



ORGANIZATIONAL EXCELLENCE GRANT PROGRAM

Request for Proposal

Goal: To support nonprofits serving Bartholomew County in their efforts to grow organizational capacity and achieve programmatic and operational excellence

In 2017, Heritage Fund launched the Organizational Excellence grant program to take a more active role in strengthening local nonprofits. The Organizational Excellence grant program was developed to make it easier for nonprofits to receive grants to improve effectiveness, make good operations better, and support the functions that are necessary to create and maintain strong programs. Organizational Excellence grants are not a one-time effort to improve an organization in the short-term but a continuous improvement strategy toward the creation of a sustainable and effective organization. It is our belief that stronger organizations operate better programs that have the biggest impact on our community.

Assuming unlimited resources, what would take your organization to the next level?

Heritage Fund has allocated up to \$100,000 to support an Organizational Excellence Request for Proposal (RFP) to help organizations act on the answer to the question above. An organization may seek funding to support activities including (but not limited to):

- Strategic planning
- Board and/or leadership development
- Communications strategy
- Fundraising planning
- Network and IT systems improvement
- Succession planning
- Productivity improvements

Organizations are encouraged, but not required, to use consultants as needed to support their work. Organizations are responsible for identifying and securing their own consultants.

The chosen area of focus for Organizational Excellence grants requested through this RFP must be justified by an organizational assessment*, a current strategic plan or a directive from the organization's Board of Directors indicating that the area of focus is part of a prioritized, ongoing organizational improvement initiative.

*Please visit the Heritage Fund website (www.heritagefundbc.org) for links to free organizational assessment tools. Organizations are welcome to use these or other tools to prepare for this RFP.

EXAMPLES OF ORGANIZATIONAL EXCELLENCE GRANTS

1. ABC organization has been working on a Six Sigma project to create an updated communications strategy. A training course has been identified that will help staff implement the improvements identified during the project. ABC organization applies for a grant to cover the cost of the training including travel and accommodations.
 - a. Expected Outcome: Communications strategy is effectively implemented using learnings from the training. The updated strategy improves visibility of the organization in the community and leads to organizational benefits such as increased donations, more referrals, etc.

2. EFG organization is a United Way certified agency. Upon completing the United Way Certification matrix, the organization identified the need to update their fundraising strategy. EFG organization applies for a grant to hire a fundraising consultant to work with the staff and board to redesign their fundraising strategy and diversify their funding sources.
 - a. Expected Outcome: Fundraising consultant develops a sustainable strategy that is approved by the board and put into use resulting in an increase in donations and more diversity in funding sources.

3. LMN organization has identified a similar agency in Ohio that is operating at higher capacity than LMN. To conduct benchmarking with the Ohio organization, LMN wants to schedule regular staff site visits over the course of six months. LMN organization applies for a grant to cover the cost of staff travel to and from Ohio.
 - a. Expected Outcome: Regular site visits with the Ohio organization result in the redesign of operations and program implementation as appropriate. Program outcomes in Bartholomew County improve.

4. XYZ organization would like to evaluate their current programming by conducting a survey of clients and the community. The outcomes from the survey will be used to identify service gaps and opportunities for improvement. XYZ organization applies for a grant to hire a graduate student to facilitate the survey and analyze the results.
 - a. Expected Outcome: Survey analysis results in the discontinuation of duplicate or unnecessary programs and the introduction of programs to meet the current needs of the community. Survey data is shared with partner organizations to improve collaboration.

OUTCOMES

Organizational Excellence grants will be evaluated based on the following criteria:

- Organization's commitment to continuous improvement
- Anticipated impact on the organization and community
- Alignment with gaps identified in the organizational assessment
- Thoroughness of the request

GRANT GUIDELINES

- Eligibility: Not-for-profit organizations located in or providing services for the benefit of Bartholomew County
- Suggested grant request amount of up to \$10,000 though larger grants and multi-year requests will be considered
- Grant proposals must be non-political in nature
- Grant proposals from faith-based organizations cannot include proselytizing
- The deadline for grant requests is **5pm on Monday, April 2, 2018**
- An organization may submit an Organizational Excellence Grant proposal even if it has or will apply for separate grant funding from Heritage Fund

Special consideration will be given to requests that:

- Are part of longer term capacity building initiatives
- Include contribution of funds to support the grant project from the organization and/or board

Grant Review

The size and number of grants awarded will be dependent upon the quality of proposals received. After reviewing the submitted proposals, Heritage Fund reserves the right to decline funding any or even all of the proposals.

Reporting Requirements

All grantees will be required to submit a final report that describes the outcomes of the grant award and how the funding benefited their organization and/or the community.

Questions regarding the Organizational Excellence Grants Program?

Contact: Abbie Bush, Grants Manager

812.376.7772 or abush@heritagefundbc.org

It is the general policy of Heritage Fund – the Community Foundation of Bartholomew County to include people without regard to age, disability, economic circumstances, ethnicity, gender, race, religion, or sexual orientation in carrying out our mission.