



2010 Grant Guidelines

Commitment to Informed Grantmaking

In addition to the guidelines listed below, St. Luke's Episcopal Health Charities (the Charities) takes great care to assure that all of its grantmaking decisions are informed by research. Due diligence is performed on all new grant applicants to assure the organization is an effective and healthy nonprofit and the request is not for an unnecessary duplication of an existing service. After a grant has been awarded, grantees are required to provide annual grant reports and evaluations using the Charities' grant evaluation tools. These tools consist of five outcomes templates. There is a template for each type of program we fund (e.g. operations, health clinic, family social service, after school/childcare and homeless). The written evaluation, along with phone calls and site visits, help us to determine the success of the project and/ or make needed adjustments. In addition, the Charities' community-based research helps to inform our grantmaking and develop strategies for addressing the needs of a specific neighborhood or population.

Eligibility

The Charities makes grants to nonprofit, tax exempt organizations. To be eligible, an organization must have received an Internal Revenue Service Determination Letter indicating that it is an organization described in Section 501(c)(3) or 170(c) and is not a private foundation within the meaning of Section 509(a) of the Code. The Charities does not give grants directly to individuals or other grantmaking foundations.

The Charities provides grants only to organizations that serve the underserved within the 57 counties that make up the Episcopal Diocese of Texas. A list of counties can be viewed at <http://www.slehc.org/Grants/Detail/ServiceArea.cfm>.

Applicants are not required to be affiliated with any Episcopal Church or the Episcopal Diocese. However, first-time applicants affiliated with the Episcopal Diocese of Texas must provide the Charities a letter of support from the Diocese before submitting their application.

Please contact Celene L. Meyer, Director of Grants and Evaluation, at 832-355-4984 or cmeyer@sleh.com for information.

The Charities typically only gives grants for a one-year period and usually considers only one application from an organization within a calendar year. The Charities has a competitive annual grant renewal process based on the previous year's grant evaluation reports, Charities' priorities and available resources. Renewal grants may be reduced by a minimum of 10% each year. No proposal from an organization previously funded by the Charities will be considered unless the grantee provides a complete and timely grant report detailing how funds were expended and describing grant outcomes, using both qualitative and quantitative measures contained in the Charities' Evaluation Tools. Evaluation forms, guidelines and tools can be found on our Web site at http://www.slehc.org/Grants/Evaluation_Tools.cfm.

How to Apply

The Charities requires all applicants to apply online. The application can be accessed through our Web site at www.slehc.org. Click on Grants, and then Apply for a Grant. The Charities has created one application form to be used for both new and renewal requests. The form includes:

1. Contact information
2. Organization history and information
3. Project information
4. Evaluation plan and report criteria
5. The final page lists required documents and allows you to upload and attach electronic versions of the documents to the application before submitting the application to the Charities.

To access the online application the applicant is required to enter the organization's IRS Tax ID Number, and select the county in which services are to be performed. The system automatically searches for the Tax Id Number in the 990's database stored on GuideStar. If no match is found, access will be denied. Applicant may contact GuideStar directly at www.guidestar.org to inquire why the 990 was not on file. Also, if the county selected is not within our 57-county service area, access will be denied. Tips on completing the online application are at www.slehc.org under Grants/How to Apply.

Required Supporting Documentation

New Applicants

Most current Certified Audit – If a young agency, send the last fiscal year's certified statements and current IRS Form 990.

A copy of the organization's letter from Internal Revenue Service confirming the organization's current tax-exempt status under Section 501(c)(3) or section 170(c).

A current list of the organization's board of directors and their affiliations.

The organization's current annual operating budget, including revenues and expenses, and the amounts and sources of committed and pending funds.

If applicable, a budget for a specific project, in addition to the operating budget. Include a description of each major expenditure category.

Cover letter is optional (one page only)

ONLY FOR FIRST-TIME APPLICANTS AFFILIATED WITH THE EPISCOPAL DIOCESE: A letter of support from the Episcopal Diocese is required.

