



Guidelines for Applying for a Grant

2016-2017

Contact Us

connect@thephilanthropyconnection.org

<http://www.thephilanthropyconnection.org>

WELCOME

November, 2016

As The Philanthropy Connection enters its fourth year of giving, we invite you to apply for a \$25,000 grant.

The Philanthropy Connection (TPC) is a multi-generational women's collective giving organization whose 250+ members are committed to improving the lives of low-resource individuals throughout the Greater Boston area. Our goal is to inspire members to become engaged philanthropists and to foster ongoing relationships with our grant recipients to further the efforts they lead.

Please read this document carefully because our grants process has significantly changed this year, including our increased outreach to, and interest in funding, grantee organizations that serve diverse communities and whose leadership and staff reflect the race/ethnicity of the communities they serve. The key stages in our grant-giving process, which is described in detail in the following pages, are:

1. Letter of Intent Application
2. Full Proposal Application
3. Site Visit by TPC Members

In our final step, all Team Captains meet to determine which final candidates will appear on TPC's ballot in May 2017. Each member then votes for those organizations she would most like to become grantees, and grants are awarded to those organizations with the greatest number of votes.

On behalf of the Grants Committee and all TPC members, we hope to have the opportunity to get to know your organization during the coming year. In the meantime, many thanks for all you do to improve the lives of so many in our communities.

Should you have questions at any point, feel free to contact us at:
connect@thephilanthropyconnection.org



Susan Benford
President, The Philanthropy Connection
Chair, Grants Committee

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BACKGROUND ABOUT THE PHILANTHROPY CONNECTION

- Who:** Founded in 2012, The Philanthropy Connection (TPC) is a volunteer-run, women's collective giving organization with over 250 members.
- What:** We pool together our members' contributions to provide grants to Massachusetts non-profit organizations that improve the lives of low-resource individuals. In our first three years, we awarded grants totaling \$131,000, \$231,000, and \$253,000. This year, we will award grants of \$25,000 to each of the organizations selected by our members following our grant review process.
- Why:** TPC defines a philanthropist as one who makes a difference in her community by donating time, expertise, and/or money, and we want to encourage more women to step into the role of philanthropist. We also foster lasting relationships between grant recipients and members, many of whom continue to stay in touch and get involved long after a grant has been awarded.
- Where:** We award grants to organizations in the Greater Boston metropolitan area, almost exclusively within the I-495 loop.
- Our Sweet Spot:** We fund 501(c)(3) organizations (or organizations that have a fiscal sponsor) with annual revenue between \$200,000 and \$2 million. Please note that **we provide funding for operations**, tangible goods, programs, and infrastructure-building projects.

Prior Grantees

The ten grantees we funded in June 2016:
www.thephilanthropyconnection.org/grantees

Prior to 2016, we funded these organizations:

Crossroads for Kids
www.crossroads4kids.org

Family Nurturing Center
www.familynurturing.org

REACH Beyond Domestic Violence
www.reachma.org

RESPOND
www.respondinc.org

Career Collaborative
www.careercollaborative.org

Coaching4Change
www.coaching4change.org

Compass Working Capital
www.compassworkingcapital.org

Family Nurturing Center*
www.familynurturing.org

Political Asylum/Immigration Representation Project
www.pairproject.org

School on Wheels Massachusetts*
www.sowma.org

Sibling Connections*
www.siblingconnections.org

Silver Lining Mentoring (formerly known as Adoption and Foster Care Mentoring)*
www.silverliningmentoring.org

* Grantees are eligible to apply for a second year of funding. These organizations received a second year of funding.

