



**TPC'S Grant-Giving Process
2022-2023**

Contact Us

connect@thephilanthropyconnection.org

<http://www.thephilanthropyconnection.org>

WELCOME

November 10, 2022

As The Philanthropy Connection enters its tenth year of giving, we invite you to apply to become one of our grantees.

The Philanthropy Connection (TPC) is a multi-generational women's collective giving organization whose 250+ members contribute dues into a common grants pool and vote which local non-profits receive them. Our goal is to fund strong organizations that address systemic inequities in the areas of poverty; income inequality; employment opportunity and readiness; educational opportunity and readiness; health and wellness; and social bias (e.g., gender, ethnic, and/or racial). We also seek to inspire our members to become engaged, informed 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 organizations that serve diverse communities and whose leadership and staff are positioned in terms of experiences, background, and knowledge to execute on their mission. The key stages in our grant application 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

Subsequently, Grant Teams meet to determine which final candidates will appear on TPC's ballot in May 2023. Each TPC member then votes for those organizations they 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

Bridget Dunn & Leslie Levenson
Co-Presidents, The Philanthropy Connection

Sue Meehan & Tatiana Joyce
Co-Chairs, Grants Committee

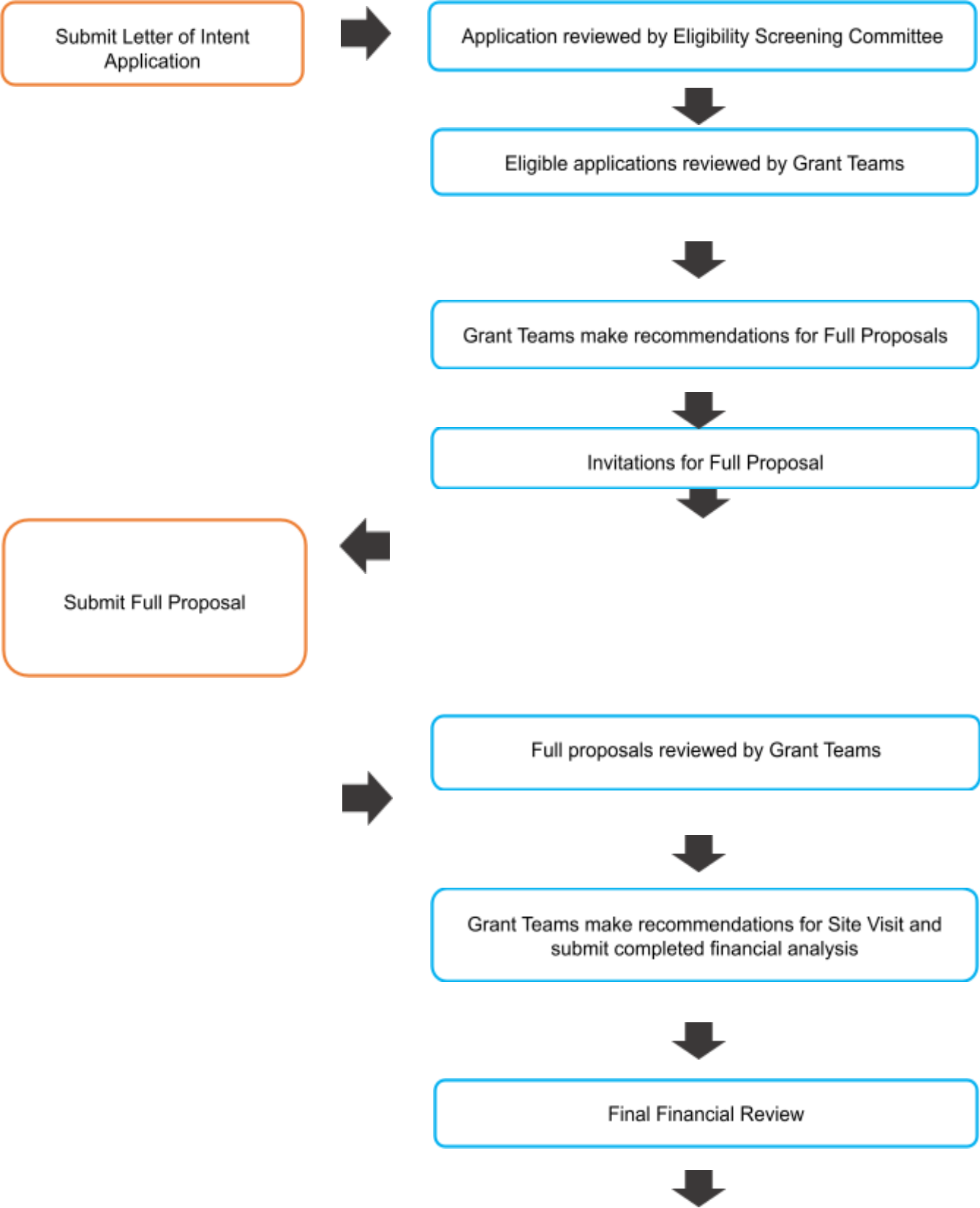
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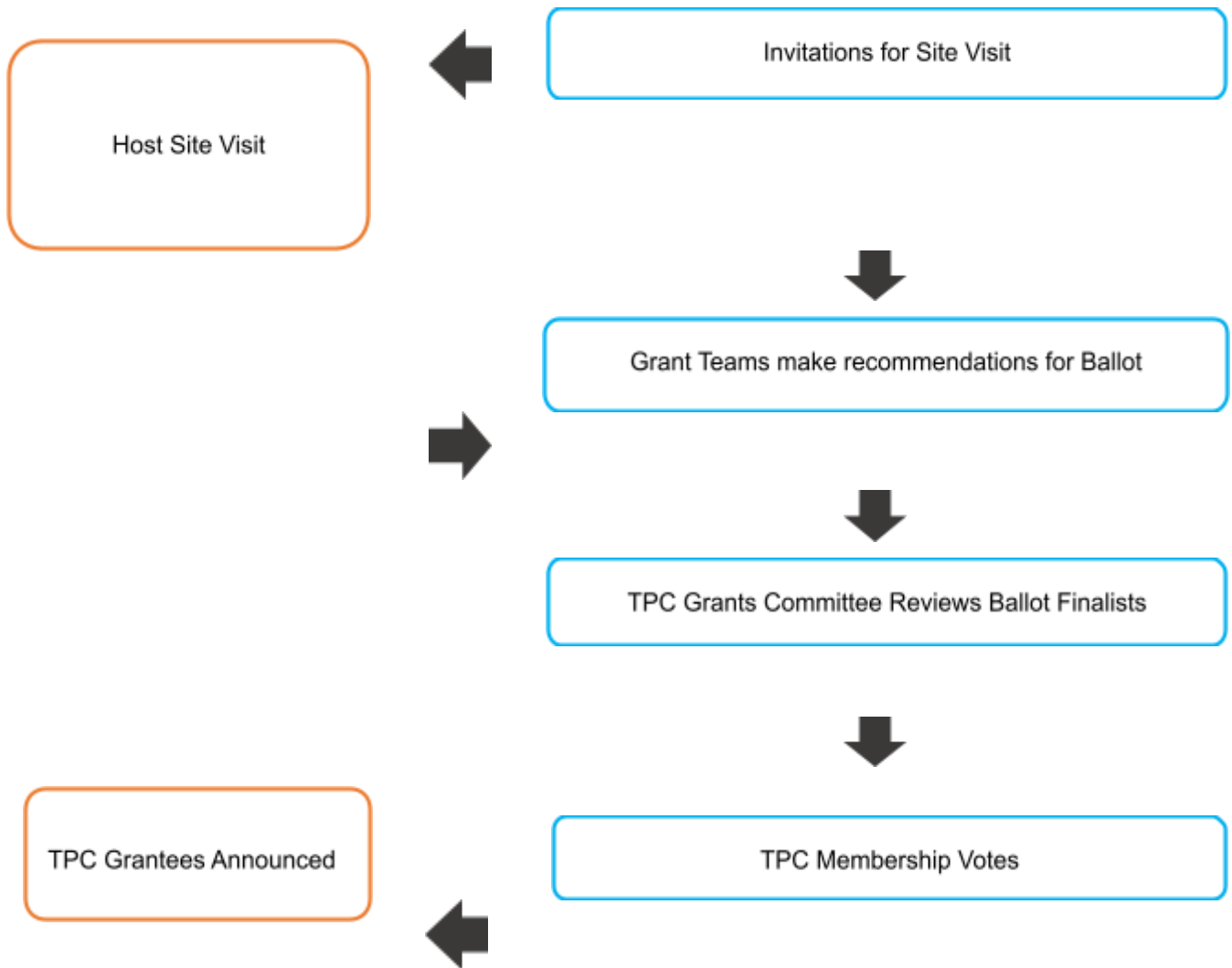
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BACKGROUND ABOUT THE PHILANTHROPY CONNECTION

