



Grant Workshop

Lutheran Congregations

Welcome to The Lutheran Foundation's online grant workshop instructions.

Grant Cycle: Summer 2020

- Workshop
 - The attendance requirement for the June 1 grant application deadline has been waived.
- **Grant Application: June 1 (noon)**
- Board Decision: August 31
- Communication/Email of Decision: September 10

This presentation is for the Summer 2020 grant cycle with an application deadline date of June 1 at noon. The Board decision will be communicated by email to the Grant Contact by September 10, 2020.

Focus Statement

The Lutheran Foundation invests in Lutheran and community organizations to **advance Gospel sharing** and **promote mental wellness** that silences the stigma of mental illness.

The Focus Statement will be reviewed and used as a filter when evaluating grant applications.

TLF Grant Policies

- Grant Funding: Minimum of \$1,500
 - Cannot combine multiple projects in one application
- Technology: 50% of project
 - 50% of each line item
- “Pass-through” funding: not accepted

The amount requested from The Lutheran Foundation must be a minimum of \$1,500.

Technology applications will be funded at 50% of each line item.

Pass-through funding is defined as when the grantee (Congregation) does not use the award, but instead distributes the funds to another individual or organization.

TLF Grant Policies

Mission Trips

The financial support for mission trips will be considered based on the following:

- Regional mission trip – up to \$200 per person within TLF's 10-county service area in northeast Indiana
- Domestic mission trip – up to \$400 per person to anywhere in the United States
- International mission trip – up to \$600 per person to anywhere outside the United States

TLF Grant Policies

Mission Trips

- The application must align with the minimum amount outlined in the grant guidelines
- Joint submissions will not be accepted
 - Each organization must submit an individual application
- The application must include the date and location of the trip
- A list of confirmed individuals attending must also be submitted with the grant application

When planning a Mission Trip do not submit the application too far in advance of the event since the application must include the date and location of the trip. Also a list of confirmed individuals attending must be provided with the grant application.

TLF Grant Policies

Youth Gatherings and Conferences

- The application must align with the minimum amount outlined in the grant guidelines
- Joint submissions will not be accepted
 - Each organization must submit an individual application
- Similar to a Mission Trip the application must include the date of the event/trip, location of event/trip and number of individuals attending
 - A list of confirmed individuals must be provided to TLF when the application is submitted
- The application will be considered at no more than 50% of each expense line item up to \$1,000 per participant

Similar to a Mission Trip, the standard grant guidelines apply for Youth Gatherings and Conferences with the additional requirement of the event date, location and confirmed number of individuals attending. However, Youth Gatherings and Conferences do not have a cost per trip. Instead this type of application will be considered at no more than 50% of each expense line item up to \$1,000 per participant.

TLF Grant Policies

New Staff Position

- Year 1: Will consider at 75% (salary, benefits and initial start-up)
- Year 2: Will consider at 50% (salary and benefits)
- Year 3: Will consider at 25% (salary and benefits)
- The intent is for the congregation to continue the position beyond the third year

The new staff position is intended to assist Congregations financially the first three years with the expectation the Congregation will be able to sustain the position beyond year three.

TLF Grant Policies

Capital Requests

- Will consider on a matching basis only
- Will consider up to \$300,000 not to exceed 50% of the total cost
- Only one application can be submitted per project (multiple phases are one project)
- The project must begin within **one year** of the Board approval date

Although it is not a priority, The Lutheran Foundation is willing to consider Capital projects.

Application Submission

- Application must be complete, and all required attachments must be submitted
 - Attachments include:
 - Budget (choose either Project/Program or New Staff Position)
 - Fiscal Year End Report (actual vs budgeted and must reflect income and expenses)
 - Position Description (if request is for New Staff Position)
 - Confirmed Participant List (if request is for Mission Trip or Conference)

Since each application requires the Budget attachment, the instructions to complete the budget form will be reviewed first on the next few slides.

