



**Guidelines for Applying for a Grant
2018-2019**

Contact Us

connect@thephilanthropyconnection.org

<http://www.thephilanthropyconnection.org>

WELCOME

November, 2018

As The Philanthropy Connection enters its sixth 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. Our goal is to fund strong organizations whose mission is to improve the lives of economically or socially disadvantaged individuals throughout the Greater Boston area. We also seek to inspire our 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 as it contains all the information you need to apply for a grant. As was the case last year, one of our goals is to fund grantee organizations that serve diverse communities and whose leadership and staff reflect the racial and ethnic diversity 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 2019. 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

Barbara Gaskin
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 economically or socially disadvantaged individuals. In our first five years, we awarded grants totaling over \$1,000,000. 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

OUR 2018-2019 GRANTEES ARE:

Adolescent Consultation Services supports and empowers court-involved children and families by providing mental health services to help them envision and work toward a better future.

Boston Area Gleaners rescues surplus farm crops and distributes this produce to people in need.

Budget Buddies* promotes and teaches financial literacy and confidence among low-income women.

Community Legal Services and Counseling Center provides free civil legal aid and affordable psychological counseling to low-income people.

Enroot empowers low-income, immigrant high school students to achieve academic, personal, and career success through mentorship, leadership development, professional internships, and academic support.

Health Care Without Walls improves the lives of women who are homeless or marginally housed through compassionate, high quality health care, education, and advocacy.

Justice at Work improves conditions for immigrant workers in low-wage industries by providing legal and technical support to community-based worker organizations and their members.

Partners for Youth with Disabilities empowers youth with disabilities to reach their full potential by providing transformative mentoring programs, youth development opportunities, and inclusion expertise.

Resilient Coders* teaches coding and other workplace skills to 18 to 26 year old high-risk youth and places them in internships and entry-level jobs.

School on Wheels* educates children impacted by homelessness by providing academic support and one-on-one mentoring so children can reach their full potential.

OUR ALUMNI GRANTEES ARE:

BEST Hospitality Training trains low-income adults and immigrants for secure union jobs with benefits in Boston area hotels.

Boston Court Appointed Special Advocates (CASA)* represents children involved in abuse and neglect cases by training volunteers who help these children find safe, permanent homes.

Career Collaborative seeks to end working-class poverty by helping adults get and succeed at life-changing jobs, making Massachusetts and its families stronger.

Catie's Closet improves school attendance by providing clothing and toiletries to children in grades K-12, right within their schools.

Coaching4Change teaches high school students to become leaders by coaching after school youth sports programs, organizing school-wide athletics tournaments, and running youth sports "skills and drills" clinics.

Compass Working Capital provides financial services to low-income families, empowering them to build savings and financial capabilities as a pathway out of poverty.

Crossroads for Kids provides a unique combination of immersive summer camp and year-round mentoring and enrichment programs to guide them toward academic success, higher education, meaningful careers, and responsible citizenship.

Daily Table addresses food insecurity, food waste, and the effects of poor diet by offering affordable groceries at a not-for-profit retail grocery store.

Doc Wayne Youth Services fuses sport and therapy to heal and strengthen at-risk, low-income youth aged 5 to 18.

Family Nurturing Center of Massachusetts* provides comprehensive family support from birth to adolescence, coordinating a range of programs and community-based services that engage families in school readiness activities, resource referral, and advocacy.

Families First promotes the secure and nurturing child-parent relationships that are the foundation of every child's well-being and future success.

Food for Free rescues fresh food that might otherwise go to waste and distributes it within the local emergency food system where it goes to those in need.

Friends of the Children Boston provides 1:1 mentoring from grades K to 12 for students in Boston's lowest performing schools.

Future Chefs prepares youth for quality employment and post-secondary opportunities in the culinary field by teaching them a broad base of transferable skills.

Latino Stem Alliance inspires and empowers underserved youth to achieve career success in STEM fields.

Louis D. Brown Peace Institute works with victims, perpetrators, and their families who have endured murder, trauma, and loss.

Mill City Grows is growing a healthier Lowell by creating urban food production sites all over the city, and providing the tools for safe urban growing.

Political Asylum/Immigration Representation (PAIR) Project* is the premier provider of *pro bono* immigration legal services to asylum-seekers and immigrants unjustly detained in Massachusetts.

REACH Beyond Domestic Violence is providing safety and support to survivors of abuse while engaging communities to promote healthy relationships and prevent domestic violence.

Refugee & Immigration Assistance Center offers resettlement and post-resettlement services to refugees and immigrants.

RESPOND, Inc. is New England's first domestic violence agency and the second oldest in the nation, and a pioneer in the movement to end domestic violence.

