

INFORMATION SESSION

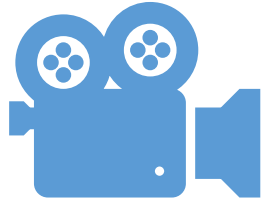
2023

Discretionary

Grantmaking



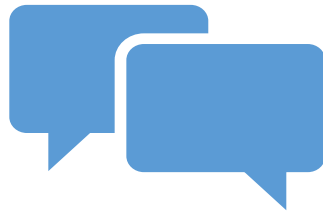
Logistics



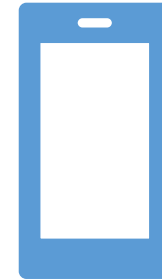
Session is being recorded and will be posted on PF website



Mute
Microphone



Utilize chat box



No social media

01

WELCOME AND INTRODUCTIONS

02

OVERVIEW

03

ELIGIBILITY & APPLICATION PROCESS

04

Q&A

We Are Your Community Foundation

The Philadelphia Foundation is one of the nation's first community foundations – and the largest devoted to **improving lives in Greater Philadelphia.**

We drive service, philanthropic growth and impact by integrating **deep relationships** across the community, **unique knowledge** of local nonprofits and **philanthropic expertise.**

Since our founding, we've awarded over **\$650 million in grants and scholarships.** Our assets are currently comprised of 1,000+ pooled funds contributed by people committed to strengthening the economic, civic and social vitality of our region.



Philadelphia Foundation – Staff Contact information

PHILADELPHIA
FOUNDATION

LEANN AYERS

*Executive Director of
Grantmaking (Acting)*

Senior Program Officer

215-863-8124

Special Initiatives

Leadership and Advocacy

Brook J. Lenfest Foundation



SHERESSA GORDON

*Program Officer,
Grantmaking Operations*

215-863-8122

Donor Advised Funds

Special Initiatives

Henrietta Tower Wurts

KIM GILMORE

Program Officer

215-863-8117

Scholarships



ANGELINES PABON (ANGIE)

Program Officer

215-863-8123

Fund For Children

YOUTHadelphia

Philadelphia Foundation – Staff Contact information

PHILADELPHIA
FOUNDATION

KADRISSE McINTOSH

Grants Associate

Donor Advised Funds
Grants Operations Support



KASEY THOMPSON

Program Officer

Direct Service
DAs Office Funds
Special Initiatives

MAGGI KIRK

*Development and Donor
Services Officer*
215-863-8105

TED QUALLI

*Marketing &
Communications Director*
215-863-8126

Philadelphia Foundation Grantmaking Processes

Donor Advised Funds (DAFs)

