Guidelines for Grantseekers

The Kelsey Trust is a family foundation established in 1988 by Sally Patrick Johnson to benefit the people and protect the environment of the Lake Champlain Basin. The Trust honors the lives and work of Robert Fleming Patrick and Jonathan Kelsey Woods. Since 1989 the Trust has worked collaboratively with the Vermont Community Foundation, which assists the Trust with its grantmaking.

What We Fund

The Trust’s giving is limited to organizations and projects that serve the people and protect the natural environment of the Lake Champlain Basin. Click here for a map of the Basin. The Trust focuses exclusively on the following issues:

- **Environment** - Programs aimed at protecting the environment generally, with a preference for programs focused on Lake Champlain and its tributaries, the Green Mountains, and the Adirondacks

- **Children-at-Risk** - Programs that benefit infants and children with serious educational, emotional, nutritional, and social needs, and their families

- **Education** - Programs that increase educational access, incentives, and opportunities for underserved populations, and for non-traditional students

- **Health & Nutrition** - Programs aimed at promoting health and well-being in underserved segments of the population. Programs that provide nutrition to needy families

What the Trust Does Not Support

The Trust does not make grants to endowment campaigns, to individuals, for sectarian religious purposes, or where the Trust may become a predominant source of support.

Who Is Eligible

The Trust supports organizations that serve the people and/or protect the environment of the Lake Champlain Basin, with a strong preference for organizations located in the Basin. Organizations must be tax-exempt under Section 501(c)(3) of the Internal Revenue Code or be a public agency or municipality in either the state of Vermont or New York. Nonprofit organizations or community groups that are not 501(c)(3)s may be eligible if represented by a non-profit fiscal agent. Applicants must not discriminate on the basis of race, creed, national origin, color, age, physical handicap, or sexual orientation.

Grant Size

In its current fiscal year the Trust’s grants budget will be roughly $200,000, some of which may have been committed in previous years. Because of the Trust’s limited size and the high demand for resources in the Champlain Basin, Kelsey Trust grants typically range in size from $5,000-10,000.
Funding Criteria

In considering potential grants the trustees consider the following:

- Alignment with Kelsey Trust priorities
- Demonstrated need
- The likelihood of achieving the proposal’s stated goals, and the grant’s expected impact
- The sustainability of the project or program
- Applicant organization’s track record and financial sustainability

Application Process

While much of the Trust’s semi-annual grants budget is previously committed, we also fund a limited number of unsolicited proposals through the Letter of Interest (LOI) application process outlined below.

Each application must include the following, merged into a single document – either a PDF or Word file:

**A Letter of Interest (LOI)**

The Kelsey Trust is sensitive to the time and effort that its nonprofit partners invest in seeking support for their important missions. In order to spare grantseekers unnecessary work, LOIs should be limited to no more than one-to-two (1-2) pages. Letters of Interest should provide the following information:

1. A summary of the proposal and its strategic fit with the Kelsey Trust’s mission and program priorities
2. A statement of the proposal’s target population and geographic communities served
3. A statement of the project’s expected outcomes and how you – and the Trust – will know if your program is successful
4. The amount requested from the Kelsey Trust and the percentage of the proposed project/program’s budget such an amount would represent
5. The period over which the requested grant would be expended
6. A list of other support, both public and private, received for the proposed project/program

**An Organization Statement (one page only) on your organization’s letterhead that sets forth:**

1. Legal name of your organization, address, and the name of your executive director
2. Indication of whether your organization is an IRS 501(c)(3) nonprofit and if not, your organization’s fiscal agent
3. Contact person and title, with phone and e-mail address
4. A statement of your organization’s mission
5. Your organization’s annual budget amount
6. Support received from the Kelsey Trust in the last five years

**Proposal**

In some instances, the Trust may choose to treat the LOI application as a final proposal and request no further information. In other cases, the Trust may request a more complete proposal in which case the applicant will be advised what additional information is required.
Deadlines and Notifications

**Spring Grants** – Typically focused on education and the environment. Letter of Interest deadline is June 1. Additional information will be requested if needed. Grant decisions will be made no later than July 30, with notification following soon thereafter.

**Winter Grants** – Typically focused on children and families, basic human needs (food, fuel, shelter), and health. Letter of Interest deadline is December 1. Additional information will be requested if needed. Grant decisions will be made in late December or early January, with notifications following in mid-January.

**Emergency Grants** - The Kelsey Trust will sometimes consider emergency grants outside the normal grant making cycle. Please contact Kim Haigis to outline the request before submitting an out of cycle request.

Contact Information

All Letters of Interest, proposals, and correspondence to the Trust should be directed by email only to:

**Kim Haigis**
Vermont Community Foundation
khaigis@vermontcf.org