



Planning Grant Guidelines

I. General Guidelines

The City of Muskogee Foundation (CoMF / Foundation) was established as a nonprofit corporation in 2008 from the net proceeds of a long-term lease of Muskogee Regional Medical Center. With a mission to “Make a Real Difference”, the Foundation focuses on four primary areas of impact - economic development, quality of life, education and empowerment, and health and wellness. Through these focus areas CoMF works to achieve its mission by developing, supporting, promoting, and improving programs and facilities for the citizens of the City of Muskogee. CoMF Accepts grants for capital construction projects under the Planning Grant Application.

To be eligible for a Planning Grant from CoMF, applicants are required to have completed appropriate organizational, financial and facilities planning. Recognizing that specific and specialized planning may be beyond the financial capacity of some organizations, CoMF accepts applications for **Planning Grants** to community-based, nonprofit, governmental and educational organizations in Muskogee, OK. Applications for a Planning grant will not be accepted by CoMF until the Board of Directors has approved all plans and supporting documentation.

To be considered for a CoMF Planning Grant qualified organizations must have achieved exceptional community impact and have a demonstrated need. Organizations that have the experience and resources to conduct appropriate planning activities for a capital project without CoMF assistance are welcome to submit those plans to the CoMF Board of Directors for approval prior to applying for a Planning Grant. All plans must contain the CoMF Planning Grant components and requirements.

II. Eligibility

- a) To qualify for a Planning Grant the organization must be preparing a capital project within the City of Muskogee city limits. Projects consisting of only general upkeep (e.g.,

maintenance and repairs of existing capital or land) **are not** considered as “capital projects” by the City of Muskogee Foundation for the purposes of the Planning Grant process.

- b) New projects, as well as remodel and redesign of existing facilities / projects, are eligible.
- c) The applicant organization must be a nonprofit organization, educational institution or governmental agency.
- d) The applicant must demonstrate a successful record of programmatic, financial and administrative achievement.

III. How to Apply

- a) Eligible organizations may apply for a Planning Grant by completing a Planning Grant Application. The application is available by accessing your online account at www.cityofmuskogeefoundation.org then click the “Apply for a Grant” button.
- a) Applications are only accepted during the annual grant cycle. The deadline to submit and Application is February 15, 2017..
- b) During the application review process you may be contacted by a Foundation representative to arrange a meeting or answer additional questions.
- c) All materials submitted by your organization become the property of the Foundation and will not be returned.

IV. Requesting Funds

It is for your organization to decide the type of planning needed for your project. The capital project your organization ultimately proposes should be appropriate in cost and size relative to the budget and size of your organization.

There is no minimum or maximum for the amount of funds you may request for the Planning Grant. However, unless there are costs such as acquiring property or land, or other extraordinary circumstances and expenses, the maximum amount for a general planning grant will not exceed **\$50,000**.

Some examples of the types of Planning Grant activities that are eligible for funding include (but are not limited to):

- a) Accreditation Activities: Planning for such activities as national accreditation may require an experienced consultant, special training, or other types of preparation and may be considered;
- b) Accounting services: If the organization does not have audited financial statements, you may request support for historical audits for past years;

- c) Consultants: Professionals may be used to facilitate organization strategic planning or board development, conduct needs assessments, gather survey data or research, develop program measures or conduct an organizational audit;
- d) Fundraising and Financial Planning Activities: This may include feasibility studies, campaign planning, operating or solicitation plans, or board training. Experienced financial consultants may be used to help develop a financial operating and maintenance plan for a new facility;
- e) Input and Review from Experts: The organization may require the services of national experts in a specialized field such as audiology, theater design, developmental disabilities, food distribution, educational technology, museum design, etc.;
- f) Organizational and Strategic Planning: This may include program audits and constituency surveys, and/or outside facilitation of planning exercises with board and constituents to produce multi-year organizational plans;
- g) Preliminary architectural planning or highly specialized designer / planner assistance;
- h) Site acquisition fees or developer fees;
- i) Site surveys and environmental studies;
- j) Technology Planning: Developing a technology plan for a new facility that will integrate service data, financial information, outcome measurements, purchasing, or tracking systems;
- k) Training: Some conferences and workshops that will strengthen effective board and staff leadership may be considered;
- l) Travel by key planners to evaluate model facilities.

Some examples of the types of Planning Grant activities that are NOT eligible for funding include (but are not limited to):

- a) Architectural Selection Fees: Selecting an architect by creating a design completion or awarding a participation fee;
- b) Complete Architectural Planning: CoMF does not require full architectural services to be completed during the Planning Grant process. Only basic schematic drawings are necessary to determine adequate cost estimates;
- c) Direct Fundraising Activities or Publications;
- d) Dues or Fees: Dues or fees of any kind required by accreditation bodies or professional organizations;
- e) Future Financial Audits;
- f) Programs: Financial support for programming of the organization or any project outside the scope of the planned Capital Campaign / Construction;
- g) Salary Support: This includes support for current employees to conduct planning. The organization is expected to invest a portion of their time in the planning process.

V. Final Plan Required Components

If invited to apply for a Capital Campaign / Construction Grant, every organization must submit a comprehensive set of plans and documents related to the capital project. These plans must be provided even if the organization did not request, or receive, a Planning Grant from CoMF.

Plans submitted when applying for a Capital Campaign / Construction Grant must at a minimum include the following:

- a) An Executive Summary that includes: Rough order of magnitude of cost and size of construction project; a list of anticipated uses; a description of the proposed facility (construction type, design features, type of roof, foundation, electrical, HVAC systems, parking, etc.); proposed scope of construction improvements.
- b) Professional architectural drawings;
- c) Solid bids for the entire plan showing total cost for the project;
- d) A preliminary, three year pro-forma business plan that outlines maintenance costs, any anticipated operational expenses, all revenue projections and anticipated cash flow (if any);
- e) A preliminary timeline for construction and opening;
- f) The Guaranteed Maximum Price (GMP) or "Not to Exceed" contract for the project;
- g) Results of a feasibility study done for this project for the City of Muskogee. The study may be informal and consist of interviews of City leaders, local organizations in the area, funders, and businesses.
- h) Land acquisition needs;
- i) The names of the individuals on the leadership team that will be responsible for the project, including the name and qualifications of the Company's Representative;
- j) Identification of all funding sources;
- k) How you will recognize major donors to the project;
- l) A detailed explanation of how, and by whom, the project will be managed from start to finish.
- m) Other items may be requested by the Foundation that are specific to individual projects.

VI. Contact with CoMF

Questions regarding the application and other aspects of the Planning Grant process or about the Foundation are encouraged. Questions should be directed to:

Laura Wickizer, Grants and Office Administrator

City of Muskogee Foundation

Email: lwickizer@cityofmuskogeefoundation.org

Phone: (918) 577-6562

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