

WEITZ FAMILY FOUNDATION GRANT APPLICATION VIDEO TUTORIAL TRANSCRIPT

DIANA: Hello and welcome to the Weitz Family Foundation Grant Application overview. I'm Diana Martinez, Program Associate. Today we're going to spend some time talking through the grant application. This is our agenda for today. First, we'll be talking through the grant application timeline and the virtual office hours. We'll also share an overview of the two types of grants you can apply for and general guidelines. Then we'll spend some time talking through the Beloved Community application and the Capacity Building application. And finally, we'll review key things to remember as you're preparing your application. So, taking a look at our timeline for the year, we start with grant applications opening in mid-July and closing in late August.

Please refer to our website for the specific dates this year after applications are due, our team will take a few months to review, assess, and make final recommendations at our board meeting before all applicants are notified of final decisions in December. We will be hosting virtual office hour sessions for new applicants and for current grantees via Zoom throughout the duration of our open application period. If you have questions specific to you or your organization, we really recommend attending one of our virtual office hours. Attendees are let in from the waiting room one at a time for a brief one-on-one to attend a virtual office hour. You can simply click the links featured on our website.

OK, so we have two grant categories: Beloved Community and Capacity Building. The Beloved Community category grants up to \$20,000. Capacity Building Grants Awards \$21,000 or greater. Both grants are distributed as unrestricted general operating dollars. Robia and Emily will go over these applications in more depth, including eligibility for multi-year grants. For both of these categories. We fund 501(c)3 organizations based in Omaha, Nebraska across a range of focus areas. But we are primarily looking to fund organizations doing systems change work, advocacy work, or uniquely providing culturally competent and accessible direct services.

We do not fund organizations centered on religion, sports, animals, and the environment. We are also not accepting new requests related to pantries, early childhood and mentoring, or after-school programs. Note that we rarely fund organizations outside of the Omaha area. If you have questions about your organization's eligibility, we encourage you to attend a virtual office hour. The applications for Beloved Community and Capacity Building have a lot in common, with the application for Capacity Building Grants being

slightly more comprehensive.

Please note that to apply, you'll have to choose one of the two grants to apply for. You're only eligible to apply for one kind of grant, so either Beloved Community or Capacity Building, not both. New applicants are only eligible to apply for Beloved Community. In terms of general guidelines, though, the whole application is important, we encourage you to be the most thorough and thoughtful when answering the questions centered on equity and accessibility. Please check our website for this year's submission deadline, and you'll be notified in December about the status of your application.

Lastly, when you enter the application text into the portal and as the team goes over the application questions, you'll see some word counts. The word count totals you see are suggestions and not requirements. So, please use the space you need to be thorough and thoughtful within reason. We will continue to use GivingData for application, submission, review, and management. If you're not familiar with GivingData, we strongly encourage you to refer to the GivingData FAQs or GivingData tutorial video on our website. If you have login questions, email our grant administrator, Rose Christiansen, at rose@weitzfamilyfoundation.org. And I'm going to hand it over to Rose to talk a bit about GivingData.

ROSE: Thanks, Diana. Yes. As she mentioned, GivingData is the platform we use for our grant application and management. If you have applied for a grant with us within the past three years, your organization should already have an existing GivingData account. But if you are unsure which email address you've used in the past, please reach out to me, and I can verify that for you. If you are a new applicant, you will need to create a new account in order to submit.

I have recorded a separate video that is on our tutorials page that will walk you through how to both set up an account, as well as how to navigate the portal. That being said, if you run into any issues, please feel free to reach out with questions. My email address is rose@weitzfamilyfoundation.org. And now I will turn it over to Robia to walk you through the Beloved Community application.

ROBIA: Thanks, Rose. Hi, everyone, it's Robia. Let's jump into our Beloved Community application. 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. It's a great way for organizations who are new, or at least new to us, to be introduced to our foundation. 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.

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, don't let that deter you. Additionally, if your budget is at or less than \$100,000, we recommend applying for Beloved Community. Given that we're unlikely to fund requests more than 20% of overall budgets. And when our applications do late August, feel free to check our website for the exact date and time.

So we start off with some basic information: your organization's name, tax ID, mailing address, website, and contact information for those who applied previously. This information should automatically populate in the system. You can simply review and edit where needed. The request section begins by asking for your mission, as well as a brief description and history of your organization. We're also interested to know 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 here we want to learn more about what organizations' understanding is of one another and how people are collaborating. So, we ask that you write about what other organizations have a similar mission, 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 is to prioritize and support systemic change that transforms our community into an equitable place to live.

So, how would a grant from us fulfill that mission? What would the grant be going toward? These next set of questions center on what we as a foundation really value, which is equity. 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 want to see how you're making active progress and what steps you're taking, shifts you've made, challenges you've faced, or approaches that helped your team grow over the last one year.