Budget Requirements

- The Request Amount on the application must match the Total Expenses of the TLF Grant Funding column on the budget (Column B)

Request Information

* Request Amount

This amount must match the Total Expenses of the TLF Grant Funding column on the budget. (Column B)



LC Budget (Project/Program Support)

Instructions:

• Enter amounts in the TLF Grant and Organization/Other Funding columns only for each line item since the spreadsheet has formulas to auto calculate the Total column.

- Organization/Other Funding column cannot include funding from any other TLF grant.
- Insert rows as needed and delete extra rows. Use even dollar amounts only (no cents).

Organization Name and City	
----------------------------	--

Organization Name and City	
TLF Grant Funding requested is	#DIV/0! of the Total Expenses.

Column A	Column B	Column C	Column D
Expense Item	TLF Grant Funding	Organization/ Other Funding	Total
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
TOTAL EXPENSES	\$ -	\$ -	\$ -

NOTE: The TLF Grant Funding total MUST be the same as the "Request Amount" and the total of all columns MUST be the same as what was entered for "Total Project Budget" on the Application.

Budget Requirements

- The Total Project Budget on the application must match the Total Expenses of the Total column on the budget (Column D)

* Total Project Budget

This amount must match the Total Expenses of the Total column on the budget. (Column D)

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LC Budget (Project/Program Support)

Instructions:

- Instructions:**
- Enter amounts in the TLF Grant and Organization/Other Funding columns only for each line item since the spreadsheet has formulas to auto calculate the Total column.
 - Organization/Other Funding column cannot include funding from any other TLF grant.
 - Insert rows as needed and delete extra rows. Use even dollar amounts only (no cents).

Organization Name and City		
TLF Grant Funding requested is	#DIV/0!	of the Total Expenses.

Column A	Column B	Column C	Column D
Expense Item	TLF Grant Funding	Organization/ Other Funding	Total
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
TOTAL EXPENSES	\$ -	\$ -	\$ -

NOTE: The TLF Grant Funding total MUST be the same as the "Request Amount" and the total of all columns MUST be the same as what was entered for "Total Project Budget" on the Application.

Application Requirements

- Declined if required templates are not used
- Declined if required attachments are not included with submission
- Declined if any overdue reports
 - Contact the office to confirm no overdue report by sending an email to Kimberley@thelutheranfoundation.org

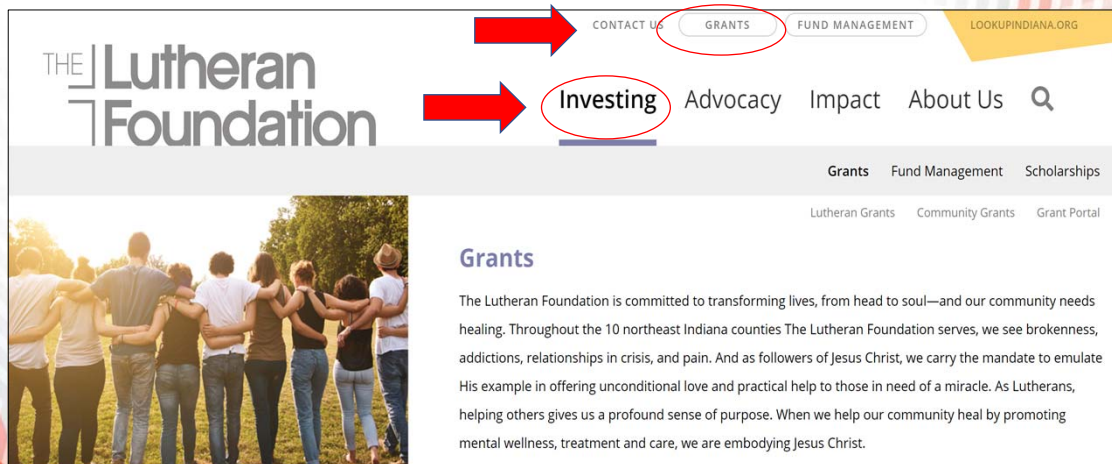
Listed are the important grant application requirements. These requirements will be reviewed again later in this presentation as they are found under the “Eligibility” tab of the application process.

