



Giving Indiana Funds for Tomorrow

Phase IX

PROPOSAL GUIDELINES

October 2025

Lilly Endowment is pleased to announce the ninth phase of its Giving Indiana Funds for Tomorrow (GIFT IX) community foundation initiative. This initiative builds upon the Endowment's longstanding belief in community foundations' unique ability to play central roles in supporting and strengthening communities throughout Indiana.

GIFT IX Overview and Aims

The Endowment has allocated **up to \$271.5 million** for this initiative, which aims to support Indiana's community foundations in their efforts to strengthen their capacity to respond to local challenges and opportunities, both now and in the future. Eligible community foundations and affiliate funds (both hereafter referred to as "community foundations") may request grants through the following two funding opportunities:

1. **Community Support Grants** totaling up to \$135.75 million will help community foundations support in the near-term projects, programs or initiatives that address local needs or enhance the quality of life in their communities. Eligible community foundations may submit proposals requesting grants ranging from **\$750,000 to \$15 million** based on the population of the counties they serve. Community Support Grant proposals must be submitted **by noon (ET) on Thursday, November 6, 2025**. Learn more about Community Support Grants on pages 4-7.
2. **Matching Grants** totaling up to \$135.75 million will help community foundations develop unrestricted assets and support projects and programs that address community needs. Eligible community foundations may submit proposals requesting grants ranging from **\$750,000 to \$15 million** based on the population of the counties they serve. Matching Grant proposals must be submitted **by noon (ET) on Tuesday, June 30, 2026**. Learn more about Matching Grants on pages 8-10.

GIFT IX Information Sessions: The Endowment will host two virtual information sessions to provide an overview of GIFT IX's aims and grant components. Community foundation staff and board members wishing to attend one of these sessions (dates and times listed below) must register via the [Endowment's website](#).

- Thursday, October 9, 2025, at 10 a.m. (ET)
- Friday, October 10, 2025, at 10 a.m. (ET)

Background information, proposal guidelines and eligibility requirements, among other matters, are discussed more fully below.

Background

In 1990, Lilly Endowment launched the Giving Indiana Funds for Tomorrow (GIFT) initiative to help establish and further develop community foundations throughout Indiana. The Endowment hoped that Indiana's community foundations could work with local stakeholders and residents to imagine and inspire a more prosperous future for their communities and support efforts to enhance the local quality of life.

Looking back on 35 years of GIFT, the Endowment has been encouraged by the progress Indiana community foundations have made in establishing themselves as trusted institutions within their respective communities. When GIFT began, there were fewer than 12 community foundations in the state with assets totaling approximately \$100 million. Today, a community foundation or affiliate fund serves every county in Indiana, and combined assets for community foundations that have regularly participated in GIFT have grown to approximately \$5.4 billion as of the end of 2024. Community foundations are playing increasingly important leadership roles across the state, working with local and regional partners to address community priorities, including by actively participating in statewide initiatives such as Indiana Economic Development Corporation's Regional Economic Acceleration and Development Initiative (READI) and the Endowment's College and Community Collaboration (CCC) initiative, among others.

Addressing the challenges and opportunities that many Indiana communities face requires sustained, highly collaborative action among public, private and nonprofit stakeholders at the local level. Community foundations are uniquely positioned to lead efforts that imagine and inspire a more prosperous future for all residents of their communities; convene and engage a wide range of stakeholders to address local challenges and opportunities; and initiate and sustain efforts to enhance the local quality of life with a long-term focus beyond a single program or initiative.

The most recent phases of the GIFT initiative – phases VII and VIII – included several funding opportunities to help community foundations enhance their effectiveness as community leaders, including planning and implementation grants that supported community foundations' engagement of various stakeholders in their communities; assessments of their communities' highest priority challenges and opportunities; and the development and implementation of projects, programs and initiatives to address local priorities. GIFT VII and VIII also included a matching grant component to help community foundations build their unrestricted endowment assets, which are critical to community foundations' capacity to address their communities' needs over the long-term. They also included a board engagement grant component that reinforced the critical role that community foundation board members play in helping to guide the direction, assess the impact and grow the resources of a community foundation.

