

Community Interests

The Foellinger Foundation awards approximately 15% of its grant dollars to nonprofit organizations that address other community issues, activities, and/or needs but do not directly serve children and families with the greatest need and least economic opportunity. The Foundation does this by identifying and funding mission-driven, well-managed, results-oriented organizations.

The Foundation most often awards grants to nonprofit organizations that are exempt from paying federal taxes under Section 501(c)(3) of the Internal Revenue Code and that are *not* private foundations.

Occasionally, the Foundation awards grants to governmental agencies for programs or projects that *enhance* the community's quality of life, so long as those *enhancements* would occur only with private contributions.

Grant Guidelines

Community Interests grant applicants may request one-year funding. Capital support grants will not be accepted. Organizations may only submit one application for operating or program support per calendar year beginning January 1, 2010.

Organizations <u>may</u> request:	Organizations <u>may not</u> request:
<ul style="list-style-type: none"> • Operating or program support • One-year support • Support for existing programs 	<ul style="list-style-type: none"> • Capital support • Multi-year funding • Support for new programs

Due date for grant applications

Category	Q & A Session 11:00 am	Grant Applications Due by 5:00 pm
Community Interests	2 nd Wednesday of January	1 st Monday in February

Timing of payments

Grant payments generally are scheduled to coincide with the recipient's fiscal year. The actual schedule depends on whether an organization submitted an application before the beginning of its fiscal year. If you would like clarification of our policy before submitting a grant, please talk with Foundation staff regarding the timing of grant payments.

The Foundation will rarely award grants:
<ul style="list-style-type: none"> ▪ To individuals, including scholarships, travel assistance or conference fees. ▪ For endowments. ▪ To support religious organizations for sectarian purposes. ▪ To fund project, program, operating or capital campaign deficits. ▪ For programs or projects that taxpayers normally support, including the general operations of individual public schools or school districts. ▪ For sponsorships, camperships, special events, advertising or group trips. ▪ For annual campaigns or appeals.

You will need the evaluation materials included in the left pocket of this folder to prepare your grant application. These evaluation materials may also be found on the Foundation's website at www.foellinger.org. Additional resources to help in preparing your grant application are also on the Foundation's website. These include: *Shop Talk*; Recommended Resources; Sample Budget Format; Sample Grant Agreement; Publicity Policy; and templates for completing your grant application.

➤ Step One – Grant Application Checklist

The Grant Application Checklist serves as the cover sheet for your grant application. Please attach the required documents on the checklist in the order listed below. For your convenience, grant application templates are provided on the Foundation's website at www.foellinger.org.

Type of organization (*Check only one box and submit appropriate document*):

- 501(c)(3) public charity with funding primarily from private sources. (*Private foundations may not apply*). If you checked this box, please submit a copy of your organization's current letter from the Internal Revenue Service advising that your organization is tax-exempt under section 501(c)(3) of the Internal Revenue Code and that your organization is not a private foundation. This letter must include information about the organization's status under Internal Revenue Code sections 107(b)(1)(A), 501(c) and 509(a). The name of the organization in this letter must be the same as the current legal name of the organization seeking the grant.
- Governmental entity.

Grant Narrative (*Please answer all of the questions on page 4. In your narrative, please rewrite each question from the application before writing your response. Templates are available for download on the Foundation's website (www.foellinger.org). Numbering the pages of your grant application narrative is appreciated.*)

Other documents (*Please submit all of the documents listed below.*)

- The Executive Summary (Parts A and B) outlining the essential elements of the grant narrative. The Executive Summary should align with the logic model and, if applicable, measurement framework.
- A one-page logic model completed as outlined in the grant application and evaluation packet.
- A one-page measurement framework, if applicable, completed as outlined in the grant application and evaluation packet.
- A copy of your organization's most recent strategic plan.
- Names and terms of your organization's board members or trustees (please list all officers).

Required financial documents

- A complete copy of your organization's most recent federal tax return (IRS Form 990).
- A complete copy of your organization's most recent audit report including a copy of the management letter. Please provide an explanation if an audit and/or management letter is not attached.
- A copy of your organization's general operating budget for the current fiscal year.
- A copy of your organization's proposed general operating budget for all future fiscal years for which you've requested funding under this grant application.
- For program requests, a line-item program budget reflecting current and anticipated expenditures and sources of funding for the fiscal year you've requested funding.

