

EMILY NGUYEN:

Hello and welcome to the 2024 Weitz Family Foundation Grant Application Overview. I'm Emily Nguyen, Deputy Director.

ROBIA QASIMYAR:

And I am Robia Qasimyar, Program Associate.

EMILY NGUYEN:

Thank you all so much for joining us today. Today we are going to spend some time talking through the grant application. On our agenda today, first up is talking about the Virtual Information Session and Office Hours, talking about the timeline. We'll also share an overview of the types of grants and general guidelines and then actually spend time walking through the Beloved Community Application and the Capacity Building Application. And then, finally, we'll review those key important dates to remember as you're preparing your application.

ROBIA QASIMYAR:

Absolutely. Thanks, Emily. So, yes, taking a look at our timeline for this year, we, of course, start off with grant applications opening on Monday, July 17th, and closing on Monday, August 28th at 5pm Central Standard Time. While our previous forms were hosted on Wufoo, we are very excited to be utilizing a new system which is GivingData for application submission, review, and management. Now, if you're not familiar with GivingData, we strongly encourage you to refer to our FAQs and the video that Danny so kindly made that is featured on the tutorials page of our website. So after apps are due, our team will take a few months to review, assess and make final recommendations at our board meeting in late November before all applicants are notified of final decisions by Friday, December 15th. In similar to years past, we will be hosting Virtual Application Sessions and Office Hours via Zoom throughout the duration of our open application period. So, the application sessions are basically the same presentation where we go through each application question only live with Q&A at the end.

But if you have quick specific questions that you'd like to ask more on a one-on-one basis, we recommend attending one of our office hours as we admit folks in from the waiting room one at a time. Now, you must register for Virtual Application Sessions in advance by emailing danielle@weitzfamilyfoundation.org. But if you want to hop on a virtual office hour, you can simply click the links featured on the important dates page on our website. OK, so we have two different types of applications, Beloved Community and Capacity Building. I'd say many of the questions on these applications remain the same as in previous years, and even the new ones are really old questions simply asked in a more specific way. And we'll discuss these a little bit more in detail here shortly, especially the multiyear option of Capacity Building, which is very exciting that Emily will share more about. You'll notice that these applications will have a lot in common. One is just a bit more comprehensive than the other.

The important thing that we want to emphasize, though, is that you are only eligible to apply for one kind of grant. So either Beloved Community or Capacity Building, not both. Now, also of note, all of our grants are distributed as unrestricted general operating dollars. So before we go on to further details of our applications, please keep in mind that you should focus your submissions on racial equity and accessibility. The due date is Monday, August 28th at 5pm Central Time. You'll be notified by Friday, December 15th about the status of your application. And if you'd like an alternative application to accommodate any accessibility needs, you simply need to email emily@weitzfamilyfoundation.org. No

problem. And of course, the word counts that you'll see are suggestions and not requirements. So please don't feel boxed in by those. So let's dive into Beloved Community. Alrighty, so Beloved Community Grants are for Omaha-based organizations that complement our mission of prioritizing and supporting systemic change that transforms our community into an equitable place to live.

Now, it's a great way for organizations who are new or at least new to us to be introduced to our foundation. So if you have never formally received a grant by the Weitz Family Foundation before, this is the only grant you are eligible to apply for. And that being said, there are many organizations we have funded for quite some time that continue to apply for and stay in Beloved Community with requests up to \$20,000. So, returning grantees, please don't let that deter you. And when are applications due? Why Monday, August 28th at 5pm CST, of course? So we start off with some basic information, your organizational name, noting your tax ID, mailing address, and contact information followed by your mission and a brief description and history of your organization. And next, up here, we're interested in knowing how your organization addresses racial justice in the greater community, which could be but isn't limited to things like policy, research practices or resource distribution. And we seek to understand what organizations understanding is of one another and how people are collaborating.

So we ask that you list what other organizations have a similar mission to you, particularly those led by people of color, and then describe how you're working with them for mutual success. And for this next question, we want to understand the connection between your organization and our mission, which again is to prioritize and in support systemic change that transforms our community into an equitable place to live. So how would a grant from us fulfill that mission? Then you would enter the amount that you're requesting from our foundation up to \$20,000 before you enter your projected annual budget for 2024. After that, you'll upload your 2023 budget. Currently, you're welcome to share your working budget in whatever format you're using, by the way. Just be sure that it explicitly includes revenue and expenses. And so these next set of questions center on what we as a foundation really value, which is equity. Over the last year, we have been working with Mynasha Spencer at All of Us, Together Company to deepen our understanding and practice of what it means to be engaged in equity and relate that to specific performance standards.

And this is something we've spoken with current grantees about during site visits in the spring and that Emily discussed on the Equity Journey blog post back in April on our website featuring the three matrices Mynasha created. So if you have checked that out, this should be pretty familiar to you. But please keep in mind that we are seeking progress and not perfection here. We don't expect organizations to be at a certain threshold across the board. Instead, we really want to see how you're making active progress and what steps you're taking from where you are presently. So, therefore, it's really imperative that you would describe yourself as honestly and your ratings and how you are or would like to grow in the following four areas. So, board membership is the first category. Where does your organization fall? How many members of your board are of the global majority? So select and reflect. What measures are being taken to either make progress here or maintain your current membership?