The components of GIFT VII and VIII were designed to support community foundations in developing their internal leadership capacity and securing the resources to enable them to work with their communities to prioritize and respond to local challenges and opportunities. Community foundations across the state are currently supporting multi-faceted efforts to address community-driven priorities related to trails and outdoor recreation, early childhood education and development, neighborhood and downtown revitalization, mental health and substance use disorder, and social services, among others.

Building Capacity to Address Immediate and Long-Term Community Needs

While community foundations' work is positively impacting communities and people across Indiana, the state continues to grapple with significant needs, including a shortage of high-quality and affordable early

childhood development and education programs; increased mental health needs; persistent and growing food insecurity; lagging educational attainment rates; a scarcity of housing, particularly for individuals from low-income households; and increased demand for recreational opportunities and amenities that help communities attract and retain residents, among other priorities. Furthermore, changes in federal and state policy and funding are expected to generate additional headwinds for communities working to address these and other priorities.

In response to these challenges and opportunities, community foundations have demonstrated a continued commitment to leading and investing in local efforts that address community needs. GIFT IX is intended to amplify these efforts and strengthen community foundations' capacity to address local challenges and opportunities, both now and in the future. Accordingly, the Endowment, as stated above, has allocated up to \$271.5 million for GIFT IX, which comprises the following two grant opportunities: 1) Community Support Grants totaling up to \$135.75 million; and 2) Matching Grants totaling up to \$135.75 million. Together, these funding components are meant to enhance community foundations' grantmaking capacity to address near-term community needs while further developing the unrestricted endowment assets needed for them to be community leaders for years to come.

Community Support Grants

GIFT IX's Community Support Grant component is meant to provide flexible funding to enhance each community foundation's grantmaking capacity to address in the manner it sees fit compelling, near-term needs in its county.

Guiding Questions and Priorities

In determining whether and how to participate in the Community Support Grant component of GIFT IX, community foundations should consider the following guiding questions:

- What are your community's most pressing and compelling challenges and opportunities? What does your foundation and/or community need to better understand these priorities and how to address them? For example, have your community foundation and/or local stakeholders and collaborators considered how changes in governmental funding will impact local needs and/or the nonprofit organizations working to address them?
- Has your community foundation sought input from a broad group of community stakeholders from throughout the county it serves to consider a wide range of community priorities?
- How can your community address its highest priority challenges and opportunities? Are there certain organizations, projects, programs or initiatives whose efforts would benefit from your community foundation's financial support to further enhance your community's quality of life and place?
- How can your community foundation's grantmaking resources complement other funding sources (e.g., private foundations, United Ways, local government, businesses) to strengthen efforts to enhance the local quality of life?
- How can your community foundation play a meaningful leadership role in addressing local challenges and opportunities?
- What is your community foundation's current grantmaking capacity? What, if anything, does your community foundation need to do to enhance its grantmaking capacity to address local needs?

For GIFT IX's Community Support Grant component, the Endowment has allocated up to \$135.75 million for eligible community foundations to use in addressing local challenges and opportunities in their counties. Each eligible community foundation may submit a Community Support Grant proposal describing how it will develop and implement a regranting strategy that best addresses the county's local needs and context. Grant amounts available to community foundations will be determined based on the populations of the counties they serve according to [STATS Indiana's 2024 population estimates](#), as follows:

Up to 50,000 population	(64 counties)	\$750,000
50,001 - 100,000 population	(11 counties)	\$1,500,000
100,001 - 150,000 population	(6 counties)	\$2,250,000
150,001 - 200,000 population	(5 counties)	\$3,000,000
200,001 - 250,000 population	(1 county)	\$3,750,000
250,001 - 300,000 population	(1 county)	\$4,500,000

300,001 - 400,000 population	(2 counties)	\$6,000,000
400,001 - 550,000 population	(1 county)	\$7,500,000
Above 550,000 population	(1 county)	\$15,000,000

Each community foundation will have broad discretion in determining: 1) how funds from its Community Support Grant are distributed to nonprofit organizations; and 2) the community priorities and grant activities supported by Community Support Grant funds. For example, a community foundation may choose to use its grant to augment the pool of funding for its existing grant programs. Another community foundation may elect to establish a new grant opportunity (either open or invitation) for nonprofit organizations in its community. Still others may choose to allocate all or a portion of their Community Support Grant funds to support specific initiatives, projects or programs, including those developed during previous GIFT phases.

