



The Robert P. & Clara I. Milton Fund: *for Senior Housing*

GRANT GUIDELINES

Application Deadlines: May 1 & November 1
E-mail submission required to grants@cfsjc.org.

Purpose:

The purpose of this fund is to support innovative programs focusing on issues related to senior housing. Given the fund's significant resources, projects will be considered that look to make a meaningful impact while promoting dignity, independence and quality of life. Taking into consideration the evolving needs of an aging population, this fund strives to make St. Joseph County a regional model for senior housing by acting as a catalyst through the funding of innovative approaches. Senior housing may range from institutional care to in-home care, as well as the various ancillary services related to this issue. Special consideration will be given to projects that serve the most vulnerable of the aging population.

The Milton Legacy:

Robert P. and Clara I. Milton lived for many years on the West side of South Bend. Robert managed one of the city's leading drug stores at the turn of the 20th century. The Miltons did not have children. Upon their deaths (Robert in 1931; Clara in 1942), they bequeathed their estate for the purpose of creating a retirement home for seniors. The Milton Home, located on East Marion Street in South Bend, IN officially opened its doors on September 14, 1951. For many years, it faithfully served the aging community. However, due to increases in life expectancy, health care costs, inflation and operating expenses, the Milton Home was sold on February 26, 1982. Those residents of The Milton Home with "life care" or "perpetual care" contracts at the time of the sale continued to receive life care support paid by the Milton Trust. The last such resident died in November of 2000. In January of 2001, a charitable field of interest fund was established at the Community Foundation of St. Joseph County. A similar fund, originating from the same Milton Trust and bearing the same name, exists at Wells Fargo.

Who Can Apply:

- 501(c)(3) organizations operating in St. Joseph County.
- Not-for-profit educational institutions and other public agencies (agencies of the state, county or local government) in St. Joseph County.

Activities Generally not Funded:

- Annual Appeals or Membership Contributions
- Individuals Directly
- Special Event Underwriting

Priorities for Funding: *(listed alphabetically)*

- Education/Training
- Home & Community Based Services
- Programs/Projects Serving Vulnerable Seniors
- Public Policy Issues

Grants will be Judged by: *(listed alphabetically)*

- Community Impact
- Concept/Idea
- Improved Solutions to Current & Projected Needs
- Organization's Ability to Effectively Implement Project
- Quality of Need
- Sustainability where Applicable

How to Apply:

The deadlines for the Robert P. & Clara I. Milton Fund application are **May 1 or November 1**. Application materials must be submitted via e-mail to grants@cfsjc.org in word processing format (narrative or budget) or Microsoft Excel (budget). Hard copy applications will no longer be accepted.

Agencies with a project consistent with the guidelines and priorities described herein must submit the **The Robert P. & Clara I. Milton Fund Grant Application Cover Sheet** which briefly addresses the following points:

- Brief Project Description
- Goals/objectives at a six month and one year timeframe
- Evaluation of the outcomes of the project
- Sustainability of project after grant funding is expended

The Robert P. & Clara I. Milton Fund Grant Application Cover Sheet is downloadable in Word format at <http://www.cfsjc.org/grantopp/>. The document is a Microsoft Word Form in which the fields expand to accommodate multiple lines of text. Please contact Foundation Program Officer if you experience problems with the document or you need it in another format.

The following are required attachments to the cover sheet:

- Up to 2-page proposal narrative (Word processing format, no PDF documents.)
- Detailed Project Budget (Include sources of revenue & expenses.)

- Current Board Roster with officers identified
- IRS Determination Letter (Only required if not yet on file. Hard copy can be mailed to Foundation if scanned document not available for e-mail.)

NOTE: It is the responsibility of the grant-seeking organization to submit a complete request. Incomplete requests run the risk of being declined without consideration.

The letters of request will be reviewed by the Grants Committee and outstanding requests will be identified for further consideration. Site visits will be conducted at the Grants Committee's

discretion. Agencies may be asked to submit additional information. An invitation to submit a proposal does not guarantee funding.

Notification and Announcement:

The Grants Committee's recommendations are submitted to the CF's board of directors at the June and December board meetings. Applicants are informed immediately thereafter regarding the status of their request. Announcement of the grant award will be made by the Foundation.

Grant Evaluation:

Grants will be evaluated to verify successful completion of the project as defined in the grant proposal and compliance with any conditions made at the time of the grant. Excellent evaluations will enhance the credibility of the recipient organization and their subsequent grant requests. The reverse is also true. Failure to carry out successfully the objectives detailed in the grant proposal may compromise the chances for additional funding.

For more information on the Community Foundation of St. Joseph County, visit www.cfsjc.org.

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