



BETHANY LEGACY FOUNDATION

2025 Grant Guidelines

TABLE OF CONTENTS

ORGANIZATION ELIGIBILITY.....	2
PROJECT ELIGIBILITY	2
BLF DOES NOT FUND	2
LEGACY 2030 – BLF’S 6-YEAR PLAN (2025-2030 STRATEGY)	3
TYPES OF GRANTS.....	4
Open Applications.....	4
Rapid Response Grants.....	4
Challenge Grants.....	4
Invitation Only.....	4
Operational and Unrestricted Funding.....	4
GRANT PRIORITIES	5
APPROVED GRANT REQUIREMENTS	6
Grant Agreement and Funding Transfer	6
Marketing.....	6
Reporting	7
BLF and Grantee Catch-up Conversations	6
Grant Closeout.....	7

ORGANIZATION ELIGIBILITY

- Organizations that are eligible to receive BLF funding are as follows: 501(c)(3) not-for-profit organizations, churches, state-accredited schools, and government entities. If your organization does not fall within those guidelines, you may apply with an eligible organization serving as your fiscal sponsor. When using a fiscal sponsor, a formal agreement between the grant applicant and sponsor will be required.
- Organizations based inside and outside of Jefferson County are eligible, however, priority is often given to projects that are located within Jefferson County, IN.
- Organizations that have been approved for a BLF grant are eligible to apply for additional BLF funding, even in the same calendar year. BLF provides grants on a needs basis.

PROJECT ELIGIBILITY

- Projects must have a direct impact on BLF's primary Focus Areas, as described in 'Legacy 2030' (see page 3).
- Projects must serve residents of Jefferson County, Indiana. BLF will consider projects located outside Jefferson County if they can show they serve Jefferson County residents. However, priority is often given to projects that are located within the county.
- Projects that include support for public amenities must be made available to the general public, not restricted to a limited group(s) (e.g. parks, schools, playgrounds, pools etc.).

BLF DOES NOT FUND

- Organizations, programs, or projects that discriminate in any way based on participation or membership in a specific religious faith, race, gender, citizenship status, sexual orientation, age, or disability.
- Lobbying or political campaigns.
- Sponsorships (BLF may consider partnerships for events that directly align with our Focus Areas. Contact us to discuss).
- Projects that use BLF grant funds to replace existing funding sources except in emergency or interim cases.
- Real estate purchases with BLF as the sole funder.
- Direct grants to individuals.

Note: Organizations designated as public charities by the IRS need to pass the public test to maintain that status. Based on this, projects where BLF grant funds account for more than 40% of the organization's total operating budget might require additional technical steps or may be declined.

LEGACY 2030 – BLF’S SIX-YEAR PLAN (2025-2030 STRATEGY)

Our six-year strategic plan aims to create a sustainable community where individuals of all ages can access the necessary resources and services to thrive. A strong workforce is the cornerstone, supported by ensuring youth, adults, and seniors have equitable access to transportation, mental health, and social services to promote well-being and independence. Our efforts and investments will focus on prevention, root causes, and initiatives that create a path to self-reliance.

The following outlines our Focus Areas, goals, and objectives for our **Community** and the **People** who live here:

Community

- We aim for a Thriving Workforce that makes Jefferson County a desirable place to live and work and attracts and retains top talent.
- To achieve this, we seek proposals, projects, and efforts that:
 - Expand access and options for quality **Childcare** to improve outcomes for families and businesses
 - Build stability through access to quality, safe and affordable **Housing**
 - Expand **Recreation** options to promote health, connections, and a high quality of life
 - Build skills and knowledge through **Professional Development*** to enhance and advance careers

People

- We aim for Strong Youth, Empowered Adults, and Stable Seniors in Jefferson County with the following outcomes if achieved:
 - Kids that have a strong foundation and build resilience
 - Adults that are healthy, educated, and productive citizens
 - Seniors that are independent and Grow Old with Love and Dignity (GOLD)
- To achieve this, we seek proposals, projects, and efforts that:
 - Build **Mental Health**** resilience and healing through holistic and preventative approaches
 - Bridge distances by increasing options and access to **Transportation**
 - Grow **Social Services***** that strengthen and empower individuals and families

***Professional Development** focuses on initiatives that strengthen our local workforce by enhancing skills and career pathways particularly in sectors critical to our region’s health and well-being. Examples include but are not limited to: training, credentialing and/or certification programs; leadership & career advancement; pipeline development and recruitment; regional collaboration and employer partnerships.

