



Episcopal
Foundation
of Dallas

Grants Writing Tips with the Episcopal Foundation of Dallas

Presented by:

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March 9, 2023

- ❖ **Who We Are**
- ❖ **Annual Grant Program**
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Who we are...

Summary

The Episcopal Foundation of Dallas (EFD) is a separate Texas not-for profit corporation established to invest and administer the trust funds of the Episcopal Diocese of Dallas and its parishes, schools, and missions.



Mission Statement

EFD exists to strengthen and support faith communities by partnering wise investments with purposeful giving.



Founding

1950

Assets Under Management

Approximately \$45 million

Investing Organizations

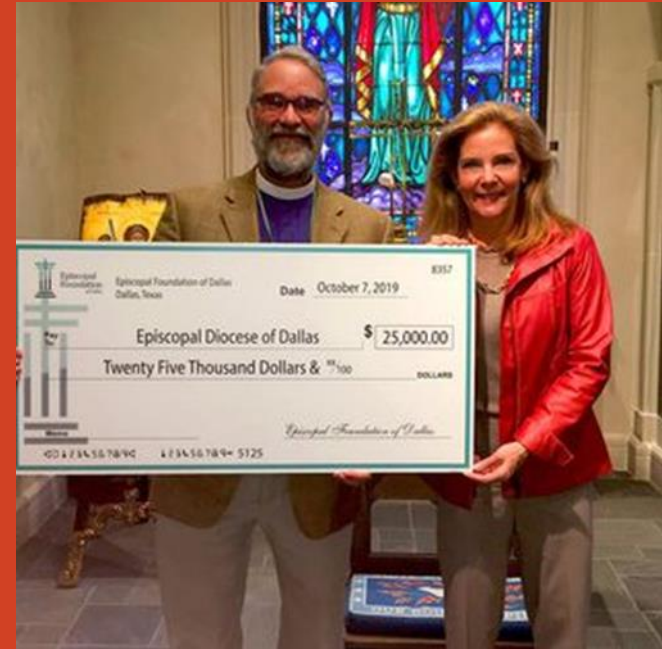
45 Investment Partner Accounts

Staff

2 part-time professional staff supported by 17 active board members



Annual Grant Program



How can the Episcopal Foundation of Dallas help?

\$11,000,000

Church and Community Grants from EFD and EHFD since 1993



Focus Grants

- ✓ One annual grant cycle
- ✓ Applications accepted February 1 – March 31
- ✓ Online application – access through EFD website
- ✓ \$500,000+ available to grant in 2023
- ✓ Open to all Diocesan entities and other not-for-profits



What we fund...

Focus Grants Funding Priorities

Supporting the *ministries* of EDOD and to meet the needs of those in *poverty* which include:

- *homelessness,*
- *food insecurity,* and
- *health insecurity*

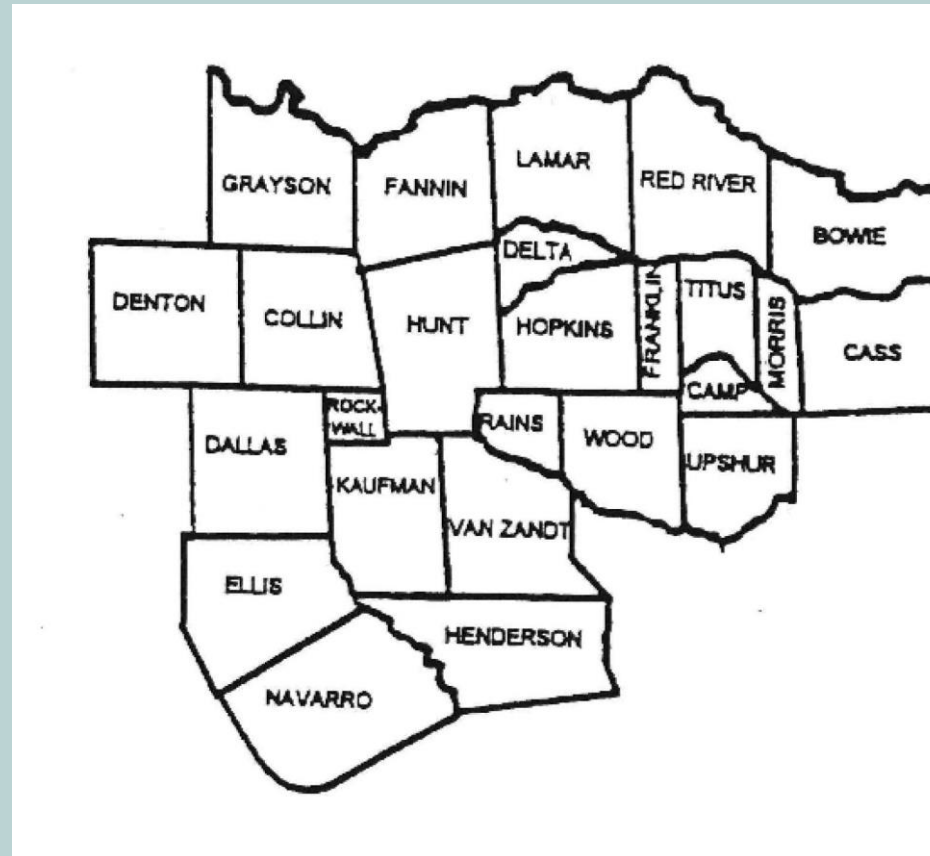


Who can apply?

