Dean & Margaret Lesher Foundation
Grant Guidelines & Application Instructions

GUIDELINES

The Dean & Margaret Lesher Foundation's mission is to enhance the quality of life for all residents in Contra Costa County, California, through support of children & families, education, and arts & culture. These guidelines are designed to assist organizations seeking such grants.

Eligibility

The Foundation makes grants only to organizations that are exempt from federal tax under section 501(c)(3) of the Internal Revenue Code, and are not classified as private foundations under section 509(a) of the Code.

Geographical Limitations

Grants are limited to qualified nonprofit organizations located in or directly serving residents of Contra Costa County, California.

Areas of Interest

The Foundation funds programs or projects in three focus areas:

- Children & Families
- Education
- Arts & Culture

Grant Types/Application Processes

The Foundation has established three different processes for grant application submissions:

- **Responsive Grants:** our traditional grants program, whereby nonprofit organizations apply for a grant (using these guidelines) in one of three focus areas: education, arts & culture, or children & families
- **Campership Grants:** a special responsive grant with a shorter, streamlined application
- **Impact Grants:** we proactively identify grantee partners to meet one of four distinct Impact goals (below), and asks those specific partners to submit a proposal

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A Note About Impact Grants and Proposals: At the Lesher Foundation, we are developing intentional programming and partnerships to achieve four distinct goals for our new Impact Grants program. These Impact Grants go above and beyond our long-time Responsive Grants program—meaning we will continue to respond

to nonprofit needs as they are proposed to us, and we will still accept unsolicited proposals for this responsive program, as we always have. If we identify a possible fit for one of our Strategic Impact Grants, we will reach out directly to that grant applicant to request a proposal.

While we continue to welcome and encourage unsolicited proposals for our Responsive Grants and Campership programs, the Foundation will proactively identify and contact organizations that qualify for the Impact Grants program. If you are a current grantee and have a question about whether you are Responsive partner or a potential Impact partner, we welcome you to call us. We are happy to answer any questions you might have.

Impact Goals for 2019-2024

1. More children are thriving through learning opportunities and stronger families—in time, resulting in educational and economic mobility.
2. More families have their basic needs met in housing, food, and interpersonal safety.
3. Contra Costa County, with the Lesher Center as the hub, is a premier arts and culture center providing access to the arts for all in the region.
4. East County nonprofit organizations gain more capacity to meet the communities' changing needs and reduce long-term poverty entrenchment.

Responsive Grant Application Deadlines

The Foundation will review responsive grant applications in the **Children & Families** and **Education** focus areas three times during the year: January, May, and September. Deadlines to submit applications are:

- December 1st at 5:00 PM Pacific Time
- April 1st at 5:00 PM Pacific Time
- August 3rd at 5:00 PM Pacific Time

The Foundation will review **Arts** grant applications (both responsive applications and impact applications) at the Summer board meeting. The deadline to submit Arts proposals is May 1st at 5:00 PM Pacific Time.

Campership Policy

Beginning in 2020, the Lesher Foundation is implementing a new funding approach for camperships. The Foundation will fund up to 10 camperships annually at an amount not to exceed $5,000 per program. Campership awards will be one-year grants.

Campership awards are defined as funds for short-term (typically one to two weeks) summer camps for children that allow them to experience environments and structured activities away from home. Priority will be given to camperships for low-income children and youth, underserved populations, populations with special needs or circumstances, and programs that emphasize the participation of children and youth from Contra Costa County. As is the case with all Lesher Foundation grants, funding can only be awarded for programs and services to residents of Contra Costa County. Programs currently funded by the Lesher Foundation that include a camp

component as part of a larger, comprehensive youth development program are NOT eligible to apply for additional funding via the Foundation's campership program.

The campership program has a separate simplified application located on the "Apply" tab of the Foundation's online electronic grants management system. Applications are due by March 1st each year, with notification of campership awards to be made no later than April 15th. For camperships that are awarded funding, a brief report back to the Foundation will be due by December 1st of that same year.

As with any and all questions regarding Lesher Foundation policies or programs, if you have any questions, please do not hesitate to contact the Foundation office.

Funding Limitations

The Foundation does not generally provide support for:

- grants to individuals, conferences, travel costs, or loans
- environmental and open space issues
- grants for start-up organizations
- health care issues
- general fund drives, fundraising events, annual appeals, or endowments
- debt retirement or deficits
- organizations in support of activities to influence legislation
- other foundations

Additionally:

- The Foundation does not assume an obligation for permanent support of any activity.
- After establishing a funding relationship, the Foundation is happy to review and consider multi-year funding.
- The Foundation will not consider full proposals from any organization more frequently than once every twelve months.
- A Letter of Inquiry (LOI) is required from all applicants who have never had a funding relationship with the Foundation.
- Grant awards will generally comprise no more than 25% of any nonprofit's total budget.
- The Foundation will consider capital grant applications from current or past grantees only.

