



**2008
GENERAL CYCLE GRANT APPLICATION
GUIDELINES AND PROCEDURES**

Applications Due: Monday, November 5, 2007

*Equity Foundation builds communities that advance the dignity and worth of all people.
Equity Foundation promotes philanthropy and positive interaction by granting funds to
organizations that work to eradicate prejudice against gender and sexual minorities and
people from other diverse communities.*



2008 GENERAL CYCLE GRANT APPLICATION GUIDELINES AND PROCEDURES

Submission deadline: Monday, November 5, 2007

Completed applications may either be received at the Equity office or postmarked by 5:00 p.m., November 5, 2007. The grant applications may be hand delivered or sent by courier to Equity Foundation's office at Convention Plaza, 123 NE 3rd Avenue, Suite 405, Portland, Oregon 97232 during the hours of 9:00 a.m. to 5:00 p.m. You may mail your application to Equity Foundation at P.O. Box 5696, Portland, Oregon 97228-5696. Please provide the original of the proposal, unstapled, with two copies.

If you have any questions or would like technical assistance, feel free to contact the Equity Foundation office at (503) 231-5759 or info@equityfoundation.org.

In 1989, members of Oregon's LGBTQQ community who were concerned about the ignorance, fear and divisiveness in society, created Equity Foundation and began to change our world. Since its inception, Equity Foundation has distributed more than \$2.5 million in grants throughout Oregon and Southwest Washington to programs that work to build communities that embrace the dignity and worth of all people. During the 2007 General Grant Cycle, Equity Foundation awarded 44 grants ranging in size from \$50 to \$3,250 with an average gift of \$1,500. Grants above \$2,000 are very rare.

GENERAL ELIGIBILITY REQUIREMENTS

- Eligible organizations must either have a 501(c)(3) non-profit tax status or be an accredited non-profit educational institution. Start-up organizations may also be eligible if they are affiliated with an organization that has a 501(c)(3) tax status that will assume responsibility for administering all funds received and expended.
- The Foundation will not approve grants to individuals or for the following purposes: endowment funds; capital campaigns; physical plants; annual fund drives; political organizations or campaigns.
- To be eligible for funding, projects or programs must be directly relevant to Equity Foundation's mission of building communities that embrace the dignity and worth of all people.
- Organizations or projects must operate within Oregon and/or benefit Oregonians. Organizations from Southwest Washington serving residents of the Portland metropolitan area are eligible to apply.

TYPES OF PROJECTS FUNDED

- Equity Foundation makes grants to organizations that advance positive interaction and understanding of people who are lesbian, gay, bisexual, intersex, transgender, queer, and questioning (LGBTQQ) into the broader community and/or that promote healthy human interactions. Through its grantmaking, Equity Foundation seeks to:

- support small/start-up or emerging organizations that are often isolated from traditional funding sources.
- support organizations that serve the LGBTQQ community as well as those that represent diversity inclusive of people who are LGBTQQ and other diverse communities.
- reach underserved groups.
- fund statewide.
- raise visibility in the larger community and the LGBTQQ community.
- promote leadership and help frame the debate over issues impacting diverse communities.
- fund projects with measurable outcomes, which may include projects that build organizational capacity or fund operations.

GRANTING PRIORITIES/CATEGORIES:

Equity Foundation has revised and expanded its granting categories for the 2007 grant cycle. Grants will be awarded in the following categories:

- **Civil Rights:** awarded to groups working to advance the civil rights of gender and sexual minorities and other marginalized groups whose members include people who are lesbian, gay, bisexual, intersex, transgender, queer or questioning. Projects designed to address inequality and injustices, education and advocacy, leadership development, and capacity building initiatives are also included in this category.
- **Human Rights:** Equity Foundation's mission is to build communities that advance the dignity and worth of all human beings. The Human Rights category includes:
 - **Cultural Rights:** We believe the full diversity of the human race enriches and strengthens our communities, and support projects that include and/or focus on sexual and gender minorities. Equity Foundation seeks to provide funding to projects that work at the intersection of issues, such as racial equity community workshops focused on internalized homophobia, films and documentaries with a focus on sexual and gender minority communities, or theatre works that include portrayal of individuals who are sexual or gender minorities.
 - **Social Rights:** All individuals have the need for food, shelter and health care. Equity Foundation funds projects that help people live independently and with respect and dignity. As part of Equity Foundation's commitment to equity, we encourage applications from projects working at the intersection of issues, such as projects focused on health access for people who are transgender, inclusive housing projects and other programs targeted to improving the quality of life. Grants from the Paul D. Higgins Housing Fund are included in this category.
 - **Economic Rights:** Individuals have the right to education and to be able to earn a living. Grantees working to prevent bullying and harassment in the schools so that all students have a safe environment in which to learn, are included in this category. As part of our commitment to equity, Equity Foundation seeks to increase funding to projects focused on the intersection of issues, such as projects that address racial and gender equity in education and employment. Grants from the Paul D. Higgins Housing Fund are included in this category.

