



 **Foundation  
for Louisiana**  
*At work for resilient communities.*

*Grantmaking  
Guidelines*  
CYCLE 1

On May 23, 2011 the Louisiana Disaster Recovery Foundation transitioned into the Foundation for Louisiana. This evolution parallels the shift in Louisiana's priorities, from rebuilding what was lost in the storms to an intensified focus on addressing the historic challenges of poverty and neglect that constitute a standing threat to Louisiana's future and inhibit community resiliency both in and out of disaster times.

The Foundation for Louisiana defines its work in terms of the future we seek to create – a future of strengthened communities characterized by resilience and opportunity. Thus, Foundation for Louisiana staff and leadership are working to remove institutional and structural barriers to economic wellbeing, increase access to opportunity and cultivate local leadership in our state's most marginalized communities. As the Foundation for Louisiana moves forward with this important work, we are committed to building upon the accomplishments and lessons learned during our first five years as the Louisiana Disaster Recovery Foundation.

Foundation leadership, in consultation with the community and other partners, has developed a framework for grantmaking, investment and programming that will address serious unmet needs and will benefit, in perpetuity, Louisiana's most marginalized communities.

The Foundation's refinement of its goals and strategies to accommodate the evolving needs of Louisiana's most vulnerable communities has been informed by our longstanding conviction that:

- Increased access to resources and opportunity strengthens vulnerable communities and improves quality of life for all residents.
- Expanding economic opportunity spurs innovation and creates shared prosperity.
- Achieving equity and inclusion for all Louisianans requires effective policy and systemic change.
- The grassroots wisdom of Louisiana residents is one of our most valuable resources.
- Human dignity must be preserved, both in and out of times of disaster.

The Foundation's strategies for strengthening communities and increasing opportunity include:

- Community economic development, defined as a holistic, citizen-driven approach that connects private enterprise to other essential community interests, such as housing, economic inclusion and small business development, and develops partnerships that increase access to quality healthcare and schools, and effective public policy
- Supporting equitable and inclusive public policy at the local, state and federal levels
- Supporting a culture of evaluation and shared learning
- Supporting organizations through both the foundation's financial and human resources
- Continuing to grow the Foundation's role as regional thought-leader in social justice philanthropy

As we move forward from recovery to resilience, Foundation for Louisiana's mission is to invest in people and practices that work to reduce vulnerability and build stronger, more sustainable communities statewide.

The Foundation, through grantmaking, program related investments, convenings, publications and new and enhanced partnerships, shall work throughout the state of Louisiana to realize the following outcomes over the next five years:

- A 15% increase in the number of affordable housing units developed statewide
- A 15% increase in the number of affordable housing units developed in the Louisiana's largest metropolitan areas
- A leverage by at least 5 times of each foundation grant or program related investment in affordable housing
- A leverage by 5 times of each foundation grant or program related investment small business support and developments
- A 20 % increase in the number of small businesses and disadvantaged business enterprises obtaining public contracts in Louisiana's largest metropolitan areas
- An 15% increase in the buying and saving power of Louisiana's population currently earning less than 80% of area median personal earnings

## The Foundation for Louisiana Grant Guidelines

The Foundation for Louisiana is committed to promoting equity and inclusion while empowering communities to build resilience throughout Louisiana. Our board and staff are dedicated to funding and promoting strategies that result in a better, more equitable Louisiana that offers all people –regardless of race, economic status, and gender – the opportunity for full participation in its economy and society.

Our mission is to invest in people and practices that work to reduce vulnerability and build stronger, more sustainable communities statewide.

Foundation for Louisiana provides grants and program related investments to proven and promising organizations that benefit vulnerable communities throughout Louisiana. We evaluate the success of our investments based on the measurable results achieved by our grantees. Effectiveness measures are tailored to the specific goals stated and activities undertaken by grantees and supported the Foundation.

### GRANTMAKING PROGRAM AREAS

The Foundation for Louisiana makes grants for projects and programs that advance our mission to shape a new Louisiana characterized by resilience, shared economic prosperity and communities of opportunity. These investments are made through our grantmaking strategies in two program areas:

**Economic Opportunity**  
**Public Policy**

## Economic Opportunity

Foundation for Louisiana's Economic Opportunity Initiative is based on a holistic approach to strengthening communities that supports the creation of affordable housing, investment in small businesses and local economies, and wealth building opportunities for Louisiana citizens

### Supporting the Creation of Affordable Housing

Foundation for Louisiana's Housing Portfolio provides resources to secure safe, affordable housing for Louisiana residents by investing in local nonprofit organizations that build quality permanent housing. The portfolio supports developers and contractors who make equity a hallmark of their work, mobilize volunteers and are able to provide affordable housing in communities where it is most needed. Housing Portfolio investments are designed to increase the long-term capacity of the nonprofit housing sector such that it is well-positioned to continue the work of building a better Louisiana for years to come.

