

**ENDOWMENT CHALLENGE GRANT APPLICATION**

2023 GUIDELINES

Purpose:

Endowment Challenge Grants are matching grants supporting nonprofit organizations in building endowments in Linn County, Iowa. The matching endowment fund is opened and held at the Greater Cedar Rapids Community Foundation. Nonprofit endowment funds invest in the mission and the future of the organization by providing general operating support, stability during cyclical income variances, and income for areas of high importance to the organization.

DEADLINE:

The Endowment Challenge Grant deadline is Tuesday, September 12, 2023 at 4:30 p.m. CST.

ORGANIZATION ELIGIBILITY:

Nonprofit organizations that are at least seven years old (based on the date of the IRS letter of determination) and hold 501(c)(3) status may apply if they meet two or more of the following criteria:

* The organization is based in Linn County, Iowa
* The organization serves residents of Linn County
* An awarded Endowment Challenge Grant will only serve residents of Linn County
* The organization currently holds one or more nonprofit endowed funds at the Community Foundation. The fund(s) must have been opened AND have a balance at or above the $10,000 fund minimum at least one year prior to the date of application.

**Please Note:** Organizations that previously received an Endowment Challenge Grant are eligible to re-apply if five years or more have elapsed since the preceding matching grant was fully paid and/or the grant award period ended. However, first-time Endowment Challenge Grant applications are prioritized over re-applications.

INELIGIBLE ORGANIZATIONS:

* Organizations that do not meet two or more of the above criteria
* Organizations with a core religious mission

REQUEST AMOUNT:

$25,000 and five years to meet the match

ORGANIZATION SIZE AND MATCH LIMITS:

The Community Foundation assumes that large organizations will have more donors and has therefore placed a cap on the Community Foundation match per donor based on size of organization. There is no minimum size of contribution; every gift will be fully matched by the Community Foundation up to the maximum amount per donor. The Community Foundation will not award matching funds for contributions that were received prior to the notification of the grant award.

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| --- | --- |
| OPERATING BUDGET | MAXIMUM MATCH PER DONOR |
| $0-$750K | $5,000 (donor gift $15,000) |
| $750K-$2M | $2,500 (donor gift $7,500) |
| $2M+ | $1,000 (donor gift $3,000) |

Grantmaking Equity Statement

The Greater Cedar Rapids Community Foundation supports people and places that shape our community, through our broad multi-sector grantmaking strategy. The Community Foundation Board of Directors has adopted the following statement as it relates to implementing this strategy:

The Community Foundation prioritizes grant funding for nonprofit organizations that are deeply engaged in or actively working to improve organizational equity and justice practices. The foundation commits to providing learning and funding resources to assist in this transformational process.

These equity and justice practices may include, but not be limited to, employment practices, volunteer opportunities, and delivery of programs and services and should be considered as they relate to under-resourced communities or to legally protected characteristics, including race, color, religion, gender, national origin, ancestry, age, medical condition, disability, veteran status, marital status, sexual orientation, or any other characteristic protected by law.

**Grantmaking Equity in 2023:**

Please note that the Community Foundation is committed to providing learning and funding resources to assist in this transformational process.

* We recognize that engaging in equity and justice work takes time and commitment.
* Our commitment is to provide support to organizations to help with that journey.
* Learning opportunities in 2023 will be made available through the Nonprofit Network: <https://www.gcrcf.org/nonprofits/nonprofit-network/>

Our grant applications and scoring process now include a focus on applicant organizational equity and justice practices as we continue our commitment to work with and support our nonprofit community in this journey.

“Organization Equity Practices” is an added scoring criteria category related to the equity practices questions in the application. The new Organization Demographics Form must be completed and uploaded along with other required documents.

Please note that the related scoring criteria are not about assessing the diversity of the organization’s demographics, but whether demographic information has been collected and shared in the application. We understand that organization demographics and equity-related practices are specific to the local community and those being served.

HOW TO APPLY

* Use this document to prepare your application responses:
	+ Please verify response character counts.  *(Note: All character counts INCLUDE spaces.)*
* Prepare documents for upload:
	+ Download the required form(s) for this program and complete as needed.
* Request grant portal access:
	+ Nonprofits must select one person to act as the grant administrator for the organization. Then a log in and password must be requested for that individual. Instructions for obtaining portal access can be found here: <https://www.gcrcf.org/nonprofits/grants/how-to-apply/>
* Login to the Community Foundation website to:
	+ Update your Organization Snapshot before starting your grant application
	+ Complete the online grant application:
		- Use this prepared document to copy responses into the online grant portal.
		- Do not copy and paste from a PDF or from a formatted table into the online application.
		- Upload required documents.