Other grants and special projects:

Housing for People with HIV or AIDS – The Paul D. Higgins Housing Fund was created through the estate of Paul D. Higgins, in 2004. Equity Foundation will periodically award grants through this Fund, to support housing for people with HIV or AIDS and for supportive services designed to help people with HIV or AIDS maintain their housing and live as independently as possible. This year, \$15,000 is set-aside for this purpose. The procedures and timelines outlined above for general cycle grants must be followed by applicants for funding through the Paul D. Higgins Housing Fund.

PRIDE Grants – Equity Foundation provides support for Pride events throughout Oregon and Southwest Washington each year. The Request for Proposals for Pride grants will be made available in February 2007 with a mid-March application deadline. Between \$5,000 - \$10,000 per year has been allocated over the past four years, with grants averaging \$400.

Portland 100 Fund – The Portland 100 Fund, now in its second year, is a group Donor Advised Fund. Information about the Portland 100 Fund is available at equityfoundation.org.

LGBT Juvenile Justice Fund – The LGBT Juvenile Justice Fund is a Donor Advised Fund targeted to support work with youth who are lesbian, gay, bisexual, or transgender who have come in contact with the juvenile justice system. Interested organizations should contact West Duncan at Equity Foundation for more information on the LGBT Juvenile Justice Initiative.

Scholarship Funds – For information on Equity Foundation's nine scholarship funds visit Equity Foundation's web site.

Descriptions of funded projects in 2007 are available on Equity Foundation's website at www.equityfoundation.org.

APPROVAL PROCESS

Equity Foundation's Grants Committee reviews all proposals; requests additional information when required, and if time permits, conducts pre-award site visits as deemed necessary. Recommendations are made to the Board of Directors, which meets in December 2007 to review and make all decisions on funding. Grant decisions will be announced in late January 2008 and grants will be awarded in late February/early March 2008. **Grant recipients are encouraged to attend Equity Foundation's annual *Investments in Dignity Awards* community event, to be held on March 13, 2008 at the Gerding Theatre.**

GRANT APPLICATION INSTRUCTIONS

1. Please type, or print neatly in dark ink. Illegible and/or incomplete applications will not be considered. Use a font that is no smaller than 10 point and margins that are larger than .5".
2. Please send the original plus two copies, unstapled (total of 3) of the Grant Application Coversheet and the Grant Proposal. *A separate cover letter may be submitted but is not required.* Submit three copies of all requested attachments.
3. If you received funding from a general cycle grant in 2007, please provide a progress report that outlines how Equity funds were, or are being, used.
4. If you are affiliated with an agency that will act as a fiscal agent, please include a letter from that agency on its letterhead and signed by an authorized representative of the agency, which defines your relationship with that agency.

4. You must sign the Certification of Accuracy and Non-Discrimination. If you have a fiscal agent, an authorized representative of the fiscal agent must also sign the Certification of Accuracy and Non-Discrimination.

6. ***Completed applications may either be received at the Equity Foundation office or postmarked by 5:00 p.m., Monday, November 5, 2007.*** Grant applications may be hand delivered or sent by courier to the Equity office at Convention Center Plaza, 123 NE 3rd Avenue, Suite 405, Portland, Oregon 97232 during the hours of 9:00 a.m. to 5:00 p.m. Applications may also be mailed to Equity Foundation at PO Box 5696, Portland, Oregon 97228-5696.

For more information or for technical assistance, contact the Equity Foundation office at (503) 231-5759 or info@equityfoundation.org.

EQUITY FOUNDATION 2008 GENERAL CYCLE GRANT APPLICATION COVER SHEET

(Submit the unstapled original plus two copies)

Applicant Organization Information

Name of Organization

Mailing Address

City/State/Zip Code

Contact Person

Telephone Best time to call

Fax Number

E-mail

Website

Fiscal Agent Information (if applicable)

Name of Organization

Mailing Address

City/State/Zip Code

Contact Person

Telephone Best time to call

Fax Number

E-mail

Website

IRS Tax Exempt Number (of applicant or fiscal agent) _____

Project or Program Title _____

Amount Requested _____ Project Duration (in months) _____

Total Project Expenses (if applicable) _____

Total Annual Organizational Expenses _____

This project fits best in the following Equity Foundation granting category (Choose one):

