2021 Spring Grant

Otto Schoitz Foundation

Overview

To be considered for funding in this cycle, your complete application is due no later than **February 19, 2021**. Awards are expected to be announced by the end of **May**. Please note, the Foundation awards *reimbursable* grants, i.e. the Foundation reimburses (as often as necessary) for costs incurred up to the total amount specified in the grant.

New Feature: **Collaborator**

The Collaborator feature allows applicants to work together on a single request. Once you have started a request you will see the Collaborate button at the top of the page. This can be used to invite other people to work on this request.

- From the Collaborate pop up, enter the email address of the person you would like to invite,

- Set the Permission you would like the collaborator to have, either View, Edit, or Submit.

- And lastly, include a message and select Invite.

For a quick video tutorial, click here.

Please note: Several questions have been pre-populated with your original LOI response. Please provide any update, if necessary.

Project Title*
Character Limit: 100

Guiding Principles*
Please indicate if you have read and understand the Otto Schoitz Foundation's Guiding Principles and Approach. The Guiding Principles and Approach will give you deeper insight into the type of projects the Foundation is interested in funding. Preference is towards:

- projects changing individuals and communities

- meeting the needs of the vulnerable

- addressing root or primary causes

- ideas with evidence of success and impact

- impacting Waterloo, because of the greater needs

- demonstrating a shared funding approach

Choices
Yes

No

Organizational Information

Q1 - Organizational Purpose*

Describe the purpose of your organization.

Character Limit: 1500

Q2 - Organizational Structure

Please identify your organizational structure.

Choices

501c3 as designated by the IRS
Governmental entity, such as municipality (or department thereof) or school district

Q2a - Governmental Unit Support

If your organization is a governmental unit (such as municipality or school district) **OR** the proposed project involves a governmental entity, please provide evidence of approval & support by the appropriate administrative body. For example, if a municipality, a copy of the city council resolution approving the project is appropriate. If a school district, a letter from the district's superintendent indicating support of the project as a high priority initiative within the district should be submitted.

File Size Limit: 2 MB

Q2b - Board Roster*

Please provide a board roster, including:

- board member's name, contact information, professional affiliation and other information describing the member's affinity to your organization.

- demographics of your board as a whole - race/gender %'s at a minimum (ethnicity and other pertinent demographics are optional)

File Size Limit: 2 MB

Q2c - Financial Statements Board Oversight*

Please provide the organization's most recent audited or reviewed financial statements (including the independent reviewer's opinion). If your organization does not have an independent audit or review, please provide the financial statements representing your most recent 12 month period, including **BOTH** an income statement and balance sheet.

In the text below,
1) Please explain the board oversight concerning the organization's financial status. At a minimum explain what the board receives (in terms of information/financial statements) and how often the board receives this information to carry out their fiduciary financial responsibilities.

2) Summarize your organization's revenue by percentage received from a) taxbase/government sources, b) fee-based/membership sources, c) funds raised from individual, corporate and/or foundation grants.

For supporting organizations, please provide all responsive information for both supporting and supported organizations, i.e. your entire organization.

Character Limit: 1000 | File Size Limit: 10 MB

Assurance of No Competition **- Background**

The Otto Schoitz Foundation was established in 2016 with an investment resulting from the transfer of hospitals/health facilities from Wheaton Franciscan Sisters to MercyOne (formerly known as Mercy Health Network). As part of the transfer, MercyOne committed to continue operating the existing hospitals/health facilities in substantially the same manner as before the transfer. Correspondingly, the Foundation's predecessors agreed to avoid using the investment in a manner that competed with MercyOne. As a result, the Foundation is particularly attentive to, and cautious of, grant applications that are affiliated with organizations that may compete with MercyOne, **including (but not limited to) all UnityPoint entities & affiliates.** The Foundation is not opposed to the mission or people of these organizations in any way; rather, the Foundation is focused on remaining faithful to the legal requirements & the spirit of the transfer agreement.

Q3 - Competitive Organization*

This restriction on competition applies to the grant funds absolutely. The restriction on competition applies to fiscal agents and fiscal sponsors and their associates even if, for example, the fiscal agent or sponsor does not necessarily directly compete against MercyOne or its affiliates. Grants will not be awarded for projects determined by the Otto Schoitz Foundation, in its sole discretion, to compete, or to appear to compete, with MercyOne or its affiliates.

Are you an organization or affiliated with an organization that competes with MercyOne or its affiliates OR does the proposed project invoke competition with these entities in any way? If so, answer Yes and do not complete this application.

Choices

Yes

No

Project Information

Q4 - Community Need Being Addressed*

Please describe the community need/issue being addressed by the proposed Project, including any supporting data you may have.

Character Limit: 1500

Q5 - Project Description*

Thoroughly describe the Project.

