



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, especially 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 grant making 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 grant making in 2020 is the reduction of inequities for marginalized communities and at-risk populations in St. Cloud, Minnesota. This includes disparities of race, class, religion, gender, age, immigrant status, sexual orientation, and ability, as well as inequities related to COVID-19. 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 will address its other emerging thematic interests (global warming in Minnesota and end of life issues) as we learn more about those issues, and 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. Please note the modifications to the process for the Summer/Fall Cycle in 2020 due to COVID-19.

<i>Steps in Grant Process</i>	<i>Summer/Fall Cycle - 2020</i>
Grantseeker submits letter of inquiry by	July 23
Foundation declines or invites for further consideration	August 26
Grantseeker completes interview with Program Officer	September 15 – October 7
Foundation notifies applicant of grant decision by	December 9

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.

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 through our online grant system, *eGrant* (<https://morganfamilyfdn.egrant.net>). **For the Summer/Fall Cycle of 2020, a Letter of Inquiry (LOI) will be the only written narrative proposal that grantseekers will need to submit.**

For the Summer/Fall Cycle, 2020 LOIs are due no later than July 23. Because we recognize the stresses and challenges which COVID-19 has brought to many nonprofits, **the Foundation is not requiring grantseekers to prepare a full written narrative grant application beyond the LOI.** Based on the LOIs submitted, the Foundation will select some applicants for further consideration and notify others of their decline. The Foundation's Program Officer will contact those who are invited to continue to schedule a follow-up interview about the grant proposal between September 15 and October 7, 2020. Prior to that interview, invited grantseekers will be asked to submit financial information about their organization and proposal.

An invitation to continue in the grant process is not a guarantee of a grant. It is an indication that the Foundation wants to hear more about the proposal because it appears to meet the basic requirements for funding. Final decisions about grants will be made at the Board meeting in November and 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.

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