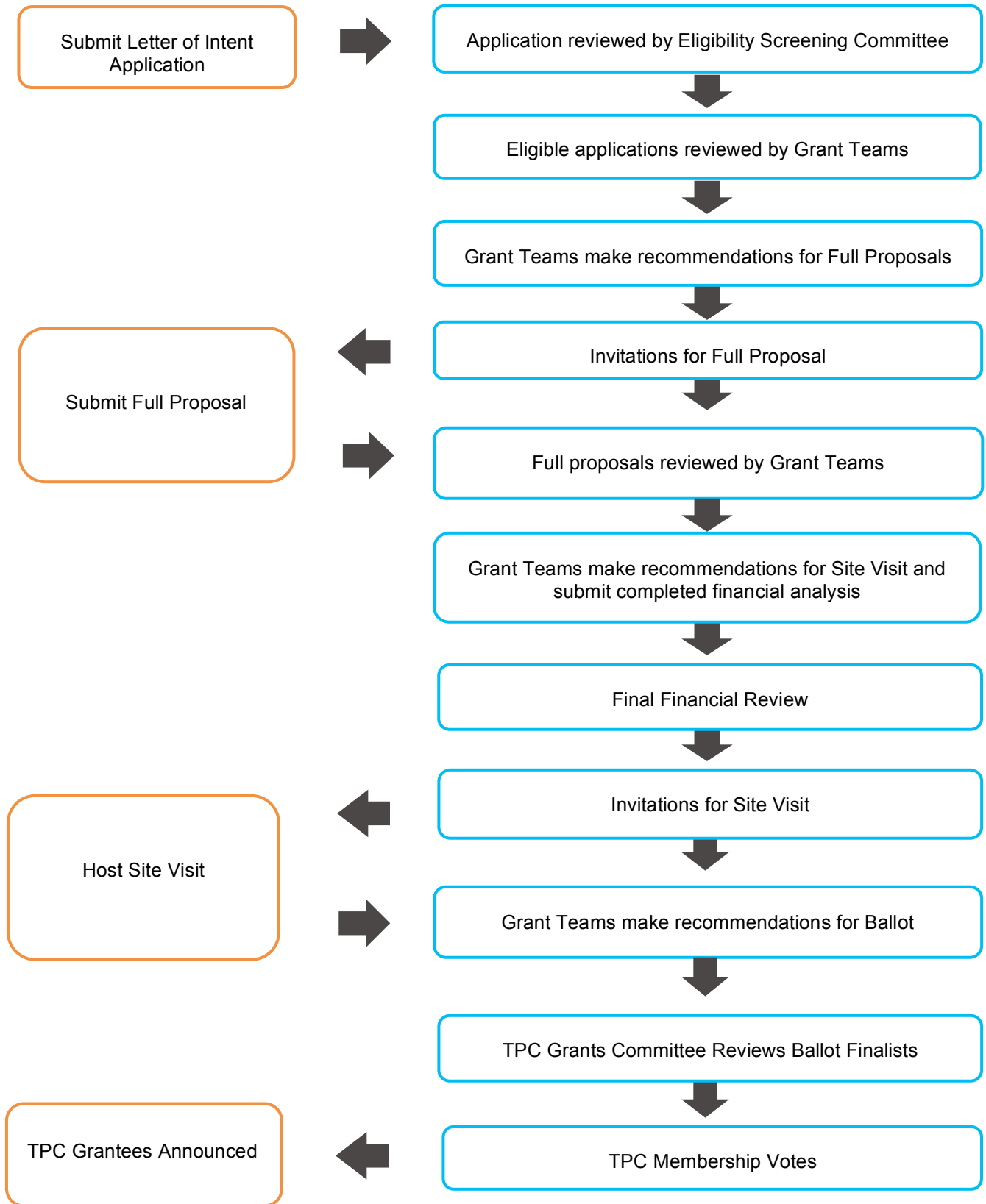
Science Club for Girls fosters literacy in STEM for girls, particularly from underrepresented communities, by providing experiential programs and interactions with women mentors in STEM fields.

Sibling Connections* reunites brothers and sisters who have been separated by their placement in foster care.

Silver Lining Mentoring* empowers youth in foster care to flourish through committed mentoring relationships and the development of essential life skills.

** Denotes organizations that have received funding in more than one grants cycle.*

OUR GRANT-GIVING PROCESS AND CRITERIA



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Please adhere to the following steps:

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
 - Organizations must be in solid financial standing and have filed requisite Massachusetts Form NP and IRS 990 filings. TPC typically does not fund organizations with significant year over year operating losses or less than 3 months of cash reserves to cover operations.

- 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 provide any religious programming, instruction or proselytizing on behalf of a particular religion
 - Family foundations
 - Local organizations or affiliates of a larger parent organization that lack their own independent 501(c)(3) status
 - "Pass through" or conduit organizations
- Funding requests for capital campaigns will also not be accepted

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

KEY DATES 2018-2019 FOR THE GRANT APPLICATION PROCESS

November 12: New Grant cycle starts and applications are distributed

December 10: Letters of Intent due at 5 p.m., EST

January 28: Requests for full proposals are sent to applicants

February 25: Full proposals are due at 5 p.m., EST

April 1: Applicants sent site visit requests

April 29: TPC concludes all site visits

May 28: Organizations notified of grant awards

May 29: New Grantees attend TPC's Grant Awards and All Member 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 for the current grant cycle.

Can I still apply to TPC if I do not meet all the criteria listed here?

We love to learn about organizations that are doing good work. However, due to the large number of qualified applicants that we receive each year, we must be consistent in applying eligibility criteria and we cannot accept applications that do not meet them.

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 consecutive year of funding. They may apply again after one year off. 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. Application form will allow for the executive director's email and an additional contact's email. Those emails will receive the submission receipt.

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 apply to 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 within the first quarter of your grant award to schedule a time to meet with you and your team. At this introductory meeting, you will learn more about TPC and we will learn more about your organization. We also encourage you utilize our liaison program stay in touch with the broader TPC membership throughout the year. Liaisons will be in touch with you to invite you to participate in 1-2 events, publicize a "wish list" to our membership and publicize your events on our social media. Past recipients have found volunteers, donors and board members through this continued exposure.

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, how you have used the grant relative to your planned expenditure, factors leading to success, the impact of our grant on your community 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) 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
- 2) Most recently filed Massachusetts Form PC (for 501c3 only)
- 3) Fiscal Sponsor agreement letter (for fiscally sponsored applicants only)

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) Full Year and Year to date (YTD) Income Statement and Balance Sheet since filing of most recent 990; and
- 4) List of grants over \$2500 with their amounts and terms for the last two fiscal 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 and Balance Sheet; and
- 4) List of grants over \$2500 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.