Community foundations should consider a broad range of community priorities to address through this funding opportunity. Potential areas of focus that could be considered include, among others:

- Early childhood development
- Education
- Social and human services
- Food insecurity
- Affordable housing
- Economic and workforce development
- Recreational amenities and programs
- Arts and culture
- Mental health and substance use disorder
- Youth programs

The Endowment anticipates Community Support Grants will be used to support a variety of organizations, programs, projects or initiatives that address local priorities. Grant funding can be used to support nonprofit organizations' operations, programs, capital projects and capacity building needs, among other uses. Funds can also be used to help local nonprofit organizations adapt to changes in federal and state funding. This may include helping organizations establish shared back-office services, engage fundraising consultants, collaborate or merge with other entities, or sunset their operations.

While these grants are not subject to matching or other special conditions, funds must be fully deployed during a grant period of up to three (3) years to support community priorities. A community foundation may not endow or hold back any portion of its Community Support Grant beyond the end of the grant period.

Administrative Expenses: Each community foundation will be permitted to use **up to 15 percent** of the requested grant amount for reasonable and appropriate expenses associated with administering Community Support Grants. Such costs might include staffing, technology, marketing materials, supplies, meeting expenses or consulting costs, among others. Eligible expenses also could include planning or community engagement activities (e.g., stakeholder convenings, community surveys, data analysis, feasibility studies, consultants) that inform the development of a community foundation's regranting strategy.

Community Support Grant Proposals

The Endowment encourages each community foundation to take time to thoughtfully discern the best way(s) that it can utilize the Community Support Grant funding opportunity to help address community priorities. As such, a community foundation is not expected to have full clarity on how it will deploy its Community Support Grant when it submits its proposal, which should include the following information organized in the order listed below.

Cover Letter: This is a **one-page** letter signed by the community foundation's executive staff leader confirming the foundation's intent to apply for a Community Support Grant and the amount being requested.

Proposal Narrative: This is a narrative description (**no more than five (5) pages**) describing what the community foundation currently identifies as its community's highest priority challenges and opportunities and its initial thoughts on ways that it might deploy its Community Support Grant. The narrative should include the following elements:

- **Community Challenges and Opportunities:** A summary of the community foundation's current understanding of its community's most pressing challenges and/or promising opportunities. This should include descriptions of any work the community foundation has undertaken and/or participated in to better understand or address the challenges and opportunities facing its community. This can include its work through initiatives such as READI, CCC or GIFT, as well as its general grantmaking and community development efforts.
- **Current Grantmaking Practices:** A description of the community foundation's current grantmaking practices. This should include, among other items, a summary of the community foundation's current grantmaking guidelines and funding opportunities it makes available to local nonprofit organizations; the types of grant support awarded (e.g., operating support, programmatic support, capital support); a description of the community foundation's processes for reviewing and approving various types of proposals; and information about how the community foundation evaluates and assesses the impact of its grants.
- **Regranting Strategy Development:** A description of the process the community foundation will use to develop its regranting strategy. While the community foundation does not need to have full clarity for how it will deploy grant funding (i.e., specific projects, programs or community priorities do not need to be identified), the proposal should demonstrate that the community foundation has formulated an intentional process that will support the development of a regranting strategy that is responsive to its community's context and needs. This should include:
 - A description of how the community foundation will identify and define the community priorities its regranting strategy seeks to address. This could include, among other activities, revisiting planning or implementation efforts completed through initiatives such READI, CCC or GIFT, among others, or undertaking additional community planning activities through the Community Support Grant funding opportunity.
 - A description of how the community foundation plans to gather input from a wide range of local stakeholders in its county to inform its administration and deployment of its Community Support Grant. This should include a summary of the potential stakeholders the community foundation may engage in developing its regranting strategy.
 - A description of how the community foundation will deepen its understanding of the work being done by other local organizations – including United Ways, private foundations, local government and businesses, among others – so that its regranting strategy is complementary to existing efforts to enhance the local quality of life.
 - A description of the process that the community foundation will use to develop its regranting guidelines and parameters (e.g., grantee eligibility requirements, eligible grant amounts, open versus invitational grants, competitive versus non-competitive grants, grantee reporting requirements).

