



Grant Guidelines

The Morgan Family Foundation is a private family foundation based in Yellow Springs, Ohio and funded in December 2003 by Lee and Vicki Morgan. The mission of the Morgan Family Foundation is to be a vehicle of change by:

- broadening horizons and inspiring action through the power of education and experiential learning;
- building stronger, more inclusive communities; and
- providing opportunities to those willing to enact positive change in themselves or the world around them.

The Morgan Family Foundation invests its grant resources in nonprofit partners that are:

- preparing individuals to serve and lead the community;
- building healthy relationships in all kinds of families; and
- triggering bold, collaborative community projects.

Areas of Interest

The Foundation's foremost interest is in strengthening communities. Foundation grants primarily serve the communities of Yellow Springs, Ohio and St. Cloud, Minnesota, and their immediate vicinities. In addition, other communities and organizations that are supported by board and family members may receive grants from time to time.

The Foundation currently is accepting unsolicited grant requests for the benefit of St. Cloud, Minnesota and Yellow Springs, Ohio. For the remainder of 2019, the Foundation is not likely to fund any new grant requests seeking more than \$40,000. Applicants are strongly urged to keep their requests below that amount.

The Foundation awards approximately \$2 million in grants each year, with the vast majority of that sum distributed through the competitive grant process described below. The major components of the annual grants budget include:

- Program, Capital, and Operating Grants: We welcome grant requests in the \$10,000-100,000 range to support innovative program initiatives, capital requests, or operating needs.
- Large Grants: We also welcome grant requests in the \$50,000-200,000 range to launch significant community collaborations and serve as challenge grants.
- Major Initiatives: From time to time the Morgan Family Foundation will identify one or two major initiatives that will strengthen communities. Efforts to date have included community visioning and planning for a performing arts center in Yellow Springs, as well as the re-opening of an independent Antioch College.
- Capacity Building: Grant resources are available to invest in efforts to enhance the management and governance performance of charitable organizations in Yellow Springs, Ohio and St. Cloud, Minnesota, and their immediate vicinities.
- *New*. Advocacy: While the Foundation is prohibited from lobbying, we will consider funding permissible advocacy activities such as public education campaigns on a given topic, nonpartisan analysis study or research, training for nonprofits on how to engage effectively in advocacy, educating public policy makers on various issues, and nonpartisan election-related activity.

The Foundation is willing to accept requests for any type of grant, such as operating, program or project, start-up, capital/endowment, technical assistance, etc. With a primary interest in strengthening communities, the Foundation recognizes that this can be accomplished via many fields of programmatic interest. The

Foundation welcomes collaboration with other grantmakers and favors grantseekers with multiple sources of support.

Limitations on Grantmaking

The Morgan Family Foundation awards the vast majority of its grants to charitable, nonprofit organizations that are recognized by the IRS as 501(c)(3) public charities. Occasionally grants may be made to units of government. If a charitable project is being undertaken by an entity that does not have 501(c)(3) status, please contact the Foundation for eligibility. Generally, the Foundation will not:

- make grants to individuals or for the benefit of pre-selected individuals
- provide funds to lobby legislation or influence public elections
- support animal rights or animal welfare causes
- promote any particular religious doctrine
- serve as replacement funding for public programs
- finance medical research.

How to Apply

Grant applications are considered twice a year, at the May and November board meetings.

The Foundation currently is accepting Letters of Inquiry (LOIs) for the benefit of St. Cloud, Minnesota and Yellow Springs, Ohio.

<i>Steps in Grant Process</i>	<i>Winter/Spring Cycle - 2019</i>	<i>Summer/Fall Cycle - 2019</i>
Grantseeker submits letter of inquiry by	February 4	July 10
Foundation invites or declines full proposal by	February 22	August 6
Grantseeker submits full proposal by	March 20	September 5
Foundation notifies applicants of grant decisions by	May 29	December 9

Grantseekers should first review the grant guidelines to determine if their approach and funding needs are consistent with the Foundation's interests. Organizations which believe that there may be mutual interests then complete a letter of inquiry (LOI) through our online grant system, *eGrant* (<https://morganfamilyfdn.egrant.net>).

For the remainder of 2019, the Foundation is not likely to fund any new grant requests seeking more than \$40,000. Applicants are strongly urged to keep their requests below that amount.

Grantseekers are welcome to contact the Foundation with questions or to discuss their ideas with Foundation staff at any time, even before submitting a letter of inquiry.

For 2019 letters of inquiry are due no later than February 4 or July 10.

Foundation staff will contact each applicant, usually within four weeks of the letter of inquiry deadline, to either invite or decline a full application, which is also submitted online through *eGrant*. An invitation to submit a full application is no guarantee of a grant. This is an indication that the Foundation wants to hear more about the proposal because it appears to meet the basic requirements for funding. As time allows, the Foundation is also willing to visit and answer questions regarding a draft proposal before it is finalized.

For 2019 full applications are due no later than March 20 or September 5.

Upon receipt, each full application is assigned to a foundation program officer. S/he may contact the applicant with questions and schedule a site visit, if deemed necessary. Recipients will be notified of the grant decision within three weeks of the board meeting. Grant awards may include a reduction in the amount of funding, a full or partial matching challenge, a modified payment schedule, or other stipulations. Any restrictions will be described in the grant agreement, which will also specify a reporting schedule. Proposals that are funded generally have report requirements, including both narrative and financial information.

Grantee reports may be used as a learning tool to help other organizations and guide future Foundation funding.

Updated 6/5/19

Selected Glossary of Terms

Excerpted from The Foundation Center's [GrantSpace](#)

501(c)(3): The section of the tax code that defines nonprofit, charitable, tax-exempt organizations; 501(c)(3) organizations are further defined as public charities, private operating foundations, and private non-operating foundations.

Capital support: Funds provided for endowment purposes, buildings, construction, or equipment.

Fiscal sponsorship: Affiliation with an existing nonprofit organization for the purpose of receiving grants. Grantseekers may either apply for federal tax-exempt status or affiliate with a nonprofit sponsor.

General/operating support: A grant made to further the general purpose or work of an organization, rather than for a specific purpose or project; also called an unrestricted grant or basic support.

Start-up costs or seed money: A grant or contribution used to start a new project or organization. Seed grants may cover salaries and other operating expenses of a new project.

Technical assistance: Operational or management assistance given to nonprofit organizations. This type of help can include fundraising assistance, budgeting and financial planning, program planning, legal advice, marketing, and other aids to management. Assistance may be offered directly by the staff of a foundation or corporation, or it may be provided in the form of a grant to pay for the services of an outside consultant.

Glossary updated 3/06/12