OUR GRANT-GIVING PROCESS AND CRITERIA

Here is an overview of TPC's grants process:



OUR GRANT-GIVING PROCESS AND CRITERIA

Please adhere to the following steps, noting that **our eligibility and process have changed since our prior grants cycle and that applications will now be submitted online:**

Step 1. Determine eligibility

All applicants must:

- A. Have either 501(c)(3) tax status **OR** have a Fiscal Sponsor and a Fiscal Sponsorship Agreement letter
 - In the case of local organizations/affiliates with a larger parent organization, the local organization/affiliate **must** have its own 501(c)(3) status
- B. Meet revenue eligibility criteria:
 - 501(c)(3) organizations must have annual revenue between \$200,000 and \$2 million, as reported on the Total Revenue line 12 of its most recent IRS Form 990
 - Organizations with fiscal sponsors must have annual revenue between \$200,000 and \$2 million certified in a letter from its Fiscal Sponsor, including only that which would be reported on the Total Revenue line 12 of IRS Form 990
- C. Meet geographic eligibility criteria:
 - An eligible applicant must be located in the Greater Boston metropolitan area, or for national organizations, have a site within this area, defined largely as towns falling within the I-495 loop, plus:
 - Amesbury, Haverhill, Methuen, Lawrence, Lowell
 - Maynard, Hudson, Marlborough, Milford, Franklin
 - Massachusetts towns north of the intersection of I-495 and Rt. 25
- D. Meet mission eligibility criteria:
 - An applicant must address in its mission one or more of the following:
 - Poverty
 - Income inequality
 - Employment opportunity and readiness
 - Educational opportunity and readiness
 - Health and wellness
 - Social bias (e.g., gender, ethnic, and/or racial)

Step 2. Submit a funding request for one of these areas:

- Operations and general support
- Programming (existing, new, or expanded)

- Tangible goods to advance a program (e.g., a van, cameras, computers)
- Infrastructure-building resources including, but not limited to, those for:
 - Evaluation: developing methods to collect, analyze, and use information to assess efficacy of projects, policies, or programs;
 - Organizational development: creating or enhancing approaches to solicit and gather contributions, identify donors, and other organizational development needs;
 - Planning: strategic, financial, or marketing planning;
 - Communications: marketing and public relations, social and/or traditional media, and website design;
 - Board of Directors: strengthening the Board's ability to lead, manage, and/or monitor the organization.

Step 3. Review disqualifying criteria:

- Applications will not be accepted from the following types of organizations:
 - Political, international, or 501(c)(4) advocacy organizations
 - Organizations that offer religious programming
 - Family foundations
 - Local organizations or affiliates of a larger parent organization that lack their own independent 501(c)(3) status
- Funding requests for capital campaigns will also not be accepted

In fairness to all applicants, no exceptions will be made.

KEY DATES: 2016-2017 GRANTS CALENDAR

- November 14: Letter of Intent Applications are circulated
- December 12: Letter of Intent Applications are due to TPC at 5 p.m. EST
- January 27: Requests for Full Proposals Announced
- February 24: Full Proposals Due to TPC at 5 p.m. EST
- March 28: Site Visit Requests Announced
- April 25: Site Visits Completed
- May 11: TPC Announces Non-profits on its Ballot
- May 30: Non-profits Notified of TPC Voting Results
- June 1: New TPC Grantees attend Annual Meeting

FREQUENTLY ASKED QUESTIONS

What is TPC's funding source?

Our members! TPC has two levels of membership: young philanthropists (those 35 and younger) contribute \$500 to our grant pool, and women over 35 contribute \$1,000. Each year, this entire pool of money is divided into \$25,000 grants awarded to local non-profits selected via our collective process.

To read more about how collective giving works, click the link below:

<http://www.thephilanthropyconnection.org/about-us>

What is TPC's grant-making process?

TPC members volunteer to participate in the grant review process. Volunteers are organized into six to eight person Grant Review Teams, and three Team leaders are appointed: a Captain, a Deputy, and a Finance Lead responsible for evaluating an applicant's financial statements.

