Fred A. and Barbara M. Erb Family Foundation
Grant Application Process

LETTER OF INQUIRY

We recommend potential grantees begin by having a conversation with a Program Officer. Use this link to contact a Program Officer.

A Letter of Inquiry must be submitted online using this link. If you are a first-time applicant, you will need to create an account. You will be prompted to enter your organization's tax ID number, then answer the following questions to determine eligibility:

- Does your project align with the Foundation's Mission and Desired Outcomes?
- Are you requesting a grant of at least $10,000?
- Did your organization have total revenues of at least $100,000 for the preceding year?
- Does your organization have a current financial audit conducted by an independent certified public accountant?
- Does your organization have a policy and practice not to discriminate based on age, race, creed, gender, religion, disability, gender identity, sexual orientation, and ethnicity?

If you do not meet these criteria, please contact a Program Officer.

The LOI form includes the following sections:

Organizational Information
- **Organization Name** - Your legal name will be automatically entered from the IRS database based on your tax ID number. You may change this here to the name you are currently using if it is different.
- **Legal Name** - This will be automatically filled in based on your tax ID number.
- **Organization Address, Phone Number and E-mail**
- **Tax ID –** This will be automatically filled in.
- **Organizational Description** - Please include your mission statement, briefly describe your major goals and activities, and include the number of employees. (Word limit = 250)
- **Annual Budget** - Projected organizational expenditures for the year in which your grant would begin.

Contact Information for CEO, Board Chair & Project Contact
- Name, Title, Phone, and E-Mail

Project Information
- **Project Title** - Provide a short title for your project.
- **Purpose of Project/Request** - Describe the purpose of your project or request in about 5-15 words.
- **Estimated Total Budget for the Project.**
- **Estimated Total Amount Requested** - Include the total amount being requested over the entire grant period.
- **Grant Period** – Include anticipated project start and end dates and length in months.

Need for Project
- What problem or opportunity does this project address? (word limit = 150)

Project Goals
- What results are you trying to achieve? You may have up to five goals. Please list each goal in a separate field.
    - Goal 1 (word limit = 50)
    - Goal 2 (word limit = 50)
    - Goal 3 (word limit = 50)
    - Goal 4 (word limit = 50)
    - Goal 5 (word limit = 50)
- What activities will you do to meet your goals? (word limit = 150)

Required Attachments (.pdfs)
- Audited financial statement
- Board list

You will be notified within four weeks as to whether the Foundation will invite a full proposal.

Please do not send any application materials via mail or email.

PROPOSAL – NEW GRANTS

If you are invited to submit a proposal, please submit it online using the link provided in the invitation email. Paper and emailed proposals will not be accepted.

The proposal should follow the format listed below and not exceed ten pages. Alternatively, if you have submitted a proposal for the same project to another foundation, you may use that format.

Proposal Narrative Format (limit 10 pages)

These items will be requested. If you submitted an LOI, they will be pre-populated:
- Organization Name
- Organization Description
- Project Title
- Purpose of Project/Request
- Estimated Total Budget for the Project
- Amount Requested
- Grant Period (and length in months)

Please address the following topics in your Proposal Narrative, which should be submitted as a .pdf.

- **Need** –What problem or opportunity does this project address?
- **Project Goals** – What results are you trying to achieve? How does your work help advance the Foundation's desired outcomes? *(See below for desired outcomes for each program area.)* What activities will you do to meet your goals?
    - *Great Lakes*

- **Stewardship:** *A healthy Great Lakes, evidenced by increased stewardship and improved waterquality in the Bayfield, Clinton, Detroit, Huron, Raisin, and Rouge watersheds.*
- **Agricultural Runoff:** *To improve the health of the western basin of Lake Erie by reducing phosphorus from runoff and subsurface drainage from agricultural fields. We aim for a 50 percentreduction from the 2008 baseline loading levels by 2025.*
- **Urban Runoff**: *to reduce urban runoff to improve water quality of southeast Michigan rivers and the Great Lakes.*

