



MORGAN FAMILY
FOUNDATION

Grant Guidelines – Social Equity

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 purpose of the Foundation is to advance the human condition. To further focus the Foundation's purpose, the members of the Foundation's Board of Directors have articulated several themes to guide our activities through 2024.

Our Themes/Areas of Interest

While the Foundation's interest historically has focused on strengthening the communities of Yellow Springs, Ohio and St. Cloud, Minnesota, the Foundation has shifted its interests moving forward. In 2021 the Foundation's grantmaking is centered on the following themes: social equity, mitigating global warming in Minnesota, and end-of-life issues. *These Grant Guidelines pertain only to our social equity theme.*

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.

To address our social equity theme, the Foundation will award grants in 2021 through two open, competitive grant application cycles. The scope of that grant program is limited to advancing social equity in St. Cloud, Minnesota and/or the immediate vicinity.

Social equity is central to our purpose, 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 2021 is the reduction of unfair disparities for disadvantaged communities and at-risk populations in St. Cloud, Minnesota and for positive change in attitudes, practices and policies that lead to equitable outcomes for those communities. This includes, but is not limited to, disparities and inequities 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.
- 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 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 is addressing its other emerging thematic interests (global warming in Minnesota and end-of-life issues) as we learn more about those issues, and primarily through Foundation-initiated grants. **To honor the family legacy in the Yellow Springs community, the Foundation has pledged three-year support for 2020-2022 through a fund in the Yellow Springs Community Foundation (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 - 2021</i>	<i>Summer/Fall Cycle - 2021</i>
Grantseeker submits letter of inquiry by	January 14	June 30
Foundation invites or declines full proposal by	February 8	August 3
Grantseeker submits full proposal by	March 8	August 31
Foundation notifies applicants of grant decisions by	May 28	November 24

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.

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. It 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.

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. Applicants 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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