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| APPLICATION CHECKLIST:  |  |
| * Application responses completed in this document
 | Recommended |
| * Organization Snapshot (including Board list) updated before starting the application online
 | Required |
| * Online application completed
 | Required |
| * **Organization Demographics Form completed and uploaded (new in 2023)**
 | Required |
| * Community Foundation budget form completed and uploaded (form available at bottom of grant program page on website)
 | Required |
| * Organization Statement of Financial Position AND Statement of Activities with end date no earlier than the end of the applicant organization’s fiscal year uploaded.

*The Statement of Financial Position (sometimes called the balance sheet) is a financial statement that reports the assets, liabilities, and equity of the organization on a given date. The Statement of Activities (sometimes called the income statement, the profit and loss statement, or the income and expenses statement) summarizes the revenues, costs, and expenses incurred by the organization during a specific period of time. (An example of a Statement of Financial Position and Statement of Activities can be found* [*here*](https://www.gcrcf.org/wp-content/uploads/2023/08/Example-Statement-of-Financial-Position-Statement-of-Activities.pdf)*.) (Governmental applicants should use department budget.)***NOTE: Failure to submit the required types of financial documents with the required date will make the submitted application INELIGIBLE.**  *If your organization does not have any of the above, contact program officer to discuss.* | Required |
| * Strategic Plan
 | Required |
| * Budget Explanation *(explaining unusual circumstances, one-page maximum)*
 | Optional |
| * Supplemental materials
 | Optional |

Who can see this information?

Staff and grant committee members review all grant application materials. Committee members receive two additional resources about applicant organizations:

* A list of all grant awards during the last five years from the following Community Foundation funds: Funds for the Community, Program Support Grants, Organization Support Grants, Endowment Challenge Grants, and Linn County Grants
* A financial summary from submitted IRS-990’s for the last five years.

Questions?

Contact Rochelle Naylor, Senior Program Officer, at rochelle.naylor@gcrcf.org or at 319.774.2373.

APPLICATION QUESTIONS

**Pre-Qualifying Questions:**

Have you updated your organization snapshot in the last 12 months?

Does the organization have 501(c)(3) status?

Is the organization at least seven years old (based on the date of the IRS letter of determination)?

**Proposal Title:**

*(50 character-limit)*

**Section 1: Proposal Summary**

*Nonprofit organizations must meet two or more of the following criteria with this application: The organization is based in Linn County.*

* *The organization serves residents of Linn County.*
* *An awarded Endowment Challenge grant will only serve residents of Linn County.*
* *The organization currently holds one or more agency endowed funds at the Community Foundation. The fund(s) must have been opened AND have a balance at or above the $10,000 fund minimum at least one year prior to the date of application.*

*If the applicant does not meet the minimum of two criteria, please contact the program officer before continuing.*

Organization name: *(This will auto populate from Organization Snapshot)*

Proposal Summary Statement: Please provide a two-three sentence summary of the project. *(This may be used in publications such as the Community Foundation website, annual report, and other print or online publications.) (300-character limit)*

Dollar amount requested: $25,000

**Section 2: Organization Overview**

*All of these fields are auto-populated based on information in the Organization Snapshot.*

Mission statement: *(500-character limit)*

Brief organizational history: *(900-character limit)*

Target population description: *(250-character limit)*

Description of key programs: *(1,500-character limit)*

Please provide the number of individuals served annually: *(This calculation should count each individual once, regardless of the number of activities or services the person may have accessed.)*

Number of paid employees:

Total dollar amount of the current fiscal year organizational budget:

Fiscal year end date: *MM/DD*

Description of volunteer support within organization: *(250-character limit)*

Charitable status: 501(c)(3), governmental or requires fiscal sponsor

IRS Ruling Year: YYYY

IRS Effective Date of Exemption (optional): MM/DD/YYYY

List of Board of Director names and professional roles: *(Do not copy and paste from a PDF or from a formatted table.)*

**Section 3: Organization Practices**

Describe how the organization’s board and leadership staff work together in managing overall organization strategy and planning. *(1,000-character limit)*

Is commitment to equity and justice reflected in the organization’s mission, vision, values, board leadership, and/or overall strategy? Yes/No

If yes, please describe where equity is reflected specifically. If no, please explain*. (2,000-character limit)*