APPLICATION INSTRUCTIONS – E-GRANT SYSTEM (FOUNDANT)

The Dean & Margaret Lesher Foundation accepts all Letters of Inquiry, grant proposals and grant reports via our E-Grant System (Foundant).

New Applicant Update COVID-19: As the Lesher Foundation works to respond to the needs arising from the impacts of COVID-19 on individuals, families, and communities in Contra Costa, we have made a decision to not consider new Letters of Inquiry for the next 6 months. Due to the crisis and the deep impact on our community and current nonprofit partners, we will be focusing our work with current partners. We will re-open our Letters of Inquiry process for new applicants in the fall.

A Message to Returning Grantees: As of 2019, the Lesher Foundation has changed our application procedures. In an effort to streamline the application process, and make it easier on you, our grantee partners, we have incorporated the following changes:

1. All campership applicants will complete a separate, condensed grant application.
2. All grant awardees will be notified via email, and the grant contract will be found on the grantee's online dashboard. The grantee will execute the grant contract online as a Follow Up Form.
3. In addition to executing the grant contract, the grantee must upload their organization's board minutes, confirming the terms of the grant, as a grant contract Follow Up Form, found on the Dashboard.

If you experience issues completing the contract or uploading the required documents, or if you have questions at any time, please contact the Foundation office at 925-935-9988.

ACCESS THE E-GRANT APPLICATION SYSTEM HERE

In Foundant, you will see four main sections:

- User Registration
- New Applicant Process – begins with a Letter of Inquiry
- Returning Applicant Process – begins with the grant application
- Grant Reports (these appear as Follow Up Forms)

The applicant is the person responsible for completing a grant proposal for the organization. The grant proposal process includes submitting a Letter of Inquiry (for new applicants only) and completing an Application Form, including the required attachments requested in the form.

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1. Register as a User (for new applicants only)

The first step is to create a new account for the nonprofit organization seeking a grant, including the primary contact and the chief executive officer of the organization.

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2. Submit Letter of Inquiry (for new applicants only)

If your organization has never had a funding relationship with the Lesher Foundation, you need to complete a Letter of Inquiry (LOI). The LOI is a form accessed through Foundant at the New Applicant Process link, introducing your organization to our Foundation. We request a brief

description of your applicant organization, how grants funds would be used, and the intended amount of the grant request. The Foundation promptly reviews all submitted LOIs, and invites (through email) selected organizations to the Application stage.

When preparing an LOI, answer the questions on the form paying close attention to the instructions for each question. We recommend you prepare longer responses in Word, and then cut and paste the information onto the form. Some questions have a character limit that allows only a specific amount of text. If you are preparing the LOI in Word prior to submission, you may access the LOI questions by using the Question List feature found on the right side of the LOI form.

Please Note: Required fields are denoted with an asterisk (*). If you leave a required field blank on the LOI Form, the system will not process the request. Fields with missing information will be denoted with a *Field is Required* Please be sure to fill in all required fields; the system will not allow you to submit the LOI if a required field is blank.

When submitting an LOI, an applicant can select *Submit Form* (when the LOI is complete), or *Save as Draft*, giving you the ability to return and complete the form at a later time. Once you click *Submit Form*, you will see a Confirmation Page indicating that you have successfully submitted the LOI.

Be sure to make all necessary edits prior to submitting the LOI. Once you submit the LOI, you can no longer edit your responses that you entered on the form fields. If you do need to edit your LOI *after* submitting it, please contact the Foundation office and we will either move the LOI back to draft status, or make the edits for you.

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3. Access Forms after Saving and Submitting an LOI (for new applicants)

Once the Foundation approves or denies an LOI, we will send an email to the primary contact's email address, and the decision will appear on your (the applicant's) Dashboard next to LOI. If the Foundation approves the LOI, you will gain access to the Application Form. If the Foundation denies the LOI, the grant proposal process will end for this cycle. You must wait 12 months before submitting a new LOI.

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4. Complete the Application (for returning applicants, or those with an approved LOI)

If an applicant has a current or prior relationship with the Foundation, or the Foundation has approved a Letter of Inquiry (for new applicants), the next step in the grant proposal process is to complete an Application.

Answer the questions on the form paying close attention to the instructions and limitations on each question. Similar to the LOI, some questions have limits in terms of character count or file size. The system allows plenty of space to provide responses; however, it will not permit you to exceed any of the limits.

Please Note: Required fields are denoted with an asterisk (*). If you leave a required field blank on the Application Form, the system will not process the request. Please be sure to fill in all required fields; the system will not allow you to submit the Application if a required field is blank.