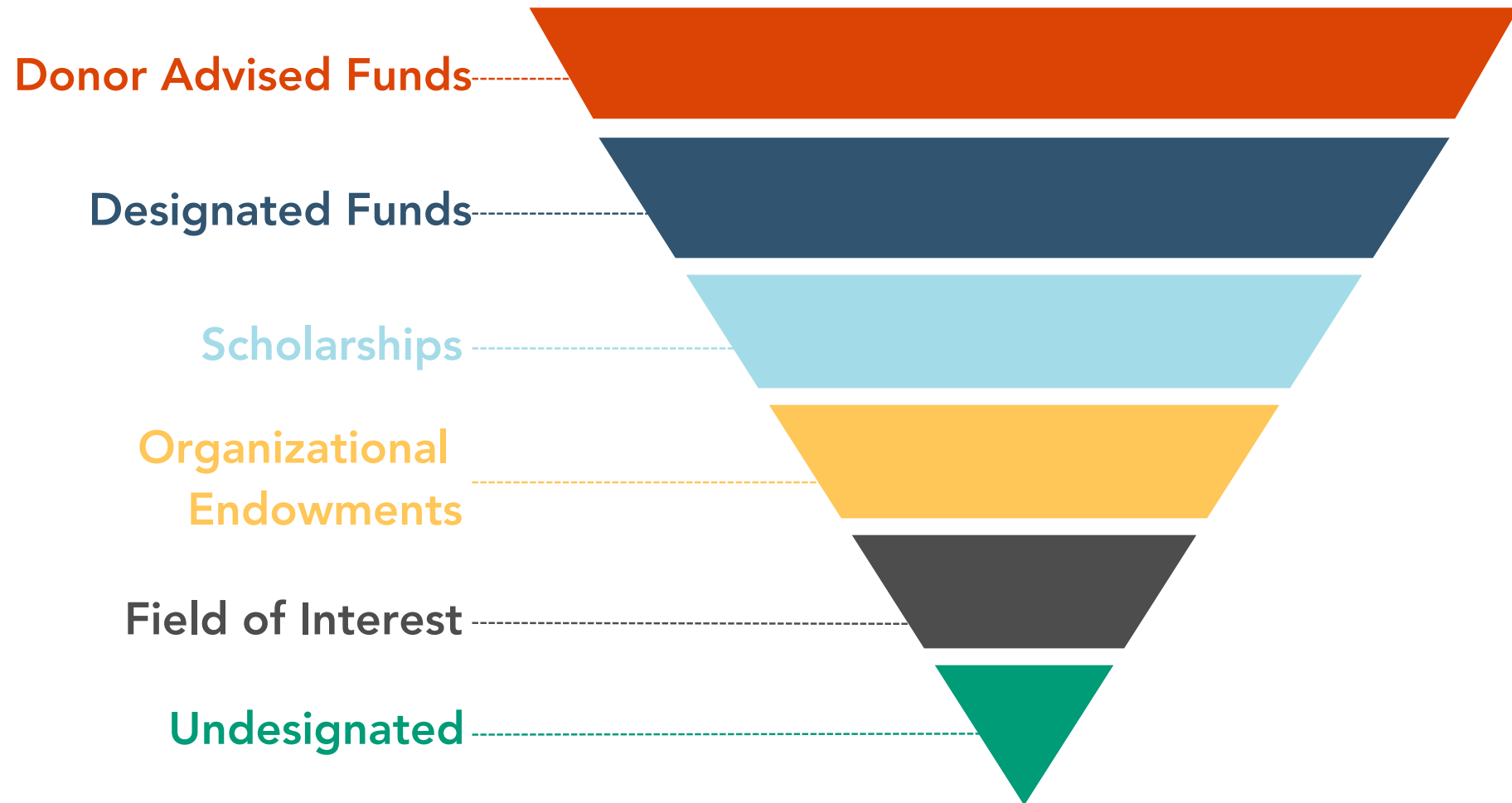
a process administered by the Philadelphia Foundation to manage charitable donations on behalf of organizations, families, or individuals.

Discretionary Grantmaking

a process where Philadelphia Foundation staff exercise judgment (discretion) in selecting the grant recipient organization through a competitive process.

Special Initiatives and Grants Management – Philadelphia Foundation staff play varying roles in receiving and managing grant applications for funds which the Foundation administers in partnership with other groups. (for example, Henrietta Tower Wurts Memorial)

Fund Types



Donor Advised Grantmaking

Donor Advised Form (DAF) for Non-Profits:

Form for Nonprofits Seeking Support through Donor Advised Funds

- Name of Organization:
- Executive Director:
- Contact Information of Organization:
- Website Address:
- 501(c)3 Tax Exempt Status Yes No

All non-profits need to have 501(c)3 IRS tax exempt status to receive funds

Access the form [here](#)

Discretionary Grantmaking Categories

Direct Service/General Operating Grants

Unrestricted grants available on a competitive basis for well-run nonprofits serving communities with high poverty rates while operationalizing equity at all levels of their work. [2023 Direct Service Application](#)

Impact Program Grants

Program grants available to nonprofits demonstrating programmatic impact. [2023 Impact Grant Application](#)