Character Limit: 2000

Q6 - Summarize Project Description*

Provide a concise summary of Project Description response.

Character Limit: 250

Q6a - Focus Area*

Please indicate the Project's focus area:

Choices

Community Betterment
Education & Development
Environmental Improvement
Health
Human Services
Recreation & Physical Fitness

Q6b - Reference URL

If you choose to reference a website location in your application, please indicate the URL address here so that our grant evaluators can easily access.

Character Limit: 2000

Q6c - Project Start and End Dates. The Foundation funds proposals which commence AFTER the respective award announcement. Fall awards are announced the end of November; Spring awards are announced the end of May. We reimburse grantees for expenses incurred <u>AFTER the award date</u> and prefer to disburse all grant awards within 12 months. Grantees may submit reimbursement requests up to the amount of the award as often as necessary.
<u>If awarded</u>, you will be asked for a progress update 90 days after the Project Start Date and a final report 30 days after the Project End Date.
Please take this into consideration as you identify the project start and end date.

Project Start Date*
Character Limit: 10

Project End Date*
Character Limit: 10

Q7 - Type of Request*

To assist in making the choice for type of request, we use the following as general definitions for each category

- *Capacity building* – funds for initiatives that improve the grant-seeker's effectiveness, in terms of organizational and financial stability, program quality, and growth – such as

professional development for the grant-seeker's staff/board members or opportunities for peer learning, networking or leadership development.

- *Capital* – funds to acquire assets such as land, building and/or equipment; renovations and/or construction projects.

- *Operating* – funds to support the organization's overall activities and mission, including administrative expenses and overhead.

- *Programmatic* – funds for specific project or activity tied to project-based outcomes; typically involves services that directly touch the grant-seeker's clients.

Choices
Capacity Building
Capital
Operating Support
Programmatic Support

Q8 - Project goals and/or expected outcomes*
Please describe the Project's top goals and/or expected outcomes. What results do you expect to achieve?
Include a description of how the goals and/or outcomes will be measured on a go-forward basis.
And, if this Project is pre-existing, explain how you have historically performed against expected goals/outcomes.

Character Limit: 2000

Q9 - Targeted population*
Describe the targeted population this Project is intended to impact.

Character Limit: 750

Q9a - Targeted Population - Community*
Please identify the primary community *expected to be served* by the grant. The Waterloo community is defined by the applicable zip codes.

Choices
Waterloo community (>90%)
Predominantly Waterloo community (>50%); some other communities
Some Waterloo community (<50%); predominantly other communities
Other communities (>90%)

Q9b - Youth*
Indicate number of youth expected to be served.

Character Limit: 10

Q9c - Adults*
Indicate number of adults expected to be served.

Character Limit: 10

Q9d - Seniors*

Indicate number of seniors expected to be served.

Character Limit: 10

Project Budget

Q10 - Project Budget*

Please indicate the proposed project budget.

Character Limit: 20

Q10a - Project Budget Upload*

Please upload a detailed listing of the Project Budget, including both **revenue sources and cost categories**. For revenue sources, please detail all shared funding indicating if the funding is secured or pending.
Clearly identify how funds requested from Otto Schoitz Foundation would be utilized.
If it's helpful, a template is found here.

File Size Limit: 4 MB

Q10b - Shared Funding of Organization's Mission*

In the Project Budget Upload (Q10a) you have already identified shared funding for this specific proposal. If the Project represents only a portion of your organization's mission, please elaborate on other sources of funds secured in the recent past to highlight shared funding support of your overall mission/organization.

Character Limit: 750

Q11 - OSF Requested funds*

Please indicate the total dollar amount you are requesting from the Otto Schoitz Foundation.

Character Limit: 20

Q11a - Partial Funding*

If the Otto Schoitz Foundation were to award less than your full request, please describe how the Project would and/or would not proceed.

Character Limit: 500

Electronic Signature

Please note: by entering your information and selecting "I agree", you are:

1. Certifying, to the best of your knowledge, all information included in this Application is complete and accurate;

2. Representing that you are an officer or other agent of the applicant authorized to enter into legally binding agreements on behalf of the applicant;

3. Accepting responsibility for the project, including completion of required reports, if a grant is awarded;

4. And agreeing that your insertion of information in the following fields constitutes an electronic signature.

Confirmation*
Choices
I agree

Name and Title of Individual Submitting Application*
Character Limit: 100

Once complete, you must submit the Application; you will receive an automated email stating the Application has been successfully submitted.

IMPORTANT: The Otto Schoitz Foundation utilizes the online grants management system to generate email communication from the email address administrator@grantinterface.com. As this communication is important to your application, please ensure this address is not blocked or filtered by your email service. Further, do not send correspondence to this email address; it is not established to receive incoming messages.