- ✓ Any parish, school, mission, or program of the Episcopal Diocese of Dallas (EDOD) may apply. EDOD applicants are prioritized.
- ✓ Any other non-profit may apply, with proof of tax-exempt status.
- ✓ All applying organizations must be located and serve in the same geographic area as the EDOD.



Geographic Boundaries of The Episcopal Diocese of Dallas



What can you apply for?

- ✓ Churches, schools, missions, and programs of the EDOD may apply for almost any need.
- ✓ Other non-profits may only apply for programs or projects that address food insecurity, homelessness, poverty, or health insecurity.
- ✓ May apply for capital needs, program or project costs, seed money.



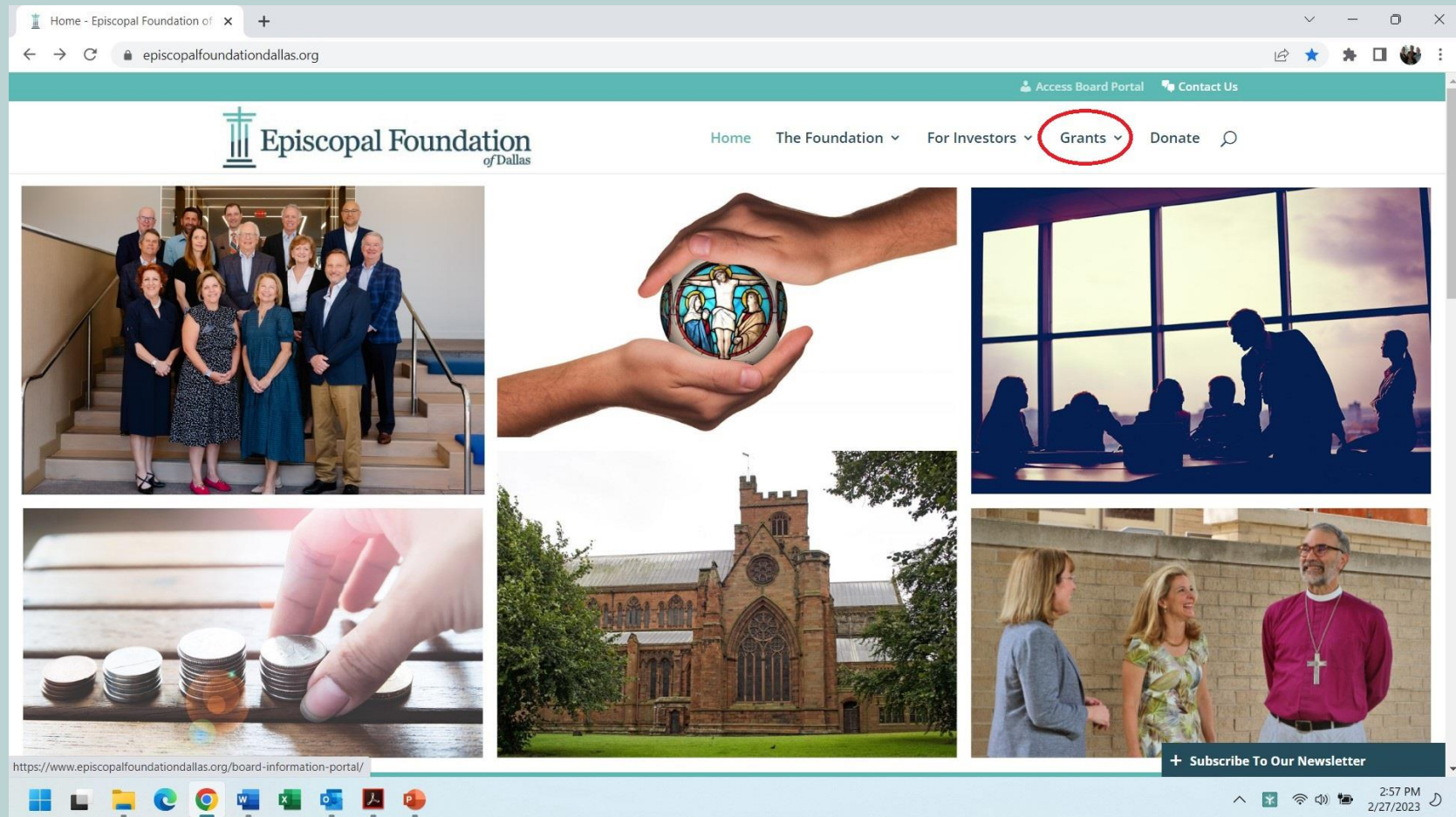
What can't you apply for?