How to Apply

- In order to begin a grant application, go to The Lutheran Foundation homepage

thelutheranfoundation.org

To apply, click on the **GRANTS** button at the top of the screen, or hover over **Investing** and select Grants in the drop-down menu



Hover over “Investing” and select *Grants* or click directly on the “Grants” button at the top of the page, either option will bring you to the next page on the website.

Lutheran Grants

As a Christ-centered ministry of the member Lutheran congregations, The Lutheran Foundation is dedicated to partnering with our Lutheran community in demonstrating the compassion of Christ by encouraging mission and ministry expansion by the Lutheran community. The Lutheran grants are established to foster outreach, support programming, and promote capacity-building ministry opportunities in our Lutheran congregations, Lutheran schools and other Lutheran ministries within our 10-county region. In keeping with the history of The Lutheran Foundation, which was created out of the sale of the former Lutheran Hospital, The Lutheran Foundation particularly desires to support ministry activity that promotes the spiritual, mental and physical health of people in our community. A grant request must be a minimum of \$1,500.

[LEARN MORE](#)

Scroll down on the page under “Lutheran Grants” click on “Learn More”.

At the bottom of this page click on the plus sign next to the appropriate grant category

Lutheran Congregation Grant

+

Lutheran Education Grant

+

Lutheran School Support Grant

+

Lutheran Ministry Grant

+

Since you are applying for a Lutheran Congregation Grant, select “+” to proceed.

In the How to Apply section you will find the link to the application

The budget form can now be found in the application under the Attachments section

Deadlines

Fall: Applications are due September 1 (noon); Decisions are made by December 15.

Spring: Applications are due March 1 (noon); Decisions are made by May 31.

Summer: Applications are due June 1 (noon); Decisions are made by August 31.

If the grant deadline falls on a weekend or holiday, it is extended to the next business day at noon.

Notification of the grant decision will be emailed by the 10th of the following month.

How to Apply



1. Review the Focus Areas to ensure your organization aligns with The Lutheran Foundation mission.
2. The Grant Workshops scheduled for April 15 and 16 have been cancelled.
 - The attendance requirement for the June 1 grant deadline has been waived.
 - By April 15, we will post a link here with an abbreviated PowerPoint presentation that you can refer to as you prepare to complete a grant application by the June 1, 2020 (noon) deadline.
 - Our staff is available to assist with any questions you may have, especially if you are a first-time grant applicant. We are happy to talk with you about the project your congregation is considering, completing the grant application, or accessing the grant portal.
 - If you have any immediate questions, please email our Grants Manager [Sue Faust](#) or call her at (260) 458-2105.
3. ~~Submit your application by noon of the date required for your grant cycle (detailed above).~~
 - [Lutheran Congregation Grant Application](#) (The link for the budget form can be found in the application under the Attachments section.)

Scroll down to “How to Apply” and click on the “Lutheran Congregation Grant Application” link under #3.

Sign into the grant portal

Please Sign In

Internet Explorer is the recommended browser for all online grant applications and reporting requirements.
If you do not use this browser you take the risk that information may not be saved.

- If you have an account, please log in using your E-mail Address and Password.
- First time online applicants, please use the "New Online Applicant" link found below.

E-mail

[New Online Applicant?](#)

Password

[Forgot Password?](#)

Login

Enter the applicant email and password to begin the application process. It is recommended that each Congregation share an applicant email and password to ensure the grant history and reporting requirements are available under one applicant.

Request Information

Narrative

Contact Information

Attachments

Final Instructions

Eligibility

Office Use Only

Review My Application

Request Information

Printer Friendly Version | E-mail Draft

* Required before final submission

Congregation Information

* Congregation Name

* Street Address

* City

* State

* Zip Code


* Congregation Phone

* Website

* Fiscal Year

(mm/dd-mm/dd)

Complete the information requested. The fiscal year requires the month and date only - for example if your fiscal year is calendar based it would be 01/01 to 12/31. No year is required.



