



Grant Guidelines for 2020

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, especially those from marginalized and at-risk populations;
- building healthy relationships in all kinds of families and among various societal groups; and
- triggering bold, collaborative community projects that advance social equity.

Areas of Interest

While the Foundation's interest to date has focused on strengthening the communities of Yellow Springs, Ohio and St. Cloud, Minnesota, the Foundation is shifting its interests moving forward. In 2020 the Foundation will begin to realign its grantmaking around a few themes: social equity, mitigating global warming in Minnesota, and end of life issues.

The scope of our open, competitive grant application process in 2020 is limited to advancing social equity in St. Cloud, Minnesota and/or the immediate vicinity.

Social equity is central to our mission, as **we seek a just society in which all individuals have ample opportunities to thrive and outcomes are not determined by one's heritage, physical characteristics, beliefs, residence or inclusion in any particular group.** Social inequities directly challenge many different groups of people and in many different sectors of our society, and we all suffer when some are excluded from their full potential.

The focus of our competitive grantmaking in 2020 is the reduction of disparities for marginalized communities and at-risk populations in St. Cloud, Minnesota. This includes, but is not limited to, disparities and inequities of race, class, religion, gender, age, immigrant status, sexual orientation, and ability. As the Foundation learns more about social equity in St. Cloud, we may narrow our focus further for future competitive grant cycles.

The Foundation will accept requests for a variety of grant types in the equity arena, including:

- Program, Project, Capital, Start-Up and Operating Grants: We welcome grant requests to support innovative program initiatives, short-term projects, capital requests, start-up or operating needs.
- Capacity Building: Grant resources are available to invest in efforts to enhance the management and governance performance of charitable organizations serving St. Cloud, Minnesota and its immediate vicinity.
- *New:* Advocacy: While the Foundation is restricted in its ability to lobby, 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 welcomes collaboration with other grantmakers and favors grantseekers with multiple sources of support. Historically, we generally don't consider requests for less than \$10,000.

The Morgan Family Foundation expects to address its other emerging thematic interests (global warming in Minnesota and end of life issues) as we learn more about those issues, and potentially through Foundation-initiated grants. **To honor the family legacy in the Yellow Springs community, the Foundation has pledged three-year support through a fund in the Yellow Springs Community Foundation for 2020, 2021 and 2022 (contact the Yellow Springs Community Foundation for details on how to apply).** In addition, other communities and organizations that are supported by board and family members may receive grants from time to time.

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.

<i>Steps in Grant Process</i>	<i>Winter/ Spring Cycle - 2020</i>	<i>Summer/Fall Cycle - 2020</i>
Grantseeker submits letter of inquiry by	January 14	July 10
Foundation invites or declines full proposal by	February 7	August 13
Grantseeker submits full proposal by	March 6	September 9
Foundation notifies applicants of grant decisions by	May 27	December 4

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>).

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 2020 letters of inquiry are due no later than January 14 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 2020 full applications are due no later than March 6 or September 9.

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 and approved 11/20/19