Therefore, it's imperative that you describe yourselves honestly and how you are or would like to grow related to what we'll cover in the next few slides. If you would prefer to share your responses to these specific questions and conversation, you're welcome to reach out to myself or Diana if you're a current grantee, or Emily for all other applicants. With consideration to both board membership and senior leadership, how are you working to ensure these two teams, respectively, are reflective of the community your organization serves? You'll answer these questions within the context of the last one year.

Regarding professional development, we'd like people to share what learning or training your team has done to deepen your all's understanding of the various and often intersectional diversity within the communities you work with. Describe what those opportunities were in the last one year and go further. Share what your team took away from them and how they enriched your work. Next, we're curious to know how you've taken time over the past year to review internal policies by looking at language or practices that might unintentionally exclude or make it challenging for individuals on your team to feel supported.

We'd like you to share who was involved and how you plan to keep moving that work forward, or how you would like to grow in this area. Finishing up this section, we realize that organizations can and have built equity and accessibility in areas beyond the four that we just reviewed. So, here we offer applicants a chance to highlight work you all are excited about. We ask that you describe one to three of these areas. If you're not necessarily taking action right now. We'd like you to speak to how you might in the future.

And as a second part to this, we want to hear which aspects of equity work have been most challenging to navigate. We really ask this because we want to understand what obstacles people are experiencing, so we can support and address those barriers to progress. Moving on to some financial information, we start with entering your organization's fiscal year-end, your current year's budget information, and anticipated budget for next year before uploading a copy of the current year's budget document. 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. You'll then have the opportunity to share context behind major changes that are more than 20%, or anything else that you would like us to know about it. So, we are indeed continuing to offer multiyear funding opportunities for both of our applications, which we're really happy to be able to

do. Eligible organizations are ones that have received funding for at least five years and doesn't have to be consecutive. They are engaged in advocacy, community organizing, or collective action to address root problems of poverty, racism, or other inequities.

Or they meet a unique need to provide culturally competent and accessible direct services. And they actively work to improve the organization's racial equity and accessibility. So, you would select yes or no regarding multiyear funding up to three years, depending on your eligibility and interest here. So, following that up, we'll have you enter the amounts you are requesting each year for up to three years if you're applying for multiyear funds. If you're applying for just this upcoming year, you can type your amount in that corresponding box and leave the remaining blank.

The last question here then asks for the grand total amount you are requesting from us this cycle. So, you would simply add up the numbers above and put them here. If you're applying for the upcoming year, only you can copy that number again in this box. So, wrapping up, Beloved Community, are these additional information questions. Firstly, we want to know how you heard about us. Please share that here. And also mention if someone in the Weitz family has had any board or service history at your organization.

Secondly, our team is curious to know what subjects you would be interested in learning from and discussing with other organizations we support at future forums, which are grantee-driven conversations about a particular topic that permeates the work of many, if not all, nonprofits. Alrighty. Well, thanks for coming along for the ride. As we reviewed Beloved Community application questions, I'll pass it over to Emily, who will share all about Capacity Building.

EMILY: Thanks, Robia. We are going to move on into Capacity Building. As I talked today, there will be many questions that will be very similar to the Beloved Community application, with a couple of additional questions. So, first, Capacity Building are grants that start at 21,000. We do not have a maximum amount, but do suggest that you reach out to your program associate to discuss specific requests. And again, these are for Omaha-based organizations that have a mission that really is focused on supporting systemic change and really systemic change that focuses on creating a more equitable community.

And again, what do they do typically late August? Please see our website for exact dates. So, first off is going to be your organizational contact information, similarly to the Beloved Community application. This information will be already populated in Giving Data. So, all you need to do is double-check and make sure that it is correct. It is important that you double-check the contacts, because these are contacts that we use to actually communicate on a regular basis. Send grant notifications and our newsletter as well. Then we want to know your mission.

And then we also want to know how your work is promoting racial justice externally. So, think about this in terms of your work with clients and within the broader community. We also, similar to the Beloved Community application, we want to know what other organizations have a similar mission to yours, particularly those led by people of color. And don't forget to also talk about how you're working with these other organizations. That is very critical. We ask in this question that you don't just put a list, but instead tell us about how you're working together for mutual success.

And then finally, just like within Beloved Community, we want to understand how a grant from us connects to our broader mission to support that systemic change. We really want to understand how this grant will help build your organization's capacity or leadership. And then these are new questions for the Capacity Building Grant. First, we want to understand how does your organization currently measure success? You can think about that in terms of your entire organization, your mission. If you're thinking about this request within a specific program, talk about the program or project.

Really take some time to tell us what success means to you. And then, if you are an organization with a budget over \$1 million, we want to understand those specific metrics that you collect. How do you think about an approach evaluation, and also how do you ensure that your evaluation and data collection techniques aren't racist? We have a great blog post on our website that you can check out for more information. And then finally, we also want to understand how your organization engages in advocacy. Now we define advocacy very broadly.