Follow all instructions for each question (highlighted in red)

Project start date **MUST** be the first day of a month

Project End Date **MUST** be the last day of a month

The grant period **MUST** be a minimum of 3 months

Request Information

- * Request Amount

This amount must match the Total Expenses of the TLF Grant Funding column on the budget. (Column B)
- * Total Project Budget

This amount must match the Total Expenses of the Total column on the budget. (Column D)
- * Grant Purpose

Limited to a maximum of 10 words.
- * Project Start Date

This date must start on the first of the month and cannot be prior to the grant decision date.
- * Project End Date

This date must end on the last day of the month and the grant period must be a minimum of 3 months.

If your congregation is submitting more than one application, you **MUST** prioritize in order of importance.

Priority Number

Complete each section – The Grant Purpose should describe the grant request succinctly . For example, Youth Mission Trip to Arizona July 2020. The Project Start date cannot be prior to the Board decision date. For this cycle it may not begin prior to September 1st. The Project End date must be at least 3 months and be the last day of the month. Priority number is required if you are submitting more than one application during this cycle.

Attachments	
<p>The following attachments are required and the application will not be considered if incorrect information is submitted with the application. If you need clarification or additional information to ensure you are submitting the correct information, please call our office for assistance at 260.459.2112.</p>	
<p>* Lutheran Congregation Budget</p> <p>Provide a detailed breakdown of all expenses. List each line item on your budget. Click on one of the following links to access the REQUIRED budget template</p> <ul style="list-style-type: none"> • Project/Program Budget • New Position Budget <p>The budget template will download but will not save automatically. You will need to save it in a folder so you can upload it prior to submission. The file name for this attachment must be "Budget"</p> <div> <input type="button" value="Choose File"/> No file chosen <input type="button" value="Upload"/> </div>	
<p>* Fiscal Year-End Report</p> <ul style="list-style-type: none"> • Provide the congregation's most recent fiscal year-end report (12 months) with revenues and expenses (budget vs. actual). • The file name for this attachment must be "FYE Report" <div> <input type="button" value="Choose File"/> No file chosen <input type="button" value="Upload"/> </div>	
<p>Job Description</p> <ul style="list-style-type: none"> • This is ONLY required if the request is for a staffing position. • The file name for this attachment must be "Job Description" <div> <input type="button" value="Choose File"/> No file chosen <input type="button" value="Upload"/> </div>	
<p>Confirmed Participant List</p> <ul style="list-style-type: none"> • This is ONLY required if the request is for a mission trip or attendance at a conference. • The list must be numbered and in alphabetical order. • The file name for this attachment must be "Confirmed Participant List" <div> <input type="button" value="Choose File"/> No file chosen <input type="button" value="Upload"/> </div>	

Budget forms are linked within the application
Select the appropriate budget to download
Once the form is complete, save to your computer, then upload to application

Job Description is only required if request is to fund a new position

Confirmed Participant List is only required if the request is for a mission trip or conference attendance

The budget forms are linked within the application. However, you will still need to click on the appropriate link and download the form. (Only one budget form should be selected for the application.) Once the budget form is complete, save it to your computer to upload as an attachment with the application. To upload you will need to select "choose file", search for the completed form on your computer and "open" or "select", and then "Upload". The file name will appear in the "choose file" box once the form is selected.

The Fiscal Year-End Report should be a document from the Congregation that is saved as "FYE Report" on your computer. The FYE Report will be selected and uploaded as an attachment.

The Job Description (if applicable) will be a document created and saved as "Job Description" on your computer. The job description will be uploaded as an attachment from your computer

Confirmed Participant List (if applicable) will be a document created and saved as "Confirmed Participant List" on your computer. The list will be uploaded as an attachment from your computer.

