburn-Keenan Foundation's Board of Directors and several community volunteers, will review grant applications. The review committee will evaluate grant applications and recommend recipients considering the project's potential impact on the quality of life and health of members of the bleeding disorders and chronic illnesses communities. The committee will submit its recommendations to the Colburn-Keenan Foundation's Board of Directors who then will ultimately vote to approve the final list of grant recipients.

### **Award Notifications**

Decisions will be made and notifications sent to grant recipients and applicants not selected to receive a grant via email by May 31, 2023.

### **Responsibilities of an Organization Awarded a Grant**

You must respond to the Award Notification email sent to you. You must countersign and return a copy of the Expenditure Statement mailed to you. You must agree to provide a final narrative and financial report on the use of grant funds to the Foundation's representative within three months of completion of the project. Each report should include a narrative account of what was accomplished by the expenditure of funds (including a description of progress made towards achieving the goals of the grant), a financial statement, and copies of any publications resulting from the grant, if any. The financial statement should be attested by the responsible financial officer of your organization or a certified public accountant, and should reflect the categories stipulated in your grant proposal. Reporting cycles (as outlined above) will include regular programmatic and budgetary reporting deadlines. Organizations failing to meet established reporting and benchmark deadlines may be denied remaining funds and/or may not be eligible to apply for future funds. Although the grant funds need not be physically segregated, such funds should be shown separately on your books for ease of reference and verification. Records of receipts and expenditures under the grant, as well as copies of reports submitted to the Foundation, should be kept for at least four years following completion of such receipts and expenditures. Your books and records are to be made available for the Foundation's inspection at reasonable times, if requested. The foregoing conditions comply with obligation under United States law to make reasonable efforts and establish adequate procedures to see that grant funds are spent solely for the purposes for which they were granted, and to obtain full and complete records on how grant funds have been expended. Changes in United States laws, or in regulations interpreting them, may require the Foundation to ask that more detailed reports be submitted or that other steps be taken. The Foundation would promptly inform you of any such changes.



**How and When are Checks Issued**

The first ½ of your grant award amount will be issued once a signed expenditure statement is received, but not before July 1, 2023. The balance of your grant award amount will be mailed on or around December 1, 2023.

If you are a past recipient of a Marcy Shulman Memorial Organization Grant and are delinquent in submitting the required narrative and financial reports on the use of grant funds, you must submit this report immediately or payments will not be mailed out as noted above.



## Frequently Asked Questions

**1. Can an application be submitted for less than \$7,500?**

Yes

**2. Can an organization apply for multiple projects within an application?**

No, you can only apply for 1 project per application per year even if the requested grant amount combined would be \$7,500 or less.

For example, a project entitled “Retreats” which would consist of 3 separate retreats (men’s retreat, women’s retreat and teen’s retreat”) is considered 3 separate projects so you would need to apply for only 1 of the retreats.

**3. Can multiple organizations apply under one application if they are hosting a single project together? (This question has a YES and NO answer)**

a. **Yes**, multiple organizations can apply under one application if they are hosting a single project together and are requesting up to a maximum of \$7,500. The following must be done:

- i. The “Organization Information” and “Past Recipient Information” must be repeated for each organization applying.
- ii. The “Qualities for Success” and “Points of Interest” must be presented in a bulleted format and include responses from each organization applying.
- iii. Each organization must provide the required documentation such as 501(c)3, current financial reports, most recent IRS 990, Statement of Verification, Consent to Allow Release and two references.

b. **No**, multiple organizations who are hosting a single project together and **each** want to request up to \$7,500 total, must submit separate applications and indicate in the application what organization(s) they are working with and give a clear budget of the project and note within the budget what organization is responsible for what expense.

**4. Can an organization apply for a separate grant that pertains just to their organization, if they are also part of a group effort (see #3 above)?**

No, our eligibility guidelines state “Organizations are eligible to apply for and potentially receive one Marcy Shulman Memorial Organization Grant each grant cycle.” We have limited funds and receive great applications every year so are unable to give money to the same organization multiple times in one grant cycle.



5. **Can a new organization, who has not yet been required to file a 990, apply and does anything additional need to be provided?**

Yes, a newly created organization can apply even if they have not yet filed a 990. In place of submitting a 990, please supply a signed letter from the organization's treasurer stating when the first 990 is due to be filed.

6. **Can a new organization, who has not yet received their 501(c)3 approved status, apply and does anything additional need to be provided?**

Yes, a newly created organization can apply even if they have not yet received their 501(c)3 status. In place of submitting their IRS Determination Letter 501(c)3, please supply a copy of your application Form 1023, a letter from your Board that you have applied along with a copy of your Board Minutes discussing the 501(c)3 application. If you are selected as a grant recipient, no payments will be mailed until you provide an approved IRS Determination Letter 501(c)3.

7. **What causes automatic disqualification of an application?**

- Not meeting ALL Eligibility Requirements (see page 4 of this document)
- Not submitting the correct Application (see page 5 of this document)
- Not submitting ALL Required Documents (see page 5 of this document)
- Not submitting the correct Budget format (see page 5 of this document)
- Not submitting the correct References (see page 5 of this document)