Next, we have senior leadership, which could include directors, program managers, operations managers, really anyone who helps guide the organization in oversight role. So you will select and reflect. Then comes professional development. So we want to know where you are at with cultural competency in DEIA education specifically. So select and reflect once more. We would like you to offer a brief blurb about the trainings your team has engaged in here too. And finally, we have policies and

procedures. So have they been reviewed for bias, offensive, and or exclusive language? Select and reflect again. Describe how your policies have been reviewed, who is doing them, and what steps you're taking to review more of your policies, or how you're ensuring to continue to monitor ones that have been reviewed. Now, we realize that organizations can and have built equity and accessibility in areas beyond the four that we just mentioned. So here, we offer applicants the opportunity to highlight work they're excited about when it comes to recruiting, interviewing, talent management, performance, employee satisfaction, compensation transparency, and supplier diversity.

We ask that you stick to describing no more than three of these areas. And if you're not taking action necessarily in any of these, we'd like you to speak to how you might in the future. And as a second part to that question, we want to hear which of those equity work areas have been the most challenging for you. And we really ask this because we want to understand what obstacles people are experiencing so we can support and address those barriers to progress. Now, wrapping up Beloved Community are some optional questions that we're curious about but will not impact grant review. I really want to emphasize that. So, firstly, your advocacy interests. Do you currently engage in advocacy work or have you been curious about it? We are thinking about ways that our foundation can help amplify organizations' advocacy efforts. So if you answer a yes or that you're curious, we may follow up with you in the next few months about the best ways to do so. But if the answer is no, that's absolutely OK.

Again, answers to this question will not impact the outcome of your application review. And secondly, we want to know how you heard about us. So please share that here. And also mention if anyone in the Weitz Family has had any board or service history at your organization. Additionally, what are your biggest needs outside of funding? So this could be anything, from contractors, technology, transportation, CRMs, office equipment, things like that. We're interested in getting an understanding of what organizations' needs are. So again, we can potentially identify trends in ways to connect people to one another. And then any final tidbits that you'd like to share with us that hasn't previously been addressed in the application, you'd be welcome to do so here. And yeah, few already. Thanks for coming along for the ride as we reviewed Beloved Community application questions. I'll pass it over to Emily now who will share all about Capacity Building.

EMILY NGUYEN:

Awesome. Thank you so much, Robia. So we are going to jump into the Capacity Building grant. As you see some of these questions, many of them will look quite familiar because they were previously discussed by Robia. But as Robia said earlier, Capacity Building, we have a few additional options that I'll talk about here in a moment. But first off, Capacity Building grants are really for larger operational grants and really about helping support organizations achieve their mission. So just like with Beloved Community, these grants are general operating. So it's really about how we help support and build your organization's capacity. So, organizations should apply if they're based in Omaha and they've had a previous relationship with the foundation, really, meaning that you've received funding from the foundation before. If you haven't, you will need to start off with the Beloved Community grant. And again, these grants start at \$21,000, and they are due on August 28th at 5pm Central Time.

So to start off this grant, first, of course, is your general information with your tax ID. If you have a fiscal agent, you want to note their name and their tax ID, a mailing address, contact person. And then if your grant writer was used, their name and contact information as well. And then we do ask that you include a list of your board of directors as an attachment as part of the grant application. Then we did this new

last year, and we're going to do this again this year, is we're asking that you upload an organizational chart with a brief description of each team's role. This doesn't have to be every single person in your organization, but rather to really show us how you have your different departments or teams separated and the work that each of them does. That really helps us get a better understanding of how your organization is structured. If you don't have a template that you use or a document that has already been created, please feel free to reach out to any of us on the team and we can get a template to you.

And then, finally, there's going to be a special contact section in the application where we're going to ask for your executive director contact, a primary contact, and an external grant writer contact. This will be new with giving data but incredibly self-explanatory. And then actually jumping into the application. You'll want to state your mission. You'll want to talk about how your work is promoting racial justice and accessibility externally. So with individuals you're serving or with a broader community. And just like with Beloved Community, this can cover policy, education, research, any type of advocacy. There are lots of different ways that your organization may be doing this, and we want to hear about that. And then, again, in the spirit of collaboration, we want you to list other organizations that have a similar mission. Again, it might not be doing the exact same thing that you are doing, but might be similar. And in particular, we want you to think about those organizations that are led by people of color and then want you to describe how you're working with them for that mutual success.