THE Lutheran Foundation

Request Information

Narrative

Contact Information

Attachments

Final Instructions

Eligibility

Office Use Only

Review My Application

Final Instructions

Printer Friendly Version | E-mail Draft

* Required before final submission

Important Steps to Follow

- Complete all sections of the application.
- When you are ready to submit, scroll to the bottom of the screen and click on the "Review and Submit" button.
- This step will show the entire application. Review it to ensure everything is complete and all attachments have been uploaded.
- The application is not yet submitted as you will need to complete one final step.
- To submit your application, scroll to the bottom of the screen and click on the "Submit" button.
- You will receive a message in red on the screen that states "Thank You! Your application has submitted.
- You will also receive an auto-generated email from The Lutheran Foundation confirming your application has been submitted.
- NOTE: The Lutheran Foundation will not receive your application until you have followed the steps outlined above.

Save & Finish Later

Next

Read the steps to make sure everything is completed. Select "Next" to continue.

The screenshot shows the 'Eligibility' section of an application form for The Lutheran Foundation. The form has a header with the organization's logo and a navigation bar with tabs: Request Information, Narrative, Contact Information, Attachments, Final Instructions, Eligibility (selected), Office Use Only, and Review My Application. Below the navigation bar, the title 'Eligibility' is centered, with links for 'Printer Friendly Version' and 'E-mail Draft' to the right. A note indicates that the information is 'Required before final submission'. The main content area states that the following items determine eligibility for any application with The Lutheran Foundation. A bulleted list of requirements follows, with the minimum amount of \$1,500 circled in red. At the bottom, there is a statement of agreement and two buttons: 'Save & Finish Later' and 'Next'.

THE Lutheran Foundation

Request Information | Narrative | Contact Information | Attachments | Final Instructions | **Eligibility** | Office Use Only | Review My Application

Eligibility [Printer Friendly Version](#) | [E-mail Draft](#)

* Required before final submission

The following items determine eligibility for any application with The Lutheran Foundation.

- I understand The Lutheran Foundation's (TLF) service area covers Adams, Allen, DeKalb, Huntington, LaGrange, Noble, Steuben, Wabash, Wells, and Whitley counties in northeast Indiana.
- I understand The Lutheran Foundation's Grant Guidelines, Focus Areas and Values.
- I understand the minimum amount for an application is **\$1,500**.
- I understand this application will NOT be considered if the congregation has any overdue reports. If you are unsure about overdue reports, please contact TLF.
- I understand this application will NOT be considered if the congregation does not use the required templates.
- I understand this application will NOT be considered if the required attachments are not included with this submission.
- I understand submission of an application does not guarantee funding.
- I certify the Senior Pastor and Congregational President have authorized the submission of this application. (If the congregation is currently without a Pastor, then a vacancy Pastor must authorize the submission.)
- I certify the information contained in this application will be factual to the best of my knowledge.

By submitting this application, I agree to the conditions outlined above.

[Save & Finish Later](#) [Next](#)

Read the Eligibility requirements. Remember, the amount requested from The Lutheran Foundation must be a minimum of \$1,500 for each application; the application will NOT be considered if there are any overdue or outstanding reports; the required template must be used; and you must provide the required attachments. Select “Next” to continue.

Review your application before submitting. Any missing information will be listed here.

Request Information
Narrative
Contact Information
Attachments
Final Instructions
Eligibility
Office Use Only
Review My Application

Please correct the problems indicated below.

