



Community Grant Fund Guidelines

Mission: *Westfield's commitment to community investment and business success is built on sharing knowledge and building trust. We achieve success by strengthening public awareness and understanding of insurance, supporting the institution of home ownership and economic health, and empowering people to take control of their lives.*

Community Grant Fund requests should demonstrate a clear connection to a community grant fund focus area:

Safety and Education – Westfield will consider supporting programs that:

- Promote safe choices and protection from hazards that relate to property and casualty insurance
- Strengthen public awareness and understanding of insurance
- Create innovative learning opportunities with emphasis on building business literacy for youth and adults

Human Services – Westfield primarily supports Human Services programs through donations to the United Way and will consider supporting additional programs that:

- Empower people to take control of their lives and work toward positive change

Restrictions:

The Westfield Insurance Community Grant Fund refrains from supporting:

- Organizations outside of Westfield operating territories
- Annual operating budgets for United Way agencies
- Individuals or individual endeavors
- Membership organizations (unless they are of benefit to the public)
- Religious, fraternal, labor organizations
- Program advertising
- Fundraising benefits, sponsorship or other events
- Individual attendance to conferences or seminars
- Individual youth and adult athletic teams and associations
- Multiple grant requests per organization per year
- Multi-year requests
- Capital campaigns
- Academic scholarship programs/student exchange programs (*programs supported by Westfield Insurance and Westfield Agents Association are not included in the Community Investment grant request process*)

Previous grants are not considered as precedent for additional support. Proposals should not be submitted in binders or videotapes, CD-ROMS and/or other costly manners.

Grant Request Format

If your organization's program aligns with one of Westfield's focus areas and does not fall within limitations, please submit one unbound copy of a proposal in the following format:

I. Application

Complete and submit the application included at the end of this document.

II. Cover Letter

On one page of the organization's letterhead, summarize the project: its purpose, the grant amount requested, the program activities and the population that will benefit from the grant.

III. Program detail (1- 3 pages)

Provide a written summary of your project or program detailing:

- Specific goals and objectives of the project or program and how they relate to your mission and a Westfield community grant fund focus area
- Statement of need including statistics or evidence of support
- How the grant will be used specifically
- Audience demographics (age, location, youth, adults, families, females, etc.)
- How many will benefit from the project or program
- Project or program budget
- Organization budget for current fiscal year with year-to-date status (project or program included as a line item)
- United Way funding received for the past four years, if applicable
- Explanation of efforts to minimize duplication within the community and/or collaboration with other partners
- Explanation of how the effectiveness of the project will be measured and communicated to Westfield and the community
- Description of expected exposure of sponsor, if applicable

IV. Attachments

- Organization's history and mission
- Identification of other organizations, including corporations, involved in funding and gift amounts committed
- Recently audited financial statements
- Most recent 990
- Endowment spending policy (if applicable)
- One example of each of the following:
 1. Annual report
 2. Organizational brochure
 3. Newsletter
 4. Program brochure
- IRS letter of determination of 501(c)(3)
- Name(s) of Westfield employee(s) and description of involvement, if applicable
- List of key staff members and qualifications, or an organizational chart
- Names and affiliations of officers of board members plus a brief narrative on the board's operations that answers the following questions
 1. Term limits of board members
 2. Standing committees of the board
 3. Fundraising responsibility of board members
 4. Frequency the full board receives financial reports
 5. Frequency of board meetings
 6. What (if any) long range or strategic plan has the board adopted

The Westfield grant review committee will review all requests for the above criteria before making final decisions to accept or decline a request.

Submitting the Grant Request and Follow-up

Submit application, cover letter, program detail and attachments to:

Westfield Insurance Community Grant Fund
One Park Circle
Westfield Center, OH 44251-5001

Deadlines for submission:

Grant requests are reviewed quarterly. Requests must be received four weeks in advance of grant review committee meetings to be considered, please note the schedule below.

Requests submitted by:

February 29, 2008
May 30, 2008
August 29, 2008
October 31, 2008

will be reviewed on:

March 28, 2008
June 27, 2008
September 26, 2008
December 5, 2008

Requests for grants less than \$15,000

Requests that meet the criteria are submitted to the grant review committee for consideration. Applicants are notified regarding the grant review committee's final decision within 45 days of submission.

Requests for grants \$15,000 and over

The Westfield Insurance Foundation Executive Director may contact the organization to schedule a meeting between appropriate representatives of Westfield and the requesting organization. Depending on the size and nature of the request, additional information not specified in the guidelines may be requested by Westfield.

Westfield Insurance Community Grant Application

Organization Information

Organization Name: _____

Date: ____/____/____

Address: _____

Contact Name / Title: _____

City, State Zip: _____

Phone with area code: _____

Employer Identification Number (EIN): _____

E-mail: _____

Community Grant Focus Area (circle one): Safety and Education

Human Services

Additional Information

Project name: _____

Project start date: ____/____/____

Project end date: ____/____/____

This application was prepared by: _____

Resources Requested: _____

Print name: _____

Signature: _____

If monetary, amount requested by organization:

\$ _____

Position with the agency: _____

Westfield Insurance contributions to this organization in the previous four years:

Year _____ \$ _____

Year _____ \$ _____

Year _____ \$ _____

Year _____ \$ _____

Are you a United Way affiliated agency? Yes No

If yes, provide the name(s) of the United Ways and the amount(s) your agency has received for the past four years in your program detail.

If a Westfield employee or partner agent is involved, please include comments below.

Comments: _____

Print Name: _____

Signature: _____

Daytime phone with area code: _____

Email: _____

Mail with additional program detail and required attachments:

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