- › A description of the community foundation's personnel (e.g., executive staff leader, board members, staff) who will be involved in developing the foundation's regranting strategy and their respective responsibilities in that process (e.g., grant approval, grant monitoring and evaluation).
- **Community Foundation Leadership Role:** A description of how the community foundation intends to play a meaningful leadership role through the Community Support Grant component of GIFT IX. This could include, among other topics, how the community foundation will engage with local nonprofit organizations, government or other community stakeholders to support local strategies that address community challenges and opportunities.

Letter of Support from the Board of Directors: This is a letter of support signed by the chair of the community foundation's board of directors affirming the commitment of the board to oversee the deployment of these grant funds. If the proposal is submitted on behalf of a county affiliate fund, the letter of support also should be signed by the county advisory board's chair.

Budget: This is a **one-page**, line-item budget that accounts for how a community foundation intends to allocate its Community Support Grant between 1) regranting efforts to support community projects, programs or initiatives that address local priorities; and 2) administrative and/or planning expenses. The budget should be submitted within the proposal's PDF file as well as in a separate Excel file.

- The budget should detail the community foundation's early thoughts about how it plans to deploy its Community Support Grant between regranting efforts to address local priorities and administrative and/or planning expenses (not to exceed 15 percent of the requested grant amount).
- At this stage, the community foundation does not need to have full clarity on how it intends to allocate its grant between regranting efforts and administrative and/or planning expenses. However, during the grant period, each grantee will be required to submit reports describing how grant funds were used according to the provisions of the grant agreement.

Public Support Worksheet: This is a community foundation's most recent public support calculation. The information required to make this calculation can be found on Schedule A of the community foundation's Form 990 and should be completed using the Excel form titled "Public Support Worksheet," available on the [Endowment's website](#). This should be submitted as a separate Excel file.

Community Support Grant Submission Guidelines

Each eligible community foundation should submit its Community Support Grant proposal, which includes the cover letter signed by the foundation's executive staff leader, **by noon (ET) on Thursday, November 6, 2025**. Proposals must be submitted through the [Endowment's website](#) as a single PDF with Excel copies of the budget and public support worksheet. See Appendix 1 on page 12 for the Community Support Grant Submission Checklist.

Matching Grants

In GIFT IX, each eligible Indiana community foundation will be able to apply for a Matching Grant in an amount dependent on the population of its county according to [STATS Indiana's 2024 population estimates](#).

Please note that under GIFTVIII matching guidelines, the Endowment stipulated that any matching requirement not satisfactorily met by a community foundation would result in a reduction of funding in the amount of the unmet match for future GIFT phases. Accordingly, each community foundation that does not fulfill its matching requirement as of the end of GIFT VIII's matching period (October 1, 2023, through December 31, 2025) will have its GIFT IX matching grant reduced by the amount of the respective unmet GIFT VIII match.

The Endowment has allocated up to \$135.75 million for GIFT IX Matching Grants. Grant amounts for which community foundations are eligible will be based on county size as follows (reduced by unmet GIFT VIII matches):

Up to 50,000 population	(64 counties)	\$750,000
50,001 - 100,000 population	(11 counties)	\$1,500,000
100,001 - 150,000 population	(6 counties)	\$2,250,000
150,001 - 200,000 population	(5 counties)	\$3,000,000
200,001 - 250,000 population	(1 county)	\$3,750,000
250,001 - 300,000 population	(1 county)	\$4,500,000
300,001 - 400,000 population	(2 counties)	\$6,000,000
400,001 - 550,000 population	(1 county)	\$7,500,000
Above 550,000 population	(1 county)	\$15,000,000

The strategic focus of this component of GIFT IX is to support the continued growth of unrestricted endowment assets, which can be strategically and flexibly deployed by community foundations. Unrestricted endowment assets are essential for community foundations to be long-term contributors and leaders in their communities, and the Endowment recognizes that such assets can be difficult to raise.