What equity strategies does the organization use within its operations? *(2,000-character limit)*

What equity strategies does the organization use in serving the community? *(2,000-character limit)*

***Please note:*** *The Community Foundation Organization Demographics Form must be completed and uploaded to complete this application.*

**Section 4: Organization and Community**

Describe the organization’s value to the community, including its economic impact. *(2,000-character limit)*

Describe how the organization is supported by the community. *(2,000-character limit)*

Describe how the organization utilizes relevant resources, connections, and networks both in the community and more broadly. *(2,000-character limit)*

**Section 5: Organization Impact**

Describe the organization’s data capacity for assessing programmatic impact. *(1,000-character limit)*

Describe the organization’s accomplishments and impact in the past year, including summary metrics and outcomes if possible. *(2,000-character limit)*

Describe the anticipated impact of receiving the funding requested in this application*. (2,000-character limit)*

**Section 6: Organization Sustainability**

What is the organization’s vision of itself in 5 years? 25 years? How will this endowment grant help the organization achieve its vision? *(2,000 character-limit)*

What is the organization’s capacity to deal with leadership succession? Please summarize the organization’s approach. *(1,500 character-limit)*

Why is this the right timing for the organization to receive an endowment challenge grant? Address internal organization circumstances and external fundraising climate. *(2,000 character-limit)*

**Section 7: Organization Contact Information**

*This will auto populate from the Organization Contact Information in our system.*

Tax ID:

Name of organization primary contact and organizational role: *This must be the Executive Director, Board Chairperson or organization President*

Address information:

Website address:

Organization phone number:

Primary contact phone and extension:

Primary contact email:

**Section 8: Submission Information and Signature**

Name of the person we should contact with questions regarding this specific application:

Application contact’s organizational role:

Application contact’s phone and extension:

Application contact’s email:

Submitter’s name/Electronic Submission Authorization:

Submitter’s organizational role:

TO COMPLETE THE APPLICATION

Please open each section of the application, including the ones you do not need to answer for this application. (If that section is not required for this request type, simply click "Save and Go Next" to move to the next section.)

The Submit button will appear when all sections are complete with green check marks and all mandatory documents are uploaded.

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**ENDOWMENT CHALLENGE GRANT SCORING CRITERIA**

A strong application will provide compelling reasons for the Community Foundation to invest in this organization.

Organization and Community *(maximum 5 points)*

* Organization provides value to the local community
* Organization has significant support from the community
* Organization effectively utilizes relevant resources, connections, and networks both in the community and more broadly

Organization Impact in Community *(maximum 5 points)*

* Organization’s work has measurable impact given the organization's size and longevity
* Organization has both short-term and long-term goals and a plan for achieving them
* Organization plan for coming year reflects both current realities and vision for its future

Impact of Proposed Project OR Impact of Requested Funding *(maximum 5 points)*

* Anticipated impact clearly stated/appropriate
* Anticipated impact is aligned with organization’s mission/goals

Organization Leadership and Financial Management *(maximum 5 points)*

* Organization has existing strong governance practices in place
* Organization budget is balanced and appropriate to age, circumstances, and size

Organization Equity Practices *(maximum 5 points)*

* Organization collects and has shared current organizational demographics for both board and staff in this application
* Organization’s commitment to equity and justice is reflected in their self-description and strategic documents
* Organization’s commitment to equity is reflected in their internal operations
* Organization’s commitment to equity is reflected in how they serve the community

**Total Score** *(maximum 25 points)* \*

*\* See next page for additional information about scoring matrix values.*

SCORING MATRIX VALUES

|  |  |
| --- | --- |
| SCORE | MEANING |
| 1 | Unacceptable response:* None provided
* Demonstrating a significant misunderstanding of the question
* Not meeting the criteria even to a minimum extent
 |
| 2 | Weak response:* Meeting certain aspects to a minimum extent but fails in others
* Little evidence of ability to meet or deliver to the proposed criteria
 |
| 3 | Fair response as:* Meeting the majority but not all aspects of the criteria
* Adequate evidence of ability to meet or deliver to the proposed criteria
 |
| 4 | Good response:* Meeting all aspects of the criteria
* Comprehensive, clear proposal demonstrating a good understanding of the criteria
* Clear evidence of ability to meet or deliver to the proposed criteria
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| 5 | Response which exceeds criteria:* Materially exceeding the criteria, through a creative or innovative response or where additional ‘added value’ areas have been identified
* Clear evidence of ability to exceed the proposed criteria
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