



## **Organizational Excellence Grants Guidelines and Information**

Organizational Excellence Grants are intended to support training, development, and capacity building opportunities for nonprofit staff and boards. Organizational Excellence Grants can be used to support activities including (but not limited to) strategic planning, board development, communications and fundraising planning, network and IT planning, succession planning, leadership development, organizational assessment, and productivity improvements.

- Suggested Amount: Up to \$10,000
- Requests of \$10,000+ will be considered
- Requests are accepted year round
- Grants are awarded year round while funds are available

### **Who May Apply?**

Organizations classified as 501(c)(3) tax-exempt public charities by the Internal Revenue Service are eligible for grants. Public entities such as schools, municipalities, and libraries may also qualify. Organizations must be located in or provide services for the benefit of Bartholomew County.

The applying organization must be current on all grant reports due to Heritage Fund.

Organizations are eligible to receive an unlimited number of Organizational Excellence Grants per year.

Grants will not be made:

- To individuals

- For events, performances, or trips unless there are special circumstances which will benefit the organization or community
- For individual school needs, unless approved in writing by the school administration
- To faith based organizations unless the project in question is not religious in nature, is not restricted based on faith, and involves no faith based proselytizing.

### **Examples of Organizational Excellence Grants**

Heritage Fund will consider providing Organizational Excellence grants to cover items such as assessments, consulting fees, training, and executive coaching.

Examples of possible Organizational Excellence Grants include:

#### Example 1:

ABC nonprofit is working on a project to create a new fundraising strategy. They identify a training program and would like staff members to attend. This training aligns with their ongoing project work and will allow staff to bring back knowledge and skills that will help them successfully complete their project work and implement their new fundraising strategy.

**Grant Opportunity: Apply for a grant to cover the cost of the training program**

#### Example 2:

XYZ nonprofit wants to work more efficiently and effectively but doesn't know where to start. A new strategic plan? Board training? They identify an online assessment tool they would like to take that will help them identify gaps and opportunities.

**Grant Opportunity: Apply for a grant to cover the cost of the assessment.**

**Grant Opportunity: Apply for an additional grant to support work that will help address needs identified in the assessment**

### **Who Reviews and Makes Decisions on Organizational Excellence Grants?**

Organizational Excellence Grant requests are first reviewed by the Grants Manager. If the Grants Manager has questions or needs further clarification on the request, you may be contacted for additional information. Following the initial review, all requests \$3,000 or less will be forwarded to the Heritage Fund President and CEO and Chairperson of the Heritage Fund Grants Committee for final review and consideration. Grant requests for greater than \$3,000 will be reviewed by the Grants Manager and members of the Grants Committee.

## **To Apply**

Organizations applying for funding must submit a complete application and all requested documentation to be considered for an Organizational Excellence Grant. See the attached application for details.

Applications can be submitted via mail, email or in person to:

Abbie Bush, Grants Manager  
Email: [abush@heritagefundbc.org](mailto:abush@heritagefundbc.org)

Mail: Heritage Fund  
538 Franklin Street  
Columbus, IN 47201