As in GIFT VIII, community foundations also will have an option to direct some portion of their matching grants to support specific projects and programs. Accordingly, GIFT IX includes the following two matching options:

- 1. Unrestricted Endowment Building (UEB):** Each community foundation must allocate between 60 to 100 percent of its eligible Matching Grant for the UEB option. The amount not used for the UEB option, if any, may be used for the Community Project and/or Program option described below. The matching funds raised for the UEB option must be invested, along with the corresponding Matching Grant from the Endowment, in the community foundation's unrestricted endowment fund. To incentivize unrestricted endowment building, amounts raised by a community foundation under this option will be subject to a \$2(grantor)-for-\$1(grantee) matching condition.
- 2. Community Project and/or Program (CPP):** A community foundation may choose to allocate no more than 40 percent of its eligible Matching Grant for the CPP option. Matching funds raised through this option may be used to support a variety of local projects and/or programs, including those initiated during previous GIFT phases, that address community challenges and opportunities.

To qualify for a Matching Grant under this option, the community foundation must raise matching funds designated for these projects and/or programs. Under this option, both the Matching Grant from the Endowment and matching funds raised from other sources must be used for the same projects and/or programs. Funds raised under this option are subject to a \$1(grantor)-for-\$1(grantee) matching condition.

While community foundations applying for a GIFT IX Matching Grant will have broad discretion to determine which projects and programs to fund through the CPP option, the Endowment reserves the right to approve such projects and programs.

Matching Grant Proposals

Before submitting a matching grant proposal, the Endowment encourages each community foundation to reflect on its recent fundraising efforts through GIFT VIII and its community's fundraising capacity to determine how much it will request through GIFT IX's Matching Grant component. Once a community foundation has determined the grant amount it plans to request, it should submit a Matching Grant proposal that includes the following information organized in the order listed below:

Cover Letter: This is a **one-page** letter signed by the community foundation's executive staff leader and board chair confirming the foundation's intent to apply for the Matching Grant and the amount being requested.

Proposal Narrative: This is a description (**no more than four (4) pages**) of how the community foundation intends to allocate its Matching Grant. If a community foundation chooses to allocate any portion of its grant to the CPP option, the narrative should include the following:

- A description of the projects or programs the community foundation intends to undertake with its Matching Grant. This should include a description of the community needs being addressed.
- A brief description of the rationale for pursuing the proposed projects or programs. This could include, among other things, information corroborating the community's demand for the proposed projects and programs; an explanation of how the proposed projects and programs will address community needs; and, if applicable, a summary of the community foundation's past efforts to address the identified needs.
- A timeline for implementation.
- A description of the community foundation's plans for raising qualifying matching funds.
- If applicable, a description of how the projects or programs will be sustained after the Endowment's grant is expended.

Budget: This is a detailed account of how a community foundation intends to allocate its Matching Grant between the matching options. If a community foundation chooses to allocate any portion of its grant to the CPP option, the budget should also include a breakdown of the projects or programs the foundation intends to support through this grant opportunity. The budget should be submitted within the proposal's PDF file as well as in a separate Excel file.

Budget Narrative: If the budget includes amounts allocated for the CPP option, the proposal should also include a budget narrative that describes each budget line item and clearly explains how it was calculated, including any assumptions made. If the total budget for any community projects or programs exceeds the

funding request to the Endowment, the budget narrative should indicate the total costs of the projects or programs and what percentage is being funded by the Endowment's Matching Grant.

Public Support Worksheet: This is a community foundation's most recent public support calculation. The information required to make this calculation can be found on Schedule A of the community foundation's Form 990 and should be completed using the Excel form titled "Public Support Worksheet," available on the [Endowment's website](#). This should be submitted as a separate Excel file.

Matching Conditions

Similar to GIFT VIII, Matching Grants under GIFT IX will be paid to each community foundation prior to the end of the scheduled matching period regardless of the total matching funds raised as of the date of payment. Any Matching Grant for which a community foundation applies will be tentatively scheduled for payment during the third quarter of 2026. To the extent a community foundation does not fulfill its matching requirement prior to the end of the matching period, the Endowment will reduce any Matching Grant that it might approve in the future for the community foundation by the amount of the shortfall.