- *Environmental Health & Justice*
  - **Lead:** *A reduction in elevated blood lead levels in children in Detroit and Wayne County by reducing lead hazards in housing and soil.*
  - **Asthma:** *A reduction in incidents of asthma in Detroit and Wayne County through improved ambient air quality.*

- *Sustainable Business*
  - **Sustainable Business:** *Southeast Michigan is a national leader in sustainable business, and the regional business community is collaboratively engaged in a flourishing and just economy, society,and environment.*

- *Arts*
  - **Anchor Arts:** *A culturally vibrant metro Detroit, evidenced by healthy organizations and a coordinated sector.*
  - **Jazz Education:** *To continue Detroit's strong jazz tradition and Fred Erb's legacy of jazz patronage by educating the next generation of jazz musicians.*

- **Alzheimer's Research:** *Improved prevention, management, and treatment of Alzheimer's Disease and related dementias.*

- **Coordination with Others** – How is your project similar or complementary to other projects and efforts? How will you work together with other partners?
- **Community Engagement** - How will you involve residents of impacted communities and your Board in project planning, leadership and implementation? How do you involve the community in organization governance?
- **Barriers and Risks** – What barriers and risks do you expect to encounter during the project? How will you address them?
- **Evaluation and Learning** – What are the deliverables for this project? How will you track and measure your progress? How will you use and share what you learn? If you have evaluations or results from previous related projects, please share.
- **Continued Financial Support** – The Foundation generally funds projects for a limited, defined period. What other funding sources do you expect to have for this project, both during the grant and after the grant?

Attachments – Please submit as .pdfs. Attachments do not count towards the page limit. Please do not send application materials by mail or email.

- **Project budget** – use your own budget format or [this template](#) from the Foundation. If more than one year of funding is requested, please submit a proposed budget for each year.
- **Organization's operating budget for current and upcoming year** – include detailed expenses and revenue. Please make sure to itemize significant revenue sources, including a list of foundations, corporations, government grants, and earned income.

- **Optional supplemental materials** – If desired, you can share evaluation reports, articles, photographs, or other materials that will help us better understand the project.

POST GRANT AWARD REQUIREMENTS AND REPORTING

All grantees will be required to sign a Grant Agreement Letter, which will outline the reporting requirements for the grant. Your Program Officer will schedule a phone/videoconference check-in after 6 months.

The Foundation's reporting process is designed to understand the project's activities and spending, assess the impact achieved, and promote ongoing learning. We encourage regular, ongoing communication between grantees and Program Officers to share project progress, explore learnings, and troubleshoot any issues.

If you have been awarded a multiyear grant, you will submit a narrative and financial Progress Report each year answering the questions below. **The report should be cumulative**, covering the entire period since the grant began. This report will be submitted online as a .pdf. Future payments are authorized annually with board approval.

A final narrative and financial report is due two months after the conclusion of the grant. The final report should be submitted as a .pdf and should cover the questions below.

Narrative Report – For multiyear progress reports and final reports
- **Project Goals** – What activities did you conduct? What results have you achieved thus far? What impact do you expect to see in the future?
- **Coordination with Others** – How did you work together with partners?
- **Community Engagement** – How did you engage residents of impacted communities and your Board in this project?
- **Barriers and Risks** – What barriers and risks did you encounter during the project? What changes, if any, did you make to the project and why?
- **Evaluation and Learning** – What did you learn through doing this project, and how did you learn it? How will/did you use and share what you have learned? Please include link or references to publicity and other materials regarding the project that would be helpful in improving our understanding of the project and/or that include recognition of the Foundation.
- **Continued Financial Support** – If applicable, what progress have you made on securing additional and ongoing funding for the project?

Financial Report—For multiyear progress reports and final reports
- List actual project expenditures and revenue against the original budget submitted with your proposal, showing variances if any.
- Financial audit

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