

2024

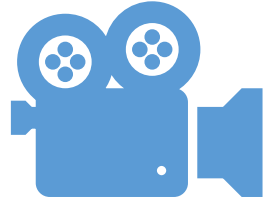
PHILADELPHIA  
FOUNDATION

INFORMATION SESSION

Competitive  
Grantmaking –  
STEP 2



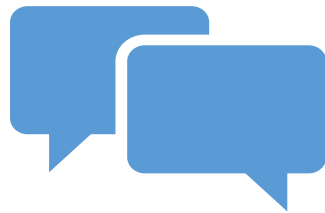
# Logistics



Session is being recorded & will be posted on PF website



Mute Microphone



Utilize chat box



No social media

01

**WELCOME & STAFF INTRODUCTIONS**

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**APPLICATION PROCESS**

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**Q&A**

# Philadelphia Foundation – Staff Names, Link to Emails

## LEANN AYERS

*Director,  
Grants and Programs*  
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 Names, Link to Emails

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

# Competitive Grantmaking Process

To better align prospective grantees with the grant categories where they stand the greatest chance of success, we have made some minor changes to our traditional process.

**All grant categories, requirements and funding levels remain the same as in prior years.**

We have essentially broken our traditional process into two steps:

**Step 1:** we will collect basic information from grantees (all the information that previously comprised the first half of our application). Our team will then review your organization's information and invite you to apply for grants in the category(ies) where your application will be most competitive. This process opened on February 9, 2024, and close on March 1, 2024.

**Step 2:** completing the rest of the grant application. The invitation received following step one will include a link to the second part of the application. It will open on March 8, 2024, and close on March 29, 2024. **The link is exclusive to your application PLEASE DO NOT SHARE IT**

## Competitive Grantmaking – Special Initiatives

**The Henrietta Tower Wurts Memorial** - A charitable foundation formed to carry out the wishes of Henrietta Tower Wurts, who passed away in 1933. Grants averaging \$2,000 to nonprofits serving children and youth and/or the elderly in the city of Philadelphia.

**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. In 2024 there will only be one cycle this Spring.

**GSK IMPACT Awards for Greater Philadelphia** - Annually honors up to ten local nonprofit organizations with \$50,000 each in recognition of their exceptional achievements, overall excellence and best practices in contributing to a healthier Greater Philadelphia Region.

# Competitive Grantmaking Application

## ‘Step 2’

- This is essentially the second half of our traditional applications and will be no more than 4-5 questions. All data entered in step 1 will be pre-populated and grantseekers can rest assured that you are applying in the most appropriate categories. ([GSK Impact Awards for Greater Philadelphia will have a different deadline: Eligible organization will receive their application directly and they will be due on April 26, 2024](#))

APPLICATION PROCESS	OPENING DATE	CLOSING DATE	INFO SESSION WEBINAR
Competitive Grants ADVOCACY, DIRECT SERVICE, FUND FOR CHILDREN, IMPACT & LEADERSHIP	March 8, 2024	March 29, 2024	March 14 From 11am -12 pm
Henrietta Tower Wurts Memorial Forman Family Fund	March 8, 2024	March 29, 2024	



## Competitive Grants General Info

You should have received a personalized link to complete and application in one of our categories:

- Advocacy - unrestricted grants available to organizations addressing policy changes with a particular emphasis on racial and social justice. Supporting advocacy and community organizing best practices to bring about legislative, regulatory, program or policy change on behalf of marginalized and low-income communities in Greater Philadelphia
- Direct Service - 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
- Fund for Children - unrestricted grants for Philadelphia-based youth organizations whose missions prioritize youth leadership, civic engagement and youth organizing activities and outcomes

# Competitive Grants General Info - Continued

- Impact - program grants available to not-for-profits organizations that demonstrate specific and clear impact of a program they run
- Leadership - project grants available to assist not-for-profits with transitions with a special focus on racial diversity of pipelines for executives and boards of nonprofits; and to strengthen organizational capacity and nonprofit leadership in the areas of governance, planning, civic engagement, board and staff development and diversity, equity and inclusion

# Competitive Grantmaking Process – Invitation to Apply

Invitation to Apply for 2024 FUND FOR CHILDREN Strategic Investment in Youth Application



automated.email@smarterselect.com

To Angie Pabon

If there are problems with how this message is displayed, click here to view it in a web browser.

**CAUTION: \*\*This email has been received from outside PF – Think before clicking on links, opening attachments, or responding.\*\***

## PHILADELPHIA FOUNDATION

Dear Angie Pabon,

You have been invited to complete an application for **2024 FUND FOR CHILDREN Strategic Investment in Youth Application**

To access your application, click here:

<https://app.smarterselect.com/programs/95274-Philadelphia-Foundation/invites/91f5890e679dfd212f2240030f674853>

This link will take you directly to your own application with the program and will not work for anyone else.