The matching period will begin January 1, 2026, and end June 30, 2028 (see the exception below for a community foundation that has met its GIFT VIII matching requirement prior to December 31, 2025). Qualifying matching funds must consist of contributions of cash or property (such as marketable securities, cash equivalents and real property, matched on the basis of their gift value as determined by applicable United States Treasury Regulations) completed during the matching period, the present value of irrevocable deferred gifts (such as charitable remainder trusts) made during the matching period, and irrevocable pledges of cash executed during the matching period that are required to be paid by June 30, 2030. The Endowment will not be obligated to match any contribution, gift or pledge matched by the Endowment under its own incentive or other matching program or grant.

Gifts of Grain or Livestock: New for GIFT IX, qualifying matching funds will also include cash received by a community foundation from the sale of grain or livestock that was gifted to the community foundation. To qualify, the gift, the sale and the cash receipt must all have occurred during the matching period.

Completed GIFT VIII Match: On a case-by-case basis, the Endowment will consider permitting the GIFT IX matching period to commence as early as October 1, 2025, for a community foundation that has already completed its GIFT VIII matching requirement prior to the end of the GIFT VIII matching period on December 31, 2025. If a community foundation has already met or anticipates meeting its GIFT VIII matching requirement prior to December 31, 2025, it should contact the Endowment at gift@lei.org for further guidance.

Matching Grant Submission Guidelines

Matching Grant proposals, including the cover letter signed by the foundation's executive staff leader and board chair, must be submitted through the [Endowment's website](#) by noon (ET) on **Tuesday, June 30, 2026**. Proposals should be submitted as a single PDF along with Excel copies of the budget and public support worksheet. See Appendix 1 on page 12 for the Matching Grant Submission Checklist.

Eligibility Requirements

GIFT IX is a voluntary program for eligible Indiana community foundations. Additional program requirements and terms are as follows:

- A community foundation must have satisfactorily participated in any previous GIFT phase or program or received special authorization from the Endowment to participate. The Endowment reserves the right to determine whether the participation of a community foundation in a previous phase/program was satisfactory.
- The applicant must be legally established as a community foundation in the state of Indiana and recognized as a public charity by the Internal Revenue Service. An affiliate fund must apply through the community foundation with which it is affiliated.
- If more than one community foundation serves a county, those community foundations must collaborate in applying for each GIFT IX grant opportunity. Only one proposal per county will be accepted for each of the Community Support Grant and Matching Grant funding opportunities. Community foundations serving multiple counties must submit a separate Community Support Grant and Matching Grant proposal for each county served, although some information may be the same in each proposal.
- The applicant must have a board of directors or county advisory board that broadly represents the county it serves.
- The applicant must be able to demonstrate that financial controls and procedures are in place to safeguard, account for and responsibly invest its assets.
- The Endowment reserves the right to decline any proposal under GIFT IX on the basis of other factors, such as the impact of a grant from the Endowment on the public charity status of a recipient.

Please email questions related to GIFT IX to gift@lei.org.

Appendix 1 – GIFT IX Grants Submission Checklist

Community Support Grants: Due by noon (ET) on Thursday, November 6, 2025. Proposals must be submitted through the [Endowment's website](#) as a single PDF along with Excel copies of the budget and public support worksheet.

Single PDF:

- Cover Letter (one page)
- Proposal Narrative (no more than five pages)
- Letter of Support from Board of Directors
- Budget

Separate Excel documents:

- Budget
- Public Support Worksheet

Matching Grants: Due by noon (ET) on Tuesday, June 30, 2026. Proposals must be submitted through the [Endowment's website](#) as a single PDF along with Excel copies of the budget and public support worksheet.

Single PDF:

- Cover Letter (one page)
- Proposal Narrative (no more than four pages)
- Budget
- Budget Narrative (if matching funds are allocated to the CPP option)

Separate Excel documents:

- Budget
- Public Support Worksheet