Renewal Applicants

The organization's current annual operating budget, including revenues and expenses, and the amounts and sources of committed and pending funds.

If applicable, a budget for a specific project, in addition to the operating budget. Include a description of each major expenditure category.

A current list of the organization's board of directors and their affiliations.

A copy of the organization's letter from Internal Revenue Service confirming the organization's current tax-exempt status under Section 501(c)(3) or section 170(c).

Cover Letter is optional (one page only)

Required Grant Reporting documentation – Evaluation Reports and Forms for previous year's grant must be submitted:

- Annual Grant Report – Narrative
- Financial Evaluation Report
- Operations Profile (Spreadsheet)
- Program-specific Measures – Template that best fits the program
- Spirituality Report – share a story (optional)

The Charities Does Not Provide

- Grants to individuals
- Grants to religious organizations for religious purposes
- Testimonial dinners, fundraising events or marketing events
- Grants intended directly or indirectly to support candidates for political office or to influence legislation
- Grants to government agencies
- Grants to other grantmaking foundations
- Grants to cover past operating deficits or debt retirements
- Grants to parks, playgrounds, or camps
- Grants to primary or secondary private or public schools
- Grants to hospital operations, internal programs, or event sponsorships

Priority Funding Areas

The Charities' special areas of interest for funding are:

- Wellness and disease prevention
- Physical, dental and emotional well-being
- Congregational Health Ministries

Types of Support

Grants are made for the following purposes:

- Operating support
- Program or project support
- Matching or challenge grants
- Capacity building grants to support organizational effectiveness and/or leadership development
- Limited capital requests by invitation only

Inquiries

Applicants are to direct all grant questions and inquiries to Celene Meyer, Director of Grants and Evaluation, at 832-355-4984 or cmeyer@sleh.com.

Grant Application Deadlines

The Charities has three grant application deadlines per year: 5 p.m. on the first working day of January, April and July. Applications are required to be submitted through our online application process at http://www.sleh.org/Grants/Grant_Application.cfm. Applicants may submit their applications online on any day prior to each deadline. Grant award decisions are made by the board approximately 90 days after each grant deadline.

Grant Notifications

The Charities will send out an e-mail notification of receipt of the application within 10 working days after each deadline. The staff will contact applicants if additional information is needed.

E-mail notifications for both awards and denials are distributed within 48 hours after each board meeting.

Grant awards, along with the award letters and grant agreements, are usually mailed out within three weeks following a grant decision meeting. Grantees are to sign and return the original agreement within ten days of its receipt.

What We Look For in Nonprofits

The Charities looks to fund healthy nonprofits as described in the Elements of a Healthy Nonprofit by La Piana Associates, published by Grantmakers for Effective Organizations in January 2003. Elements of a healthy nonprofit are:

- Healthy governance function
- Competent executive director
- Sound financial management system
- Workable, legal, human resource policy and practices
- Successful fund development strategy
- Clear, consistent message
- Good program that advances the mission

In addition, the Charities looks for applicants that have:

- The ability to meet the greatest needs of a general population;
- A clear understanding of the underserved community and the population they serve, supported by current data;
- A strong case for funding, which includes input from the people they serve, other service providers, and community stakeholders;
- The support of 100% of their board members, financial support where possible or in-kind support;
- A collaborative culture and strong partnerships to prevent unnecessary duplication of services;
- Funding from multiple (five to seven) sources;
- An effective plan for sustaining the project after Charities' funding ends; and
- A sound grant evaluation plan and report criteria that describes what are the expected goals/outcomes and how they will be measured.

Not All Projects Can Be Funded

The Board of Directors for the Charities has responsibility for the final approval of each grant. Since the Charities receives funding requests that far exceed our grants budget each year, we cannot fund every worthy project. A decision not to fund a proposal does not reflect on the merits of the proposal or the applicant organization.