



GUIDELINES AND POLICIES

Background

The Nonprofit Management Fund of Waukesha County was established in 1998 through a collaboration of foundations, corporations, and the United Way. The Fund's mission is:

to improve the management effectiveness and efficiency of nonprofit organizations and increase the resources for nonprofit management in Waukesha County.

PARTNERSHIP AND PROGRESS

The partners in the Fund are well aware of the enormous economic and environmental pressures that weigh on nonprofit organizations. Over the past year, several discussions at the Waukesha Nonprofit Management Fund grant meetings focused on possibilities of collaboration, similarities of missions, decreased funding opportunities, and potential duplication of services. Rather than continuing to talk, the funding partners chose to take action.

In 2008, the Nonprofit Management Fund of Waukesha County launched a new initiative to address these concerns. Three of the Nonprofit Management Fund partners joined resources with Waukesha County to establish a distinct funding pool to enable nonprofit organizations to consolidate resources and enter into formal partnerships.

Strategic Alliance Fund 2008 Partners

- ❖ Greater Milwaukee Foundation
- ❖ Northwestern Mutual Foundation
- ❖ United Way in Waukesha County
- ❖ Waukesha County Department of Community Development

Types of Projects Funded

Nonprofit organizations must have received a 501(c)3 tax designation and be located in Waukesha County. The lead organization must have an operating budget under \$3 million and have a mission that emphasizes human services.

The Strategic Alliance Fund is intended to help cover some of the costs that will be incurred by organizations ready to implement a **formal collaboration, negotiate a strategic alliance, co-locate to share back-office and other administrative functions, or restructure the corporations through a merger**. Grants may be awarded up to \$20,000 to supplement the organizations' own investments and that of other funding sources. Contracts from any technical assistance provider used in the project will need to be attached to the application.

Eligible expenses include, but are not limited to, consultation or training in the following areas:

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| ❖ Process Facilitation | ❖ Corporate Restructuring |
| ❖ Legal Assistance | ❖ Human Resource Integration |
| ❖ Board Development | ❖ Financial Systems Management |
| ❖ Technology and Facilities | ❖ Communications and Marketing |

Application

During the first year of the Strategic Alliance Fund, proposals will be accepted at any time. Upon completion, forward the application and all requested attachments to the Fund Advisor. During preparation of the application, the lead organization should call the Advisor to discuss the proposal and to address any questions.

Fund Advisor:

Pat Wyzbinski (414) 271-4869
fundadvisors@nonprofitmanagementfund.org

Strategic Alliance Fund
Nonprofit Management Fund of Waukesha County
2212 S. Kinnickinnic Avenue
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Review Process

Each proposal will be reviewed by the Fund Advisor who will schedule an interview to discuss the application. When all questions have been addressed, the Advisor will forward the proposal to the funding partners for consideration. Applicants may be asked to make a brief presentation to the funding partners at the time of their committee deliberation. Generally, proposals will be considered within 30 days of receipt. The applicant will be notified of the committee's decision as soon as possible.

An evaluation report describing the activities performed under the grant, along with financial documentation, must be submitted to the Advisor upon completion. The Advisor will supply the grantee with a standard format for the report.

Repeat Applicants

In order for a nonprofit organization to submit another application to the Strategic Alliance Fund, all commitments from the previous award must be completed, and the evaluation of that grant submitted to the Fund Advisor.