And so when you think about advocacy, this could be as simple as lifting voices of the people that you are serving, and also thinking about community organizing, working with policymakers, etc. We really want to understand the connection with your mission and our mission to really create that systemic change. And advocacy is a key tool as we think about

making that change. And then, just like with the Beloved Community application, we have some questions about equity. And I want to reiterate what Robia has said for us: it is very much about progress, not perfection.

We as an organization are on our own learning and growth journey, and so we understand that organizations will be on their own journey as well. So, honesty is much appreciated in all of these questions. Again, if you're not comfortable completing this section, please reach out to one of us on the team to have a conversation about this work. So, of course, within the last year, we want to understand how both your board and your senior leadership reflects the clients or broader community that you are serving. We also want to understand that learning.

We believe that internal learning is incredibly important and able, in order to be able to support and provide services externally. And just like Robia said, it is incredibly important to also talk about those takeaways. What is your team doing with the information that they learned? How is it impacting the work that you are doing? Again, this is another question to not just list trainings, but give us the background and how you're actually utilizing what your team learned. And then, of course, wanting to look at policies and procedures, both in terms of what you've already done, but also what you would like to grow into.

Again, I want to reiterate progress, not perfection. And honesty is incredibly important to us. And then, of course, there are so many different ways that organizations are thinking about growing in their equity and accessibility work internally. So, take some time to talk about things that you are really proud of or things that you're considering trying. Again, honesty and transparency in this section is incredibly important. And then we always want to know what parts of this work feel the hardest.

We talk to many different organizations, and it helps us understand if there are broader themes or trends that organizations are experiencing, and also a chance to get other organizations connected to each other. So, it's helpful to understand some of the hardest parts of this work, and then we move into the financial information again, just like with Beloved Community, we want to know your fiscal year-end. We want to know your current budget and your anticipated budget for next year.

We completely understand that in the middle of the summer, early fall, it's hard to know what that number is. So, it is perfectly OK if it is just an estimate. And then we want you to upload a copy of your current budget. Please make sure you have both revenue and expenses within that budget. And then, of course, if there are going to be any major changes to your budget, more than 20% is how we define that. Please take some time and tell us a little bit about what's going on and really why those changes are occurring. And then, just like with Beloved Community, we also have multi-year support available within Capacity Building.

Again, organizations are eligible if they've received at least five years of funding, are engaging in advocacy, organizing collective action, or meeting a unique need to provide culturally competent and accessible direct services. We also want to ensure that organizations are working to improve their internal racial equity and accessibility. If you're unsure if your organization qualifies, please feel free to reach out to someone on the team. Once you've decided if you are going to request multi-year, then you will see the opportunity to request operating for year one, two, and three capital and then event support.

This is incredibly important that if you have any upcoming events that you would like to request support for, please include that here. Also then for each year you will want to enter a total amount. Then we want to understand a little bit more about event support, if that is what you are requesting. We want to understand the purpose of the event and also want to understand what other folks you'd like us to invite. We believe events are a chance to make connections and want to help support those connections. And then at the very end, you'll list the total amount that you are requesting over all three years of the grant.

One optional opportunity within the Capacity Building Grant is a capital request. Want to be really clear that when we give to capital projects, we want to see at least 10% of the overall project going to small and emerging businesses. If you have questions about that, feel free to reach out to us. If you're requesting capital, we ask that you upload a case statement. This often includes the feasibility renderings, purpose statements, and total cost of the capital campaign. It really helps us understand why you're building this building and what kind of impact it will have. Then we also ask that you upload a budget that includes income and expenses.

And then also if you have pending asks as well. And then finally, we want to know how you heard about us, as well as if any Weitz family member has any volunteer or board service within your organization. And then finally, we want to understand where do you want to learn what topics, ideas, issues are important and would be helpful to discuss, either with other organizations or in other training programs that we could offer in the future. So, with that, I'm going to turn it back over to Diana to wrap us up.

DIANA: Thanks, Emily. Here are some reminders and final things to keep in mind. In order to apply, you must have a 501(c)3 designation or a fiscal sponsor that does. You must be based in Omaha, Nebraska. We do not fund organizations centered on religion, sports, animals, and the environment. We are not considering new requests related to pantries, early childhood, and after-school programs. Organizations who have not previously received funding from us are only eligible to apply for Beloved Community, and organizations can only apply for Beloved Community or Capacity Building, not both.

Be sure to review the criteria for multiyear eligibility before applying. Current multiyear grantees are not eligible to request additional funding for the duration of their contract, except in the case of emergency. We are unlikely to fund more than 20% of total operating budgets and or more than 50% of an individual salary, and for capital requests, we expect either 10% or the entirety of our grant, whichever is less, to go toward contracts with small and emerging businesses. And please contact Rose, our Grants administrator, for GivingData help, or application-related accessibility at rose@weitzfamilyfoundation.org.

If you have any questions, consider attending our virtual office hours. You can find the dates and times for these, along with the Zoom links for them, on our website. Applications will open mid-July. All applications are due late August, and all applicants will be notified about final decisions in mid-December. We look forward to reading your application. Thank you so much for watching.