### Investing in Small Business and Local Economies

Foundation for Louisiana's Small Business Development Portfolio provides resources to assist small businesses – especially those owned by women, minorities and disadvantaged individuals – in both urban and rural Louisiana parishes. The program aims to increase the long-term capacity of nonprofit organizations and intermediaries that help small businesses and micro-entrepreneurs to build equity, secure low-interest loans, and access back office support and technical assistance. Small Business Development Portfolio investments are designed to create quality jobs in low-wealth neighborhoods and facilitate provision of goods and services upon which communities rely for their health and wellbeing.

## Public Policy and Advocacy

The powerful changes that lift up Louisiana's most vulnerable residents can only be sustained over the long-term through systems change and policy that works for the people. Foundation for Louisiana is committed to policy work that ensures that the hard-won gains of our grantees and partners are institutionalized. Through grantmaking and technical assistance, the Foundation supports advocates working to increase access to affordable housing, build community wealth, expand economic opportunity, and empower underserved communities to influence policy at the local, state and federal levels.

## Eligibility

Foundation for Louisiana welcomes requests for funding from organizations that meet the criteria below.

**Valid tax-exempt status** - The Foundation for Louisiana makes grants to organizations that are exempt under Section 501(c)(3) of the Internal Revenue Code and are classified as “not a private foundation” under Section 509(a). Grants may also be made to support independent projects that have a qualified tax-exempt fiscal sponsor.

**Provide service to residents of Louisiana** - Projects must primarily benefit residents, small businesses or institutions of the state of Louisiana

**No overlapping grants** - The Foundation for Louisiana does not award multiple or overlapping grants to the same organization within the same program area. Grantees with outstanding final reports shall be considered in an active grant cycle and will ineligible to apply for a grant until final close-out is completed.

*Note on continuing support: All organizations will be eligible to apply for funding in the first round of grantmaking under the new guidelines.*

**Audit requirement-** Foundation for Louisiana requires that any applicant with an annual budget of over \$750,000 provide audited financial statements. Organizations with annual budgets between \$250,000 and \$750,000 are required to provide financial statements that have been formally reviewed by an auditor. Organizations with budgets below \$250,000 must provide a copy of the most recently filed IRS Form 990. If your project is fiscally sponsored, the fiscal sponsor must meet the audit requirement. The philanthropic field has adopted the term fiscal sponsor to refer to permissible relationships between a potential grantee and non-exempt organization/project.

**Disaster Continuity Plan** - The Foundation shall require grantees to have a Disaster Continuity Plan in place, or under development.

## Grant Restrictions

Exclusions: The Foundation for Louisiana is UNABLE TO FUND:

- Individuals
- Sponsorship of events
- Capital campaigns
- Organizations that discriminate or otherwise restrict participation on the basis of ethnicity, lifestyle, gender, age, or religion
- Soliciting or proselytizing
- General operating expenses
- Reimbursable or duplicative expenses

## Application Process

### Letters of Interest

Letters of interests for grant funding are accepted and reviewed on a biannual basis (see timeline below for specific details). If you believe your charitable organization has a proposed project that fits within the Foundation's program areas and meets the funding criteria stated above, please submit a letter of interest that includes the following:

- Your organization's history and goals, the title of the project you have in mind and the purpose of the project
- A brief statement of the issues to be addressed and your organization's involvement with these issues
- A summary of the activities for which you are requesting support, including an outline of your objectives and anticipated outcomes and impact
- The approximate start date and duration of the activities that the funding will cover
- The total amount of funding needed, the amount requested from the Foundation for Louisiana, and information about other sources of support, both assured and requested

Letters are limited to two pages and must be submitted in 12 point font with standard 1-inch margins. You must also submit the organization's 501 (c) (3) determination. Faxed requests will not be considered.

The Letter of Interest should also include a cover page with the following information:

Date  
Contact Person and Title  
Phone  
Email  
Amount Requested  
Fax  
501(c)(3) Determination letter  
Name of Organization  
Project Budget  
Organization Budget  
Mailing Address

Please submit Letters of Interest to [loi@foundationforlouisiana.org](mailto:loi@foundationforlouisiana.org)

Please submit your questions to [info@foundationforlouisiana.org](mailto:info@foundationforlouisiana.org)

Organizations will be notified if a full proposal will be invited within approximately four (4) weeks of the closing date for receipt of Letters of Interest.

## Application Process

### Full Proposals

Following review of the Letter of Interest, Foundation for Louisiana program staff may invite submission of a full proposal. The purpose of the full proposal is to provide the prospective grantee an opportunity to make a strong, detailed case for support. Program staff may contact the applicant for additional information or schedule site visits as part of the review of a full proposal.