- Total Project Budget is a required field.
- Request Amount is a required field.
- Grant Purpose is a required field.
- Project Start Date is a required field.
- Project End Date is a required field.
- Baptized Membership is a required field.
- Communicant Membership is a required field.
- Average Worship Attendance is a required field.
- 1. Provide the mission, vision, and values of the congregation. is a required field.
- 1. Describe the project for which the congregation is seeking funding. is a required field.
- 2. If the congregation has completed a strategic plan/ministry plan in the past five years, describe how the request aligns with or supports the outcomes of it. If the congregation doesn't have a strategic plan/ministry plan, describe how the request aligns with or supports the goals or outcomes the congregation has recently established. is a required field.
- 3. Describe the congregation's current mission/outreach focus and how does it carry out the great commission? is a required field.
- 4. Describe the congregation's process for discipleship/faith formation. is a required field.
- a. Children Baptisms (Infant to 17 years old); is a required field.
- b. Adult Baptisms: (18 years old and older); is a required field.
- 1. Describe how the project aligns with The Lutheran Foundation's mission and vision: "... a Christ-centered ministry. ... dedicated to demonstrating the compassion of Christ ... by caring for people mentally, physically, and spiritually ... encouraging a whole-person approach to health." is a required field.
- 1. Describe how the project will be implemented. Provide a timeline of the project including specific dates and key activities. is a required field.
- 1. Describe the individuals who will most likely be impacted by the project and how they will be impacted. Provide supporting data. is a required field.
- 2. What is the anticipated outcome desired as a result of the project? is a required field.
- 1. Who will be the primary person(s) responsible for carrying out the project? is a required field.
- 2. Describe the responsibility or expectations of church staff and lay volunteers with the project. is a required field.
- 1. Describe how the congregation will evaluate the effectiveness of the project. is a required field.
- 2. What will be used to measure/identify effectiveness? is a required field.
- Phone Number is a required field.
- E-mail is a required field.
- Prefix is a required field.
- First Name is a required field.
- Last Name is a required field.
- Phone Number is a required field.
- E-mail is a required field.
- Reporting Requirements Email is a required field.
- Lutheran Congregation Budget - template must be downloaded from the website is a required field.
- Fiscal Year-End Report is a required field.

Review application will show all the fields that are not complete.

Once you have reviewed your application and submit, you will see this confirmation at the top of your page

A system-generated email will also be sent to the Grant Contact once the application has been submitted

It must state that "Your application has been **submitted**"

If it states "Your application has been **saved**," then it has not been submitted and can be found on the Grant Portal under the Applications In Progress section

Applications

Thank You! Your application has been **submitted**.

Welcome to your "My Application Page." This is the area where you will manage your work.

1. Select in progress or submitted in the drop down.
2. If you select submitted, you can only view the applications that you have submitted.
3. If you select in progress, you will be able to continue working on your application.
4. To delete an application, simply select the garbage can next to it.

Once the application has been submitted, a system-generated email will also be sent to the Grant Contact listed on the application confirming submission of the application.

Publicity and Acknowledgment

- Please refer to the publicity policy on the website at www.thelutheranfoundation.org, select “Media” at the bottom of the page



UPCOMING EVENTS

MEDIA

CONTACT US

Contact: Connie Minier, connie@thelutheranfoundation.org

The publicity policy may be found on our website at www.thelutheranfoundation.org, scroll down to select “Media”.

Contact Information

Sue Faust

Grants Manager

Direct Line: 260.458.2105

sue@thelutheranfoundation.org

- **Discuss grant policies, application questions, payments, reporting requirements and Grant Portal submission (primary contact for all grant related information)**

Kimberley Lichtsinn

Program Assistant

Direct Line: 260.458.2103

kimberley@thelutheranfoundation.org

- **Discuss application questions, payments, reporting requirements and Grant Portal submission**

Rev. Dr. Dennis Goff

Director of Ministry Programs

Direct Line: 260.458.2102

dennis@thelutheranfoundation.org

- **Discuss grant ideas and/or policies prior to submission of an application and during grant review**

Endowment Services Program

- Endowment Services may be found under the “Investing” tab on the website by selecting “Fund Management”
- If you have any questions or need information, please contact:

Terri Kortokrax, Director of Grants Management

Direct Line: 260.458.2110 or

Email: terri@thelutheranfoundation.org

If your congregation is interested in establishing an endowment with The Lutheran Foundation or if you have any questions regarding a current endowment, please contact Terri Kortokrax.

Look Up Mental Health Grant Initiative

Watch for additional information and updates

- Lutheran Congregations and Lutheran Schools
- Application Deadline: September 1, 2020 (noon)
- Grant Award: December 15, 2020
- Project Begin Date: No earlier than January 1, 2021
- One, Two, or Three-year project
- **Grant Workshops: Information will be announced soon**



TLF Annual Meeting
September 22, 2020 at 6:00 pm
Parkview Mirro Center

25th Anniversary
of
The Lutheran Foundation