- 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 seven years, we awarded grants totaling over \$1,600,000. We award unrestricted grants of **up to \$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 their 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.
- Our Grantees:** Please visit our website to see current and previous grantees:
<https://thephilanthropyconnection.org/who-we-fund/>

OUR GRANT-GIVING PROCESS AND CRITERIA





OUR GRANT-GIVING PROCESS AND CRITERIA

Please adhere to the following steps:

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

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 2022-2023 FOR THE GRANT APPLICATION PROCESS

November 10: New Grant cycle starts and applications are distributed

December 9: Letters of Intent due at 5 p.m., EST

January 27: Requests for full proposals are sent to selected applicants

February 24: Full proposals are due at 5 p.m., EST

Late March-Early April: Applicants sent site visit requests

April 16: TPC concludes all site visits

Mid-Late May: Organizations notified of grant awards

June TBD: New Grantees attend TPC's Grant Awards and All Member Meeting (whether virtual or in-person)

What is TPC's funding source?

Our members! TPC has four membership investment levels: \$2,500, \$1,200, \$600, \$300. Each year, this money is divided into grants of up to \$25,000 that are awarded to local nonprofits selected via our collective process.

[Read more about how collective giving works.](#)

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 their 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 Grants Award Meeting, which will be held in late May/early June 2023.

Can I use an LOI that I've submitted to another funder?

Yes! We want to make the LOI process as easy as possible for your organization. If you have recently submitted an LOI or proposal to another funder that you think provides the information TPC is looking for, we encourage you to submit. You can leave notes to clarify/make additions in our LOI form if needed.

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

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

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?

All current grantees are eligible to apply for another year of funding (whether second or third consecutive year). All other past grantees are eligible to apply at the LOI stage.

How will I know my completed application was received?

Each applicant receives an email confirming that its application was received. The application form will allow for the executive director's email and an additional contact's email. Those emails will receive the submission receipt.

How may TPC's grant funding be used?

This year TPC is awarding only unrestricted grants.

May an organization submit more than one grant proposal? No.

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 to utilize our Liaison program to stay in touch with the broader TPC membership throughout the year. Past recipients have found volunteers, donors, and board members through TPC's Liaison Program

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 Liaisons at the middle and end of the grant year to discuss the organization's status, how you have used the grant, 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 TPC Board and larger 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) 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) Fiscal Sponsor agreement letter (for fiscally sponsored applicants only)

Sample attachments we may ask for in the full proposal stage:

For a 501(c)(3) organization:

- 1) Certified Financial Review or Audit (with all notes) for the last two fiscal years;
- 2) Year to Date Actual vs. Budget for current fiscal year

For an organization with a Fiscal Sponsor:

- 1) Income Statement for the last two years;
- 2) Balance Sheet for the last two years;
- 3) Year to Date Actual vs. Budget for current fiscal year

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