These Team leaders participate in training sessions focused on TPC's rigorous and systematic grant evaluation process. Afterwards, each Grant Review Team is allocated a set of Letter of Intent (LOI) applications to evaluate. Based on the information provided in these applications, each Team determines which organizations will be invited to submit a Full Proposal. Teams evaluate these Full Proposals and choose which organizations will be asked for Site Visits. At the completion of these Site Visits, Teams recommend which organizations will be placed on TPC's ballot for all members to vote upon in May. Each member casts one vote, regardless of her age and financial contribution, and applicants with the most votes receive grants. The new grantees are announced and have the opportunity to meet our members at our Annual Meeting, which will be held on June 1, 2017 for the current grant cycle.

Are TPC grants limited to organizations providing services for women only?

No. TPC funds programs and organizations serving all people, not just women.

If my organization has received a TPC grant in the past, may we apply again?

Current grantees in their second year of a TPC grant are not eligible to apply for a third year of funding. All other past grantees are eligible.

How will I know my completed application was received?

Each applicant receives an email confirming that its application was received.

May a grantee use grant funding for a different program or project than it indicated during the application process?

No. A grant may be used only for the purpose stated in the grant application as per the terms of the formal agreement signed by The Philanthropy Connection and the grantee.

May an organization submit more than one grant proposal?

No.

May an organization apply the next year to continue the grant?

Yes. An organization may be funded by TPC two years in a row provided the organization has complied with all conditions of the initial grant.

Will my organization have a dedicated contact at TPC if we receive a grant?

Yes. Through the TPC Liaison Initiative, each grantee will have a team of two members who serve as its main points of contact with TPC. A TPC Liaison will contact you at the beginning of your grant award to schedule a time to meet with you and your team. At this introductory meeting, you learn more about TPC and we will learn more about your organization.

If my organization receives a grant, will we be required to communicate periodic status updates to TPC?

Grantees are expected to meet with their TPC Liaison at the middle and end of the grant year to discuss the program's status, factors leading to success, and obstacles encountered. In addition, your organization will be required to submit a written interim and final report, the requirements of which are spelled out in Section II of the Grant Letter Agreement.

Are there additional ways that TPC members can get to know more about our organization and vice versa?

Yes. Along with attending your organization's annual fundraiser and/or gala as specified in the Grant Letter Agreement, there are several ways for us to learn more about one another. TPC Liaisons facilitate this interaction and connect grantees to the larger TPC Board and membership. Grantees seeking volunteers and other support will have the additional opportunity to share their organizational priorities with TPC members through mechanisms such as our newsletter and speaking engagements. In addition, TPC would wholeheartedly welcome invitations to attend other events held at your organization during the year.

Questions about financial documentation and reporting

What financial information must be submitted with our application?

For the LOI application:

Organizations must include the following with their LOI application:

- 1) 501(c)(3) status letter **OR** Fiscal Sponsor agreement letter
- 2) First page of the most recent IRS Form 990 **OR** letter from the Fiscal Sponsor certifying the applicant's revenue, including only that which would be reported on the Total Revenue line of IRS Form 990

For a full proposal from a 501(c)(3) organization:

- 1) Form 990 (with all IRS-required attachments) for the last fiscal year;
- 2) Certified Financial Review or Audit (with all notes) for the last two fiscal years;
- 3) Year to date (YTD) Income Statement for most recent closed quarter and YTD Income Statement for comparable quarter in the prior year **OR** YTD Actual vs. Budget for current fiscal year; and

- 4) List of grants with their amounts and terms for the last two years.

For a full proposal from an organization with a Fiscal Sponsor:

- 1) Income Statement for the last two years;
- 2) Balance Sheet for the last two years;
- 3) YTD Income Statement for most recent closed quarter and YTD Income Statement for comparable quarter in prior year **OR** YTD Actual vs. Budget for current fiscal year; and
- 4) List of grants with amount and terms for the last two years.

We look forward to learning about your organization. If you have a question not answered in the FAQs above, please email connect@thephilanthropyconnection.org.