You may submit your budget(s) in the format used by your organization.

One copy of your checklist with all required documents should be submitted by 5:00 p.m. on the deadline date to:

Cheryl Taylor, President
Foellinger Foundation, Inc.
520 East Berry Street
Fort Wayne, Indiana 46802

▶ Step Two – Grant Narrative

You **must** answer all of the questions that are shaded in gray. Then, you must answer the questions for the type of grant support you are seeking. Operating support questions are highlighted in green and program support questions are highlighted in orange.

	= All Applicants	= Operating Support	= Program Support
MISSION-DRIVEN	<ul style="list-style-type: none"> Explain how the need(s) and/or issue(s) addressed by the organization are related to its mission. 		
	<ul style="list-style-type: none"> Describe how the proposed program supports the mission of the organization. 		
WELL-MANAGED: Strategic	<ul style="list-style-type: none"> How does the organization use its strategic plan to set organizational priorities, make financial decisions, and inform its general decision making? Please provide specific examples based on the strategic plan. 		
WELL-MANAGED: Financial	<ul style="list-style-type: none"> Discuss your revenue and expense trends. Include financial data from your last fiscal year, your current fiscal year (forecast), and the future year(s) (budgeted) covered by this grant. Please elaborate on the factors impacting these increase(s) or decrease(s). If you have increased the amount of funds borrowed (debt obligations) during the past year, please explain and identify your lending sources. If you reported an operating deficit for the most recent year, please discuss the key factors contributing to the deficit. Please explain what actions the board of directors and management have taken to address the deficit. Does your organization fully fund depreciation expense? If not, please explain how you fund asset replacements. What issue(s) and/or event(s) has the organization identified that could have a material impact on finances and/or operations? 		
	<ul style="list-style-type: none"> If the application is for program support, what other funding sources are you developing? 		
RESULTS-ORIENTED	<ul style="list-style-type: none"> Please provide specific examples of how the organization uses information and data from evaluation to make decisions that support the strategic plan. 		
	<ul style="list-style-type: none"> Please complete the logic model and strategic priorities framework for operating support. Please use the Guide to Program Outcomes and the Guide to Capacity Outcomes to develop your logic model and strategic priorities. 		
	<ul style="list-style-type: none"> Please provide a narrative explanation of your logic model and strategic priorities. 		
	<ul style="list-style-type: none"> Please complete the logic model and measurement framework for program support. 		
OPTIONAL	<ul style="list-style-type: none"> Please provide a narrative explanation of your logic model and measurement framework. 		
	<p>If there is additional narrative information you would like the Foundation to know about the work of your organization, please share. <i>(Please do not attach audio/visual items, pictures, letters of support, etc.)</i></p>		

▶ Step Three – Executive Summary (Parts A and B)

Part A

Fill out the form below, including required signatures. You may duplicate this form on your computer or use the form provided in the grant application template available for download from the Foundation's website at www.foellinger.org.

Please do not use font type smaller than 11 point.

Applicant Organization's Legal Name		Fiscal Year (mm/dd – mm/dd)	
Mission of Organization			
Street Address	City	State	Zip
Staff Executive		Title	
Board Leader	Term of Office	Title	
Key Contact	Daytime Phone	Email Address	
Type of Support Requested: <input type="checkbox"/> Operating <input type="checkbox"/> Program		Total Amount Requested: \$	

The signatures below confirm that the determination letter from the Internal Revenue Service submitted with this grant application:

- Indicates that the applicant organization is tax exempt under section 501(c)(3) of the Internal Revenue Code and is not a private foundation.
- Includes information about the applicant organization's status under Internal Revenue Code sections 170(b)(1)(A), 501(c) and 509(a).
- Indicates that the applicant organization's name is the same as the current legal name of the organization.

Required Signatures:

 CEO, President or Executive Director

 Board Chair or Board President

Executive Summary *(continued)***Part B**

Write below a one-page succinct summary of your grant request. Make sure it is in agreement with your narrative, logic model and, if applicable, measurement framework. The Foundation's Board of Directors receives a copy of your executive summary, logic model, and measurement framework (if applicable) for review. Please do not use font type smaller than 11 point.