Leadership Grants

Project grants available on a competitive basis to increase measurable skills and racial diversity of pipelines for senior staff and board of nonprofits; and to strengthen organizational capacity and nonprofit leaders in the areas of governance, planning, civic engagement, board and staff development and diversity, equity and inclusion. [2023 Leadership Grants Application](#)

Discretionary Grantmaking Categories

Advocacy Unrestricted Grants

Unrestricted grants available to organizations addressing policy changes in relation to racial and social justice. Emphasis on utilizing advocacy and community organizing best practices towards policy change on behalf of marginalized and low-income communities in Greater Philadelphia. [2023 Advocacy Unrestricted Application](#)

Fund for Children Strategic Investment in Youth Grants

Unrestricted grants for Philadelphia-based youth organizations whose missions prioritize youth leadership, civic engagement and youth organizing activities and outcomes. [2023 Fund For Children Strategic Investment in Youth Application](#)

YOUTHadelphia Grants

Program or Project grants to youth organizations that include social and political themes and content, and help young people develop skills and capacity to be decision makers and action-oriented problem solvers. Emphasis on youth-led work.

Eligibility to Apply

All Discretionary Grant Programs

- **Must be a 501(c)3 or Fiscally Sponsored organization serves Greater Philadelphia (Bucks, Chester, Delaware, Montgomery, & Philadelphia counties in PA and Burlington & Camden in NJ)**
- **If fiscally sponsored by a 501(c)3 nonprofit, applicant must have an advisory Board separate from its fiscal sponsor's Board**
- **Must employ at least one full time equivalent staff person**
- **Organizations must support BIPOC and other historically marginalized and under-invested communities, with at least 70% of participants qualifying as low income**
- **Statewide or national organizations must demonstrate at least 75% of budget raised locally and have an advisory board in the service area**
- **Cannot have deficits greater than 10% of operating budget in the past year.**
- **Organizations may only submit one application for Discretionary Grants per calendar year. Applicants may apply for only one grant bucket, either Direct Services, Impact, Leadership, Advocacy, or Fund for Children.**

Eligibility to Apply *(continued)*

For Fund for Children & YOUTHadelphia

- Sole focus on significant services to children and youth up to age 18
- Programs must be based in Philadelphia and serving children and youth in Philadelphia
- 70% of the youth served are living in the lowest income and most under-resourced communities in Philadelphia

Ineligible Organizations

- Are not located in or serve a constituent base outside of the geographic area served by PF
- Cemeteries
- Umbrella funding organizations
- Schools (K through 12)
- Colleges and university academic or organizational (general purpose) departments
- General childcare agencies
- Government agencies
- Libraries
- Programs housed in universities that raise less than 75% of their funding.
- Local chapters of national organizations that raise less than 75% of their funding.

Common Elements Across All Discretionary Grants

- **Responsive to Community**
 - Deep knowledge and connection to targeted population(s)
 - Ongoing mechanisms to gather input and feedback to shape services
- **Transformative Lens**
 - Services driven by a clear theory of change that connects activities to desired changes with an eye to long-term impact for participants and an understanding of structural factors that may impede success
- **Diversity, Equity, and Inclusion**
 - Action taken at organizational and program levels to operationalize equity, including representation that reflects the community served, creating safe and welcoming spaces, working from an intersectional lens, sharing power in decision-making, and addressing structural barriers

Discretionary Grantmaking Advocacy

- Advocacy Unrestricted Grants are available on a competitive basis for nonprofits utilizing advocacy and/or community organizing best practices toward policy, regulation or legislative change on behalf of marginalized and low-income communities in Greater Philadelphia.
- Successful applicants will demonstrate a track record of identifying community issues of concern and the specific policies reinforcing these issues, implementing activities challenging these policies and practices and a history of making change.
- Greater Philadelphia (Bucks, Chester, Delaware, Montgomery and Philadelphia counties in PA and Burlington and Camden counties in NJ). Organizations must support Black, Indigenous, and people of color (BIPOC) and other historically marginalized and under-invested communities and demonstrate operationalized equity.
- **STRONG PRIORITY GIVEN TO:** organizations able to demonstrate that at least 70% of those they serve or represent are low-income and are considered marginalized.