****Mental Health** also includes substance use disorders. We understand that mental health is often interconnected with substance use disorders. Due to the lack of treatment services in our county, opportunities to support new, existing, or expanding programs that will allow more people to seek recovery are particularly attractive to BLF.

*******We seek to support **Social Services** that strengthen individuals and families by equipping them with the skills, resources, and support needed to navigate challenges, recover from adversity, and maintain long-term well-being. These services may address immediate needs and/or long-term capacity-building to foster self-sufficiency and overall health.

TYPES OF GRANTS

Open Applications

BLF uses an open application process to collect and review project ideas that align with BLF Focus Areas (see page 3).

Application questions and due dates will be posted in Quarter I. There are two types of applications:

- Short Application
 - For requests of \$50,000 or less in total funding, including multi-year requests
 - Projects must support BLF Pillars and Focus Areas to be considered for funding
 - Only one application form is submitted for review
 - ~6-week process starting from application submission
- Long application
 - For requests above \$50,000 in total funding requested
 - Projects must support BLF Pillars and Focus Areas to be considered for funding, AND meet multiple Grant Priorities
 - A pre-application must be submitted and accepted before a full application can be submitted for review
 - ~12-week process starting from pre-application submission

Rapid Response Grants

BLF will consider grants that are time sensitive in nature that could not have been predicted or reasonably planned for.

Examples include:

- Local match needed to attract additional funding
- Response to a local crisis
- Funding needed by specific date to avoid potential loss
- An emergency need that would prevent an organization from carrying out its primary mission
- Swift funding would dramatically accelerate a high impact initiative/project

Challenge Grants

BLF will occasionally issue a competitive funding opportunity to address or solve a particular community challenge to advance our goals. The application would be tailored to that specific request.

Invitation Only

Occasionally, BLF will invite eligible organizations to submit a project proposal, outside of its standard application process. Organizations may be invited based on their strength of alignment to BLF's Focus Areas and goals. BLF identifies these investment opportunities through community outreach and partnership building by staff. Funding invitations are made depending on the resources available.

Operational and Unrestricted Funding

Occasionally, BLF will provide general operational or unrestricted funding grants to organizations that are critical to our Focus Areas. These flexible dollars allow the recipient organization to use the funds at their discretion, without specific limitations on how the money is spent.

GRANT PRIORITIES

Important Attributes of the Grant Proposal - Please note BLF does not fund all applications it receives. Applications found eligible for funding will also be assessed and scored using the following criteria:

Two (2) or more BLF Focus Areas

We seek proposals that demonstrate how the project/pilot has a positive impact on two or more Focus Areas i.e. *Housing, Recreation, Childcare, Professional Development, Mental Health, Transportation, Social Services* (see page 3 'Legacy 2030' for additional information).

Systems Change

We seek proposals that lead to systems change – initiatives that create lasting, structural improvements in policies, practices, or resource distribution to address the root causes of social challenges. These efforts go beyond direct services to drive long-term, sustainable impact at the community, organizational or policy level.

Prevention

We seek proposals that proactively reduce or eliminate the risk of negative social, economic, or health outcomes before they occur. Prevention efforts address root causes, strengthen protective factors, and promote long-term wellbeing for individuals, families, and the community.

Innovation

We seek proposals that focus on the development, testing, or scaling of new and creative approaches that address social challenges more effectively than existing solutions. These could include new program models, testing scalable approaches or disruptive change strategies that challenge traditional methods by introducing bold, forward-thinking solutions. We are willing to take smart risks with grantees.

Collaboration

We seek proposals that involve multiple organizations working together towards a specific goal and/or cross-sector collaboration. Effective collaboration leverages the strengths, resources, and expertise of each partner to create sustainable solutions.

Accessibility

We seek proposals that ensure programs, services, and resources are inclusive, equitable, and available to all individuals, particularly those facing barriers due to disability, language, geography, income level, or other factors. Initiatives that include accessibility remove obstacles that prevent full participation and promote equitable opportunities for engagement.

Sustainability

We seek proposals that demonstrate their ability to maintain impact, services, or benefits beyond the grant funding period. A strong sustainability plan demonstrates how the initiative will continue through diversified funding, community partnerships, community ownership, capacity building, policy integration or other long-term strategies. (Does not apply to pilot projects or one-time investments with no ongoing costs)

APPROVED GRANT REQUIREMENTS

Grant Agreement and Funding Transfer

If approved, BLF staff will typically verbally notify you and then email the following documents:

- Grant Award Letter
- Grant Agreement
- ACH Form
- BLF Approved Grant Form

The Grant Agreement and ACH form will both need to be completed and returned for grant funds to be transferred via ACH. Along with the ACH form, BLF will need a voided pre-printed check or a bank statement that shows your organization's account number and bank routing number.

