



## Grant Policy and Guidelines

The Portage Health Foundation's (PHF) mission is to positively influence a healthier community through enhanced philanthropy and collaboration. In order to fulfill this mission, PHF has identified seven areas of targeted emphasis addressing the following (in no order of importance or preference):

1. Increase access to education;
2. mitigate poverty;
3. reduce hunger and poor nutrition;
4. build safer communities;
5. provide access to support healthy living;
6. support medical research and innovation;
7. improve physical, mental, emotional and spiritual health and well-being

These identified focus areas are used to define and establish giving priorities, programming initiatives, and to help identify grant project criteria that ensures our service area's (Baraga, Houghton, Keweenaw and Ontonagon Counties) success in addressing health risks.

Grant Applications are accepted under the following:

1. For a specific Request for Proposal (RFP) basis
  - All applications must meet the criteria stated in the RFP and be received by the application deadline date.
  - No late applications will be accepted.
2. Non-RFP applications can be submitted at any time.
  - PHF funding will depend on resources available and alignment with PHF goals.

PHF utilizes a letter of inquiry (LOI) and a grant application. Although the submission of an LOI is not mandatory, the submission of one is strongly suggested. **All requests for funding must utilize the grant application form.** For more information regarding completing a grant application, please visit our Frequently Asked Questions (FAQ) and grant requests pages on our website: [www.phfgive.org](http://www.phfgive.org).

### Eligibility

To be eligible to apply for a PHF grant or other means of financial support, the applicant must:

- Be recognized by the Internal Revenue Service as a 501(c)(3) non-profit organization; a local unit of government; or a public institution of education; (Note: Applicants must be current with their IRS tax exempt organization determination and have a current License to Solicit Charitable\* Contributions as required, unless exempt under MCL 400.283.)

- Be domiciled\*\* in Baraga, Houghton, Keweenaw, and/or Ontonagon counties in Michigan and serve the citizens of the same;
- Have filed their most recent 990, 990-EZ or 990-N filing;
- Have a certified financial audit or reviewed financial statements as required by state law; (Note: for all nonprofits with annual gross receipts of \$250K or less PHF requests CPA prepared compiled financial statements for their most recently completed fiscal year);
- Have adequate and demonstrated organizational capacity to successfully execute the proposed grant, including all reporting requirements and;

### **Application Evaluation Criteria**

The Portage Health Foundation will evaluate each application on the following criteria:

1. Does the proposal have goals/objectives that advance PHF's mission?
2. Does the proposal identify an unmet community need/health risk?
3. Does the proposal have measurable goals and objectives?
4. Does the proposal have a budget that identifies and covers all necessary expenditures?
5. Does the proposal identify a plan for sustainability?
6. Is there potential to achieve significant long-term impact by implementing effective models or supporting needed innovation;
7. Does the proposal demonstrate the use of industry standards, best practices, or science-based methodologies as appropriate;
8. Does the proposal demonstrate collaboration, including leveraging other resources; and
9. Does the proposal have the potential to be replicated in other settings, including opportunities for learning, knowledge dissemination, and to inform public-policy?

### **Additional Considerations:**

#### Multi-Year Requests

As a matter of practice, in order to provide the greatest immediate impact and to respond to current needs, multi-year requests are generally not accepted. If you are making a multi-year request, please contact the PHF office prior to submission of your LOI and/or application.

#### Multiple Submissions

Organizations may submit more than one grant proposal under a single RFP grant solicitation period; however, each proposal must be for a different project/program.

### **Applications for the following are excluded from Grant Funding Consideration**

- Repayment or securing loans;
- Activities supporting religious organizations for religious purposes;
- Activities supporting political organizations for political purposes;
- Organizations that practice exclusivity based on race, color, religion, sexual orientation, gender, national origin, age, marital or veteran status;
- Proposals in which granted-funds will be used to maintain existing program(s) or solely fill a budget-gap for current services, and;
- For-profit businesses.

If you have additional questions or need more information, please email [info@phfgive.org](mailto:info@phfgive.org) or contact our office at (906) 523-5920.

\*The following are organizations that are exempt from the charitable solicitation registration requirements:

- Organizations that received less than \$25,000 in 12 months and pay no individuals for fundraising services of any kind
- Solicitations that are exclusively for the benefit of a named individual, so long as the individual is specified in the solicitation and no one is compensated for fundraising services
- Churches and religious organizations
- Governmental entities
- Michigan educational institutions
- Veterans' organizations that are chartered by the U. S. Congress
- Licensed Michigan hospitals and their foundations and auxiliaries
- Private foundations that receive contributions only from the members, directors, incorporators, or members of the families of those individuals
- Organizations that are licensed by the Michigan Department of Human Services to serve children and families, such as day care facilities
- Organizations whose sole source of funding is another charitable organization that is registered to solicit, so long as its registration is current

If your organization does not fall under one of these exemptions, then a solicitation form is required. If the organization has never registered before, then an [Initial Solicitation Form](#), with attachments, must be filed. There is no fee to register. For faster processing, the Charitable Trust Section accepts registrations by email or e-filing. If your organization has already filed an initial form, then an annual [Renewal Solicitation Form](#) should be filed.

\*\*Domiciled – Nonprofit address (main office/headquarters) must be registered in our service region.