Discretionary Grantmaking

Direct Service/General Operating

- Organizational Board and Leadership reflect the demographics of the community served, or have made significant strides to increase representation
- Diversity, Equity, and Inclusion (DEI) work that has moved from reflection to action stage, with substantial activity at the governance and management levels
- Recent strategic plan or process underway, ideally that integrates a DEI lens and sharpens the organization's strategic theory of change
- Organizational best practices in use, including focus on being a positive place to work, regularly gathering and responding to participant and partner feedback, and using data to improve and refine services

Discretionary Grantmaking Impact/Program

- For program related activities in nonprofits serving high-poverty populations in Greater Philadelphia
- Applicant demonstrates results-oriented programming including a track record of successes and proven outcomes for low-income communities.
- Successful applicants use trauma informed, strength and racial equity-based policies and practices in program development and deliver.
- **Pilot programs** will only be considered if your organization can demonstrate prior success in delivering outcomes-based programs in the past two years and achieved desired goals for targeted populations.

Discretionary Grantmaking Leadership

- To increase measurable skills and racial diversity of pipelines for senior staff and board of nonprofits
- To strengthen the capacities of nonprofit leaders in the areas of governance, planning, civic engagement, board and staff development and diversity, equity and inclusion
- To support leadership transition and increase the diversity of senior staff leadership
- Typically, a single year of funding for a specific effort – it is rare to receive leadership support for more than one year. In general, we expect to see that the organization has used its existing resources (and as appropriate, accessed the Key Skills Hub) before applying for this fund.

Discretionary Grantmaking Fund for Children

- The Fund For Children (FFC) was established in 2001 from the lease agreement with the City of Philadelphia: a \$2-million annual investment from the Eagles and the Phillies
- FFC is focused on improving the quality of life for the children of Philadelphia, especially, but not exclusively in high-poverty neighborhoods
- Programs funded through the FFC place a high value on youth voice and youth participation
- Priority is given to organizations able to demonstrate that at least 70% of those they serve or represent live in the most disadvantaged/under-resourced neighborhoods



Important Considerations

All Discretionary Grant Programs

- Priority funding to organizations led by BIPOC chief executives and/or board chairs
- Organizations operating less than 3 years must provide executive summary of Board approved strategic plan and if available - organization logic model.
- Generally, the Philadelphia Foundation does not use discretionary dollars to support organizations where there are familial relationships across the board and staff.
- The following policies should be in place, as indicated in the Part VI, Section B of the Form 990.
 - Conflict of Interest Policies
 - Whistleblower Policy
 - Independent process with comparability data for determining compensation
 - Providing copy of the 990 to board members prior to filing

Application Process and Supporting Documents

Nonprofits that meet basic eligibility requirements may complete the online application and upload supplemental documents including:

- 501(c)(3) IRS determination letter
- List of Board of Directors
- Most recent Audit (if your organization does not have audits, we will accept your IRS 990 or Profit Loss Statement)
- Current PA Bureau of Charitable Organizations Certificate
- Executive Summary of current strategic plan
- Board-approved Nondiscrimination Policy
- Organizational Budget/Project Budget if specified
- Organizations with Interim ED's - Board approved hiring and on-boarding plan for permanent Executive Director.