When submitting an application, you can select *Submit Form*, or *Save As Draft* and return to complete the form later. You may also view the LOI form (if submitted) while completing the application; however, you cannot edit the LOI at this stage of the grant process. Once you click *Submit Form*, you will see a Confirmation Page indicating that you have successfully submitted the Application.

Be sure to make all necessary edits prior to submitting the LOI. Once you submit the LOI, you can no longer edit your responses that you entered on the form fields. If you need to edit your LOI or application *after* submitting it, please contact the Foundation office and we will either move the application back to draft status, or make the edits for you. In addition, we can also upload large files and/or additional files needed to complete the Application.

The system automatically notifies the Foundation when an Application is submitted, and you can refer to the Dashboard at any time to check which stage your Application is in.

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5. Submit Supplemental Information

Nonprofit organizations submitting an Application must provide supplemental information pertaining to finances, management, and board governance. The following is a list of documents that may be requested with the Application Form:

- Organizational Financial Budget (Note: when applying, if your organization is less than six months in its current fiscal year, please use the prior fiscal year. We need the most complete financial snapshot you can provide.)
- Balance Sheet or Statement of Financial Position (see note above)
- Income Statement or Statement of Activity (see note above)
- Program or Project Budget (see note above)
- Financial Audit Report, if applicable to your organization
- Brief résumé of the executive director and key staff
- Board Roster, including organizational affiliations

Note: If you need to convert a hard copy document to a digital file and do not have access to a scanner, you may convert the file through our Fax to File online tool. See #7 below for more details.

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6. Select the Grant Request Type

As part of the Application Page, you will select the type of grant for which your organization is applying. The Foundation makes the following type of grants:

- Program or Project Specific Support

- General Operating Support
- Capital Support

The Foundation defines grant request types as follows:

- **Program and Project Support**: This is restricted funding to support new or existing programs or services. Funded programs are generally offered from year to year, and are led by experienced staff members who are trained and qualified to direct program activities. If you are applying for Program and Project Support, be sure to establish the project start and end dates prior to submitting a request. *Please Note:* The Foundation does not fund grant programs retroactively.

- **General Operating Support:** Funding is unrestricted, meaning the organization directs funds to where they are needed most. The Foundation will seek to understand the applicant organization in terms of purpose, strength, and demonstrated ability to successfully deliver programs and community impact. The Foundation typically considers General Operating Support for returning applicants/partners.

- **Capital Support**: These funds pay for the purchase, construction, and/or remodeling of a building or facility, as well as funds for furnishings and fixtures.

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7. Convert Hard Copy Documents to File, as Needed

If you have hard copy documents and you don't have access to a scanner, you can use our online Fax to File tool. This tool allows you to convert hard copy documents by faxing it to our host server, which will create a PDF that you can upload as part of the application process. You will find more detailed instructions in our E-grants system.

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8. Awaiting a Grant Decision

Foundation staff may contact your organization during the review period to arrange for phone interviews, site visits, or to request additional information. The Foundation announces grant decisions following each grant review board meeting.

We will notify you of the decision by email, and additionally, you can check the status on your applicant Dashboard for updates on whether the Foundation has approved or denied your grant. All board decisions, along with grant contracts, will appear as a Follow Up Form on your Dashboard, if your application is approved for funding. You will receive an email with instructions.

If approved, the system will prompt you to upload to your Dashboard: 1) the online executed grant contract, and 2) a copy of your organization's board minutes confirming the terms of the grant. You can generally expect to receive a grant check within 45 days after you upload these documents.

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9. Grant Reports

The Lesher Foundation requires grant reports from all grantees, as follows:

- If you receive a one-year grant, a grant report is due at the end of the contract period, and we do not review new grant applications until the grant report has been submitted.
- If you receive a multi-year grant, a grant report is required at the end of each year, and submission and approval of the report triggers the next payment. As with all grants, a final report is due at the end of the grant; new applications will not be reviewed until the final report has been submitted and accepted.
- As a friendly reminder, all grantees will receive an automated email two weeks before the report is due, letting them know about the impending submission timing.

Grant Reports appear as assigned Follow Up Forms on your Dashboard. Please submit all Grant Reports using our online E-grants system (Foundant).

- You can find blank report forms on your grantee Dashboard. In Foundant, grant reports are referred to as Follow Up Forms. The Follow Up Form is called Report Form – Year 1 Report, Year 2 Report, Year 3 Report, or Final Report.

To access a blank report form, go to the far-right side of the page and click on the word Edit—the blue font is a hyperlink and will take you to the form.

Questions?

If you have any questions regarding the letter of inquiry, grant applications, capital grant process, or grant reports, we welcome you to contact Nilofar Gardezi, Program Officer and Grants Manager, at ngardezi@lesherfoundation.org or 925-935-9988. In addition, we are providing a link to an Application Video Tutorial, which we hope you find helpful.