For your banking account safety and security, we prefer that you submit your preprinted voided check /bank statement to us in person or via USPS. Should you still prefer to submit your bank information to us electronically, Bethany Legacy Foundation is not liable for any account security breaches.

Multi-Year Grant Funding Transfers

For multi-year grants, each year's funds are transferred in the same month as the original transfer. An ACH form and a voided pre-printed check or bank statement that shows your organization's account number and bank routing number will be required each year ahead of the funding transfer. BLF staff will use this information to ensure we have the correct account information in our system before making a repeat transfer. BLF staff will request the documents roughly 30 days before the funding transfer is scheduled.

Timeframe for Spending Grant Funds

The general expectation is that the funds awarded be used within 12 months of the date the funding is received by the Grantee. Multi-year grants are to be used within the timeframe of the grant award as specified in the agreement. Extensions may be provided to allow for reasonable delays. BLF reserves the right to request unused funds be returned or to cancel future multi-year payments, so that those funds can be reallocated into the community.

Marketing

The approval email will explain what form of marketing and communication your grant will receive. There will also be a link to the BLF Approved Grant Form which will ask you to submit your organization's logo and a quote. The information you provide in this form will be used by BLF staff in public outreach about the grant.

Grantees may share their own content, but BLF requests that all content be sent to us to review before publishing, at marketing@bethanylegacy.org.

BLF and Grantee Catch-up Conversations

Throughout the term of the grant, BLF staff will seek to meet with each grantee 2–6 times annually. These are informal conversations to discuss how the grant is going and an overall check-in with the organization. We see this as an opportunity to strengthen relationships and understand how we can more effectively support Jefferson County.

The frequency of meetings is determined by the following:

- Organizations that are completely new: 6x annually
- Established organizations that are new to BLF funding: 4x annually
- Established organizations that have previously received BLF funding: 2x annually

BLF staff may determine a different frequency of meeting would be beneficial for an individual project, based on characteristics specific to that project. Grantees may also request to meet with BLF staff at a different frequency.

BLF's preference would be to meet in the project space, so BLF staff can become more familiar with the project in-person. If that is not possible, BLF staff are always happy to meet at BLF offices or at a coffee shop.

Reporting

Each grantee is required to submit a report, generally 12 months after their grant funds are transferred. For recipients of multi-year grants, a report is required each year of the grant, generally every 12 months.

As part of the BLF Approved Grant Form, you will be asked to identify 1–5 impact measures that you plan to use to evaluate if your project is successful in meeting its goals. The Program Manager assigned to your grant will use this to set up your report form. These impact measures will be reviewed at your first 'Catch-up Conversation' with your Program Manager in case any additional edits need to be made to your reporting plan.

After a report is submitted, BLF staff will review and ask clarifying questions as needed. Once questions are addressed, the report will be accepted and considered complete.

Client Demographic Data

For projects that include serving individuals directly, BLF will seek to collect demographic information on clients served, specifically 1) age range, 2) gender and 3) race/ethnicity. It is not required that approved projects track all three (3) datapoints, but any datapoints that an organization already collects will be requested by BLF. This helps BLF track who in Jefferson County is impacted by BLF grantmaking, and who may be missed.

Leveraged Funding

BLF will request the amount of additional financial or in-kind resources that a grantee secures from other sources that complement the BLF grant funds for projects with total costs that are larger than the BLF grant request. These additional resources are referred to as "leveraged funding." Leveraged funding can include funding from other foundations, government entities, individual donors, fundraising events, matching funds, etc. It can also include funding that comes directly from the grantee. Leveraged funding does NOT include BLF's funding.

BLF asks that other funding sources are identified by name but does NOT request individual donor information; the total amount raised from individuals can be referred to as "individual donations" or "private donations."

Grant Closeout

Once the final report is accepted by BLF staff, the overall grant is considered complete and is closed out. A close-out email will be sent to the grantee for their records. No additional grant requirements must be met EXCEPT for records documenting use of funds be retained by the grantee for five (5) years after grant closeout.

While there are no further grant requirements, BLF staff may reach out requesting follow-up information on the funded project, or for marketing-related information. Grantees will also be asked to complete BLF's annual optional and confidential Grantee Survey, to give feedback on BLF's grantmaking and communication.