- ❑ EFD does not make grants for annual fund campaigns, endowments, capital campaigns, deficit financing, debt repayment or underwriting for fundraising activities
- ❑ EFD does not support programs that are conducted outside the Diocese.
- ❑ Generally, EFD does not support grants that primarily benefit individuals



How to apply?

<https://www.episcopalfoundationdallas.org/>



Supporting Documents

The application requests these document uploads

- Project Budget
- Project Bids – required if you are requesting capital item(s)
- Organization Operating Budget
- Financial Statements
 - Statement of Net Assets (aka Assets & Liabilities)
 - Statement of Activities (aka Revenues & Expenses)
- Grant Report – if applicable
- Tax Exempt Letter



Supporting Documents

- All documents must be in **PDF format**.
- All budgets & financials should be annual – not partial or monthly.
- Audited financial statements not required for churches.
- Churches do not have to submit Statement of Net Assets if it is not readily available.



THE
Episcopal
CHURCH

January 26, 2018

To whom it may concern:

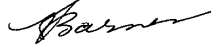
The Protestant Episcopal Church in the United States of America, also known as the Episcopal Church, whose federal tax identification number is 31-1629166, is an unincorporated association that has since the 1940s continuously enjoyed an explicit federal "group" tax-exemption under the Internal Revenue Code. The Church's status is currently reflected in its listing in the IRS Cumulative List of Tax Exempt Organizations, p. 2538 (2003 ed.) (note the Code "1" in the listing denoting group exemption).

The Church's Group Exemption Number is GEN. No. 3741.

This exemption covers the Episcopal Church and those of its "Dioceses in the U.S. and Institutions Thereof" that elect to come under the group exemption, even though the latter are not separately listed in the Cumulative List.

According to our records, the following organization is covered under this exemption:
St. Matthew's Cathedral, 5100 Ross Avenue, Dallas, TX 75206 - Diocese of Dallas -
EIN 75-0800675.

Sincerely yours,



N. Kurt Barnes
Treasurer

The Domestic and Foreign Missionary Society of the Protestant Episcopal Church in the United States of America
ESTABLISHED 1821 INCORPORATED 1846
815 Second Avenue ~ New York, New York 10017 ~ 800.334.7626 or 212.716.6000 ~ episcopalchurch.org



This is the preferred Tax Exempt Letter for churches. Our auditors expect us to obtain these as part of the grant application process.

Contact Susan Mills at smills@edod.org and she can request it from New York for you.

This is not a Sales Tax Exemption form.

If you are a church and have not yet obtained the letter from New York, we will still accept your application.



Successful Grant Applications

- ✓ **Request a reasonable amount.**
 - ✓ 2022 grants awarded ranged from \$4,500 to \$25,000. Avg. ~ \$10,000.
 - ✓ Red flag when applicant requests 100% of project budget.
 - ✓ Gold star for evidence of parish support via funds raised, volunteer labor, planning for future.



Successful Grant Applications

- ✓ **Tell a “story” and pull us in.**
 - ✓ Tout your church’s community outreach and vitality.
 - ✓ Be clear/provide detail when describing need and impact.
- ✓ **Document planning and budgeting.**
 - ✓ Provide outside bids for significant equipment/building requests. Online pricing may suffice for smaller requests.
 - ✓ Describe plans for continued funding.



Successful Grant Applications

- ✓ **Engage the community – inside and outside the church**
 - ✓ Gold star for community partnerships, leveraged impact.



Tips for your application

- Apply early.
- Have all the required documents gathered before you begin.
- When setting up your Organization Information, be sure the Contact listed includes a good email address that will be monitored for follow-up requests.
- Answer all questions.



Tips for your application

- For narrative sections, do not feel you have to use ALL the space provided. Be descriptive, clear, and concise.
- Be realistic when designing a project
- If your organization received a grant from EFD in the past year, be sure that a Grant Report is filed.
- Be responsive to requests for additional information.



- ✓ **Grant Application opens:**
February 1 and closes on March 31
- ✓ **Online application on our website:**
www.episcopalfoundationdallas.org



Other Resources

- 1) The Only Grant-Writing Book You'll Ever Need*
- 2) The Complete Book of Grant Writing: Learn to Write Grants Like a Professional*
- 3) Winning Grants Step by Step: The Complete Workbook for Planning, Developing and Writing Successful Proposals*



Questions?



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