_____ **Higgins Housing Fund for PWHIV/PWAIDS**

_____ **Civil Rights**

_____ **Cultural Rights**

_____ **Social Rights**

_____ **Economic Rights**

Is your organization registered with the Attorney General of Oregon (Justice Department) as a charitable corporation and/or with the Oregon Secretary of State as a non-profit organization? Yes No

If not, please state exemption: _____

INCOME SOURCES (as percent of total)

Fiscal year _____ to _____

Corporate/Foundation Grants _____%	Individual Contributions _____%
Fees/Earned Income _____%	Membership _____%
Government:	Special Events _____%
Federal _____%	United Way _____%
State _____%	Workplace Campaigns (non-UW) _____%
County _____%	Other _____%
City _____%	100%

BOARD DIVERSITY

Total Board Members _____

Race: Provide categories and percentages as reported and tracked by your agency; e.g.:

African American _____%	Asian American/Pacific Islander _____%
Hispanic/Latino/a _____%	White _____%
Native American _____%	Multiracial/Biracial _____%
Arab/Iranian _____%	Other _____%

Gender Composition: Provide categories and percentages as reported and tracked by your agency:

Sexual Orientation: Provide categories and percentages as reported and tracked by your agency:

STAFF DIVERSITY

Total Staff _____

Race: Provide percentages as reported and tracked by your agency; e.g.:

African American _____%	Asian American/Pacific Islander _____%
Hispanic/Latino/a _____%	White _____%
Native American _____%	Multiracial/Biracial _____%
Arab/Iranian _____%	Other _____%

Gender Composition: Provide categories and percentages as reported and tracked by your agency:

Sexual Orientation: Provide categories and percentages as reported and tracked by your agency:

Proposal Summary. Describe the project/program for which you seek funding. Specifically describe how Equity Foundation's funding will be used. Limit yourself to not more than one page.

CERTIFICATION OF ACCURACY AND NON-DISCRIMINATION

I hereby certify that the information included in this application is true and correct. I further certify that this organization and/or fiscal agent does not discriminate on the basis of race, creed, national origin, religion, marital status, age, mental or physical disability, gender, gender identity, sex, sexual orientation or source of income in its employment practices, selecting Board members, selecting students or in accepting clients for its services or products.

Applicant Organization _____

Signature of Authorized Officer _____ Date _____

Name and Title _____

Fiscal Agent Organization (if applicable) _____

Signature of Fiscal Agent (if applicable) _____ Date _____

Name and Title _____

EQUITY FOUNDATION

2008 GENERAL CYCLE GRANT PROPOSAL

(Submit unstapled original and two copies)

Please answer the following two questions, limiting yourself to no more than four (4) total pages. This does not include the two-page Grant Application Cover Sheet or the attachments.

1. Applicant Organization Background

Please include organizational mission statement and purpose; organizational qualifications; brief history of accomplishments; governance; area and population served. If this is a collaborative project, describe the lead agency and its relation to others involved.

2. Proposal Details

- a. Describe the project or program for which funds are being sought.
- b. Identify the needs and how the proposal addresses identified needs.
- c. State projected goals, objectives, timeline, and anticipated impact.
- d. Describe who will be doing the work and their qualifications (staff and/or volunteers).
- e. Describe the people who will benefit from the proposal (numbers, age, etc.).
- f. Describe what geographic area will be served by the project.
- g. List two ways your organization can measure the effectiveness of the program or project.
- h. Explain how the project or program furthers Equity Foundation's mission.
- i. Describe anything else about your organization or project you think is relevant to this proposal.
- j. Describe what you will do if your project is funded at a lower level than your request.

Grant recipients agree to provide financial accounting for funded projects/programs and are required to submit a written report at the completion of their project/program. For a downloadable report form, please visit www.equityfoundation.org

ATTACHMENTS CHECKLIST

Please include three (3) unstapled copies of each of the following:

1. IRS Letter of Determination of tax exemption under Section 501(c)(3) of the Internal Revenue Code.
2. List of current Board members with affiliations.
3. List of key organizational staff, including titles.
4. Non-Discrimination Policy. If you are affiliated with an agency that will act as a fiscal agent, please include a copy of their Non-Discrimination Policy.
5. Most recent IRS Form 990 (if applicable). If your organization did not complete a 990, provide year-end financial statement.
6. List of corporate and foundation grants received in the past two years. Please include amounts received.
7. Current year operating budget.
8. Detailed budget for the project for which funds are being sought (if applicable).
9. If the project for which you are seeking funds is a collaborative project with other agencies, include letters or other documentation from the collaborating agencies.
10. If you received an Equity Foundation general cycle grant award from the 2006-07 general granting cycle include a year-to-date plan v. actual status report.

For technical assistance, contact the Equity Foundation office at (503) 231-5759 or info@equityfoundation.org.