Application Due Dates

The applications portal is open:

- Fall 2023 - applications will be due in early September 11th by 11:59 PM

Other Available Grants, Special Initiatives & Scholarships

The Henrietta Tower Wurts Memorial - A charitable foundation formed to carry out the wishes of Henrietta Tower Wurts, who passed away in 1933. Supports nonprofits serving children and youth and/or the elderly in the City of Philadelphia. [WEBPAGE](#) Currently Accepting Applications; Deadline is 9/1/23

The Edna W. Andrade Fund A Donor Advised Fund of the Philadelphia Foundation, supports grants for local or national museums or nonprofit art organizations to benefit visual fine artists from Greater Philadelphia. [WEBPAGE](#)

Forman Family Fund Supports Greater Philadelphia nonprofits serving young people aged 11 to 18 offering in-school or out-of-school-time programs that address one of the following areas: Photography, Architectural Drawing and Architecture, Written Arts. [WEBPAGE](#) Currently Accepting Applications; Deadline is 9/11/23

GSK IMPACT Awards for Greater Philadelphia

Annually honors up to ten local nonprofit organizations with \$40,000 each in recognition of their exceptional achievements, overall excellence and best practices in contributing to a healthier Greater Philadelphia Region. [WEBPAGE](#)

Other Available Grants, Special Initiatives & Scholarships

Art Works

Art Works is a \$3-million grant program for community-based organizations and emerging artists that is designed to support arts, culture and creativity — particularly those working with BIPOC (Black, Indigenous and people of color) individuals and those in other under-served communities. [WEBPAGE](#)

Black Community Leaders Fund

Supports organizations that are Black-led (chief executive or board chair identifies as Black), that have demonstrated commitment to Black inclusion and leadership and that serve predominantly Black communities. [WEBPAGE](#)

Next Round to Open in September 2023

Other Available Grants, Special Initiatives & Scholarships

Brook J. Lenfest Foundation Grants Letters of Inquiry/Applications Spring 2023

A charitable foundation established by Brook J. Lenfest in 2000, that supports programs operating in the Greater Philadelphia region, with an emphasis on youth development and Philadelphia. Priority funding to education and job training programs that successfully prepare participants to earn a family sustaining income and can demonstrate concrete impact data . [WEBPAGE](#)

District Attorney's Office Anti-Violence Grants

Supports community-based anti-crime or –narcotics organizations and programs. Funds will be directed to activities that engage at-risk youth including afterschool programs which work explicitly to build skills that can counter violence or addiction, programs aimed at preventing violence or addiction, addiction recovery and rehabilitation programs , and/or programs focused on reintegration and finding gainful employment after imprisonment. [WEBPAGE](#)

Key Skills Hub

The **Key Skills Hub** is a marketplace for volunteerism where the community and the corporate sector of Philadelphia meet to work towards improving the quality of life of our neighborhoods, our city and beyond.

Greater Philadelphia nonprofits can sign up for free support from a broad range of skills-based volunteer professionals. [Key Skills Hub Webpage](#)

Next Key Skills
Hub Demo
8/10/23



KEY SKILLS HUB DEMO – AUGUST

FREE

- 📅 THU., AUGUST 10, 2023
- 🕒 3:00 P.M. TO 3:45 P.M.
- 📍 VIRTUAL

 **KEY SKILLS HUB**

Learn How to Access Talented Volunteers to Meet Immediate and Long Term needs The Key Skills Hub is Philadelphia Foundation's marketplace for volunteerism, where the community and corporate sector meet to work toward improving the quality of life in our neighborhoods, our city and throughout Greater Philadelphia. The resource functions simply: you share [...]

[READ MORE](#)

Scholarships

Funds established by generous individuals, families, businesses and organizations to ensure that local students can pursue their educational dreams.

- Open applications for 24/25 school year – Opening in February 2024
- Additional scholarships and resources on website. Follow this link <https://www.philafound.org/students/apply-for-a-scholarship/>
- Additional information: kgilmore@philafound.org / 215-863-8117

Q&A

FOR MORE INFORMATION AND TO APPLY:

- Visit <https://www.philafound.org/nonprofits/>

QUESTIONS:

- Submit any additional inquiries to grantmakingservices@philafound.org

[Link to FAQs](#)