



## **The David C. and Lura M. Lovell Foundation Designated Fund of the Toledo Community Foundation Grant Guidelines**

Toledo Community Foundation, Inc. is a public charitable organization created by citizens of our community to enrich the quality of life for individuals and families in our service area. The Foundation serves northwest Ohio and southeast Michigan with a particular emphasis on the greater Toledo area. The mission of the David C. and Lura M. Lovell Foundation (Lovell Foundation) is to fulfill the wishes of its founders and to share their good fortune through grants to deserving groups and organizations in the communities where its trustees reside. While the Lovell Foundation no longer has trustees that reside in the Toledo area, it has established a fund at the Toledo Community Foundation to honor the legacy of David C. and Lura M. Lovell, specifically in the area of mental health. The Toledo Community Foundation and the Lovell Foundation have partnered together to support programming in Lucas County, Ohio through the David C. and Lura M. Lovell Foundation Designated Fund (“Lovell Fund”). Grants from the Lovell Fund support a variety of organizations and programs in the field of mental health.

### Mental Health

The Lovell Fund envisions communities where mental health care is both barrier-and stigma-free as part of a broader approach to Integrative Health and Wellness. The Lovell Fund prioritizes programs that aim to reduce the stigma around living with and seeking services for a mental health issue. Grants are provided for programming, capacity building and, in limited cases, general operations. The Lovell Fund does not award grants to support drug and alcohol treatment programs. Grants are typically awarded for a one year project period.

Grants are awarded only to nonprofit, charitable organizations which have been designated as having tax-exempt status under section 501(c)(3) of the Internal Revenue Service code. For more information on other funding opportunities available through the Lovell Foundation, please visit its website at <http://lovellfoundation.org>.

### **Grant Application Process**

The Foundation considers grant requests one time annually. **The deadline for grant applications is March 1.** Proposals must be submitted through the Foundation’s online application process. The online application can be accessed via the Foundation’s website at [www.toledocf.org](http://www.toledocf.org). Proposals must be received by 11:59 p.m. of the application deadline in order to be considered for funding.

All grant applications are carefully reviewed by the Foundation’s professional staff and Board of Trustees. Applicant organizations are notified, in writing, of the approval or denial of funding requests. Project expenses incurred by an applicant organization prior to notification cannot be paid by the Foundation.

## Contents of a Proposal

The following information must be included in all proposals:

- **Cover Sheet Attachment** – Download and complete the Cover Sheet, which includes basic information and a brief description of the project. Upload this attachment on the last page of the online application, along with the other required attachments described below.
- **Purpose and Need** - State the goals and objectives of the project. Identify the problems or needs which will be addressed. Identify the population that will benefit from this project or program. (750 word limit)
- **Implementation** - Summarize the plans and timeframe for implementation of this project. Identify the individual(s) who will be responsible for overseeing the program and briefly describe their qualifications. (500 word limit)
- **Evaluation** - State the criteria and procedure that will be used to evaluate the success of the proposed program. Relate this evaluation to the stated goals and objectives. (500 word limit)
- **Support & Sustainability** - Identify plans for securing additional funding needed to complete this project and to secure ongoing support for this project once Foundation funds are expended. (300 word limit)
- **Project Budget Attachment** – Please attach a one-page project budget, which includes:
  - (1) projected income and expenses,
  - (2) all sources of project funding (solicited and received) and
  - (3) the period (beginning and ending dates) for which the funds are being requested.

**Due Diligence Attachments** – According to a new procedure instituted in 2017, the following attachments must be submitted with every grant application made to Toledo Community Foundation. Please pay close attention to the details or your application may be considered incomplete. Acceptable file types include Word, Excel and PDF only. Required attachments include:

- **Board List** - The names and affiliations of the organization's Board of Trustees.
- **IRS Letter** - A copy of the organization's tax exemption letter from the Internal Revenue Service.
- **Background** - Brief background and history of the organization, including when and how the organization was established, its mission or purpose, accomplishments to date and a listing of all current programs and services.
- **Financial Statements** - There are two options for submission of financial statements, which include:
  - (1) Option 1 - If the organization has had an audit prepared within 12 months of the date of application, please provide the full audit; or
  - (2) Option 2 - If audited financial statements for this time frame are not available, provide the unaudited income & expense statement (P&L) and balance sheet for the organization's most recent fiscal year-end. Note that both statements must be submitted if this option is selected.
- **Operating Budget** - A board-approved operating budget for the current fiscal year of the organization.

### The Foundation will not make grants from the Lovell Fund to:

- Organizations that discriminate on the basis of age, gender, race, ethnicity, sexual orientation, disability, national origin, political affiliation or religious beliefs.
- Faith-based organizations that do not serve persons outside of their membership, include proselytizing in programs, or condition receipt of services on belief in a particular faith.
- Building or capital campaigns.
- Endowments or board-designated reserve funds.

- General fund drives, such as United Way annual campaigns.
- Debt retirement or operating deficits.
- Indirect expenses unrelated to the proposed program; institutional indirect rates.
- Director donations or grants to individuals.
- Lobbying or political campaigns.
- Organizations primarily supporting individuals or programs located outside of the United States.

**For additional information, please contact:**

Anneliese Grytafey, J.D.  
Vice President, Strategic Initiatives & Grantmaking  
Toledo Community Foundation, Inc.  
300 Madison Avenue, Suite 1300  
Toledo, OH 43604  
Telephone: (419) 241-5049  
anneliese@toledocf.org