



## Charis Fund Executive Summary Submission Guide

The Charis Fund is a small private foundation with 11 volunteer trustees. We have a limited amount of annual funding and in recent years have seen requests for grants increase far beyond our funding capabilities. At the same time, the dollars given do not go as far as they used to. Because we have limited funds, the Charis Fund limits the number of grant requests considered to 50 in Spring and 50 in Fall.

In the hopes of a more equitable process, we have set-up a **2-part** process. First Part is submission of a single page executive summary (more details below). Charis Fund will accept these requests twice a year, mid-January and mid-July (exact dates and times to be posted on the website [www.CharisFund.org](http://www.CharisFund.org)) for **only a two-hour period of time**. We will not limit how many groups can submit in that 2-hour time period. Charis Fund Trustees will then review the summaries and select 50 groups that will receive instructions for submitting more extensive grant requests in the second phase of the process.

Charis fund has the following grant guidelines:

- Charis Fund's goal is to **help initiate or expand programs** focused on the areas of
  - Housing/homelessness
  - Food insecurity/ feeding programs
  - At-risk youth/education
  - Mental health/health Care
  - Domestic violence
  - Substance Abuse
- Funding is available only to 501(c)(3) organizations residing within California, Oregon, Nevada and Washington State. For nationally based groups, any request must come from the local organization located within those states, with funds used there.
- Organizations are eligible to receive funds **once every 3 years** and this applies retroactively. For example, if you received funding in Fall of 2022, please wait to reapply until Fall of 2025 or later.
- An organization that has received more than \$30,000 from Charis Fund will need to take a **5-year break** before requesting more funding.

Following are more details regarding the first phase of the new process for requesting a grant:

- Organizations are asked to prepare a **single page** executive summary PDF with the following information:
  - Name, address and website of organization
  - Amount of funding requested (not more than \$7,500)
  - A short, 2-3 paragraph summary with some information about your organization but more importantly, the project or programs for which funding is requested.
- Your organization's name must be on the summary and in the name of the PDF.

- Submission will be via portals on the website. Two portals, one for **NEW AGENCIES**, those which have never received funding from Charis Fund, and a second for **RETURNING AGENCIES**, those which have previously received funding.
- When submitting the single page executive summary PDF via the portals, there will be a series of brief information questions:
  - Name and address of organization
  - Name/phone/email information for the person in charge of the request
  - Dollar amount of request
  - Area of focus for the funding (selected via multiple choice)
  - If previously funded by Charis Fund, the date and amount of that funding.
- All submitting groups must read and understand our statement of equity and inclusion shown on our website here: <https://www.charisfund.org/about-us>

Second phase of grant request cycle:

- After the submission period closes, the Charis Fund trustees will review the executive summaries and select 50 groups that will be given a link to submit a more in-depth grant proposal. Complete instructions will be provided for grant submissions and at least one month will be allowed for grant preparation.
- Grant requests will provide more details about your organization and the project for which funds are being requested.
- We will also require both total agency and program budget information, 501(c)(3) status, and a Board of Directors list.
- A phone call or site visit from a Charis Fund Trustee is also likely during this phase.