And then we want to know how would a grant contribute to that overall systemic change. And this is incredibly important, especially as we talk in a moment about multi-year because we're really looking at that systemic change. So spend time really thinking about how you might talk about your organization's role in creating systemic change to make a more equitable community. And then we want to know about success. We want to know how your organization currently measures success. How will you know if the project or your organization is being successful? And then for larger organizations that have a budget of over a million dollars, we want to know what metrics you're currently collecting and your evaluation strategy. And then we also want to know how do you ensure your data isn't racist. If you check out our blog, Katie has a blog post from last year where she talked a little bit about this with more information. And also feel free to reach out if you have more questions or want to talk about this in particular.

And then similar to what Robia talked about earlier related to equity, we're really trying to work hard to operationalize and ask more specific questions around equity. Again, not asking for perfection, but rather progress. So these are going to be the exact same questions as those in our Beloved Community application and really ask that you take the time to do some reflecting. So, first, of course, is board membership. You'll indicate where your organization is currently at and then spend some time reflecting on how you're taking action to make progress in this area. Or if you've reached that 75% threshold, how you're really ensuring that you're going to continue to maintain this for your organization. And then, again, senior leadership. This includes anyone who has oversight of the organization or teams, indicates sort of the makeup of your senior leadership. And then, again, that reflection on how you're taking action to make progress or maintain the work in this area. And then professional development.

Want a description of any cultural competency trainings your staff has engaged in the last year. And again, want that reflection on how you are taking action to make progress. And then, finally, policies and procedures. Talking about how your policies have been reviewed, who's conducting the review, and then how you're taking action to continue to review policies for bias as well, too. And then just like Robia talked about earlier in the Beloved Community, we know there are many different ways that

organizations are working towards equity. And these are just some of the ways that you can talk about. But choose no more than three to talk about in terms of the work that your organization is doing. And again, if your organization is not taking action in any of these areas, please describe how your organization might take action in the future. And then, again, want you to do some reflecting on what has been challenging. I will tell you that being honest about your challenges isn't going to impact your ability to get funding.

We know every single organization has their challenges. We have our own challenges. And really, this is about us understanding where additional needs for support are. So it really is OK for you to take some time and be honest about what your organization is experiencing because it allows us to better understand how we can support you. And then we'll have a couple of budget questions. We want to know what your current budget is and then actually ask you to upload that budget in whatever form you currently use. We just want to make sure that all of your income and all of your expenses is included in any budget that you upload. And then we want to know what your projected budget is for 2024, so for next year in this next question. And then this is where we move into our pilot multi-year grant phase. We're really excited and really want to offer this to organizations because we really believe that a part of being a trust-based funder is offering flexible, multi-year grant support. So we're doing a pilot this year and we are allowing organizations that have received at least five years of funding to ask for multi-year grant support.

And in order to qualify, the organization needs to be working on broad systemic change in the community that's focused on equity. And we have more information about eligibility that will be available on our website. If you as an organization are not sure, if your organization has received five years of funding, please do not hesitate to reach out to us. And so then what we'll do is we'll ask you to list the funding that you're requesting for each year. If your organization is only requesting one year of funding, you'll only have to fill out the dollar amount that you're requesting and operating, capital, or event dollars for that first year in 2024. If your organization is requesting multi-year, you'll need to go in and actually put in how much you're requesting for each of the following years. Again, if you have questions about this, this is new for us, so please don't hesitate to reach out or drop into one of our office hour sessions. And then, finally, we want to know the total dollar amount you're requesting.

So if it's one year of funding, what is the total dollar amount of funding you're requesting for that year? If you're asking for multiple years of funding, what is the total amount across those multiple years that you are requesting? And then, finally, we also offer capital campaign support as part of the Capacity Building application. So this section is completely optional. If your organization is not requesting capital support, you can skip this section. If you are, we are going to have a couple of questions where we're going to have you upload some attachments. First is a case statement, which is the opportunity for you to really discuss the feasibility and cost of the capital campaign and also how it will impact your ongoing operational expenses. And then we want you to include any type of fundraising you've done thus far and any pledges that you've secured to date. Also, just so you know, any organization that we fund for capital needs to have an explicit use of minority-owned businesses as a part of their capital project.

And then also, we have any other specific budgets related to funding support, sources of income, and expenses that you'll be able to upload as well too. And then just like in Beloved Community, we have some optional questions. Again, this does not impact whether or not you get funding, but we'll ask about your interest in engaging in advocacy. And then also we'll ask about your biggest needs. And these

two questions, again, completely optional. You can decide not to answer those and still be able to submit the application. If you do answer them, though, they're truly for just informational purposes. And then, finally, we have any other optional information that you'll want to share with us and then any other optional attachments. We do ask with these attachments, don't create anything new. We do get a large number of requests, so we may not be able to read everything that you upload for this last question But if you have an annual report or something that you've already created, please feel free to upload it there.

So that is the Capacity Building Grant Application. A couple of key dates to remember. Our grant application opens on Monday, July 17th. It will close on Monday, August 28th at 5pm Central Standard Time. And then, finally, we will make decisions by mid-December. Thank you all so much for joining us. Please reach out with questions. We hope to see you in a future application session or in one of our office hours. Have a great day.