Foundation for Louisiana is committed to treating applicants with courtesy and respect. Staff members are sensitive to varying levels of experience in completing applications and encourage applicants to contact our staff if they are in need of assistance.

### Required Attachments

If your proposal is invited, you will be asked to submit the following supporting documents along with your proposal:

1. Most recent audited financial statement
2. IRS determination letter
3. Most recent IRS 990 form
4. Board resolution
5. Board of directors and key staff list
6. Itemized project budget

Please submit Letters of Interest to [\*\*loi@foundationforlouisiana.org\*\*](mailto:loi@foundationforlouisiana.org)

Please submit your questions to [\*\*info@foundationforlouisiana.org\*\*](mailto:info@foundationforlouisiana.org)

## Proposal Review Process

### Proposal Evaluation Criteria and Award Determination

The Program staff evaluates the Letters of Interest and proposals to ensure that the proposed project or program indeed is a fit with the Foundation’s mission, program goals and objectives

Submissions shall be assessed as competitive if they:

- Are in line with at least one of Foundation for Louisiana’s program areas
- Are collaborative in nature and bring public and private partners together with nonprofit organizations
- Are concrete, practical and impactful
- Include both well-tested models that can be scaled up or expanded regionally or statewide while maintaining local relevance, and new pilots that, if successful, can be grown and replicated

Submissions are not likely to be found competitive if they fail to demonstrate:

- Knowledge of the sector and its trends
- Clarity of project rationale and strategy
- Clarity in identifying target populations to be reached and justification for that focus
- Benchmarks for measuring progress

Final award determinations will be based on the strength of the proposal, as well as diversity in the program areas funded and regional distribution of grant awards. Following review of a full proposal, program staff will make a recommendation to the Foundation for Louisiana’s CEO to fund or to decline to fund the proposal. The Board of Directors approves grants recommendations at it board meeting.

## Funding Cycles

The Foundation for Louisiana’s Board of Directors meets four times a year to consider proposals. Requests received after any deadline will be considered in the next cycle. Although the grants meeting/decision dates may change due to board members’ availability, the typical grant cycle is as follows:

### Letter of Interest and Proposal Timeline

<b>Grant Funding/ Initiative Announcement:</b>	<b>Letter of Interest Submitted by:</b>	<b>Final Proposal Received by:</b>	<b>Staff Review Deadline:</b>	<b>Board Decisions Made by:</b>
July 1, 2011 January 2, 2012	August 15, 2011 February 1, 2012	September 15, 2011 March 15, 2012	October 31, 2011 April 1, 2012	November 10, 2011 May, 2012

## Grant Approval and Conditions

The Foundation for Louisiana program staff will make grant recommendations for consideration by the Board of Directors.

Applicants will be notified of the Board's decision within two weeks of the Board meeting. A Letter of Agreement and Terms and Conditions of the grant will be sent to approved applicants for execution.

Upon receipt of a signed Letter of Agreement, the Foundation will disburse an award check within 30 days. However, due to varying grant conditions and stipulations, grantees are referred to the Letter of Agreement for payment timelines. The grant payment amounts and the number of disbursements are at the discretion of the Program Officer based on grant conditions.

The Foundation shall require grantees to have a Disaster Continuity Plan in place, or under development.

## Denials

A declination letter will be mailed to all applicants whose proposal was not accepted or not approved. A declined proposal will not be reconsidered, but this should not preclude the applicant from submitting other worthwhile requests. Program staff will be available to answer any questions regarding a denied proposal.

## Grant Payments

Grant awards that are less than \$100,000 will be made by check and mailed to the grantee. Grant awards of \$100,000 or more will be made by direct deposit (via electronic wire transfer) into the grantee's bank account.

## Grant Reporting

One of the ways in which Foundation for Louisiana tracks the success of its grantmaking is through grant reporting. Grant reporting is an effective tool that works to:

- Ensure that the Foundation is accountable as a public trust
- Improve the Foundation's grantmaking abilities
- Refine our grantmaking criteria
- Increase the effectiveness of funded projects
- Plan and implement new programs
- Ensure the Foundation's mission is being fulfilled

## Reporting Format

All grantees will receive a standardized document that is required for final and interim reporting.

Grantees will be expected to meet the foundation's requirements for the submission of financial and narrative reports, including an interim progress report, final report, and/or presentation to foundation staff and partners.

## Evaluation, Monitoring and Shared Learning

In an effort to further the Foundation's overall program goals and inform future grantmaking and program activities, grantees will be asked to participate in periodic meetings to share information on project activities and best practices as well as participate in research-based evaluations.