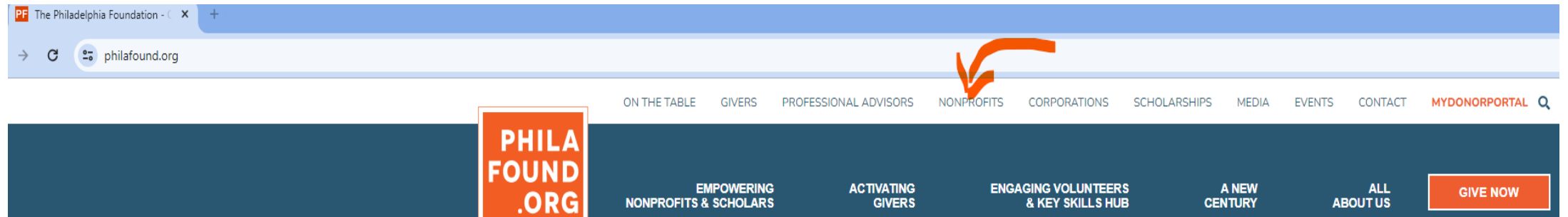
Thank you,  
PHILADELPHIA FOUNDATION

This is an automated e-mail message - Please do not reply.

For assistance, please contact Angie Pabon at [apabon@philafound.org](mailto:apabon@philafound.org).

PHILADELPHIA FOUNDATION  
1835 Market Street  
Suite 2410  
PHILADELPHIA, PA 19103  
United States

# Competitive Grantmaking Process - Reporting



Use link from the website:

<https://www.philafound.org/nonprofits/apply-for-a-grant/grant-reporting-requirements/>

# Competitive Grantmaking Process - Reporting

## GRANT REPORTING REQUIREMENTS

### WHO IS REQUIRED TO SUBMIT A REPORT?

- All discretionary and special initiatives grantees need to submit the report that applies to their funding stream (for example, direct services grant) at the end of the grant period.
- Recipients of a designated grant exceeding \$5,000 should submit together a financial report and a grant report on or before the due date specified in the grant award letter.
- Fund For Children grantees should submit together a financial report and a grant report on or before the due date specified in the grant award letter.

If for any reason you are unable to provide the report by the required date, contact [grantmakingservices@philafound.org](mailto:grantmakingservices@philafound.org) to request an extension.

### INSTRUCTIONS

1. Select the report you need to submit.
2. Download the financial report template (where applicable) and fill in the financial information for the previous year (fiscal year in which the grant was received).
3. Upload the financial report as an attachment to the form for your funding stream in SmarterSelect.

Note: The Budget Report is a separate Excel file that requires you to provide line item details for income and expense. A link to the budget reporting template can be found on grant report form

### REPORTS

[Advocacy Program](#) – Due at the end of grant period

[Advocacy Unrestricted Report](#) – Due at the end of grant period

[Designated Grant Report](#) – Due at the end of grant period

[Direct Service Report](#) – Due at the end of grant period

Forman Family Fund Report – Due at the end of grant period

[Fund For Children Report](#) – Due at the end of grant period and must be submitted before applying for a new grant.

Henrietta Tower Wurts Memorial Foundation Grant Report – Please submit a one-page report describing how the funds were used and the impact the grant has had on the organization.

# Competitive Grantmaking Process – Example of a report submission

## FUND FOR CHILDREN GRANT REPORT

[Update Application](#)[App Actions](#)[Back to Apps](#)

### Applicant Information

Name: Angie Pabón

Email: [apabon@philafound.org](mailto:apabon@philafound.org)

App ID: 04303793

Status: Incomplete

Cycle: None

Last Modified: Oct 20 2023 15:46 EDT by apabon@philafound.org

App Submitted:

App Created: Oct 20 2023 15:46 EDT by apabon@philafound.org

Last IP Address: 34.120.172.148

## 1. GRANT REPORT

### Instructions

This report is required from all grantees who have received a Fund For Children grant. You are required to complete this form and attach the required documents. In order to access your report later, you will need your login information. The reports submission process is not finished until all required fields are completed, supplemental documents uploaded (where applicable) and the form e-submitted. Once your report is e-submitted, it is locked and you will not be able make any changes. All questions with an asterisk (\*) require a response to move forward; however, you may go back to previous questions to make changes. Grant reports are due 30 days after the end of the grant period.

## Competitive Grantmaking Process – Report submission continued

### FUND FOR CHILDREN GRANT REPORT

#### Organization & Contact Information

Legal Name of Grantee Organization \*

Program Name: \*

Grant Number (found on grant letter) \*

Award Date (found on grant letter) \*

Grant Amount \*

Grant funds expended-to-date \*

Balance-on-hand \*

Contact Person for this grant \_ \*

Telephone Number of contact person \*

E-Mail of contact person \*

## Competitive Grantmaking Process – Report submission continued

### FUND FOR CHILDREN GRANT REPORT

#### Report Questions

Please respond to the following questions. Additional photos, annual reports, etc. may accompany the report.

1. Briefly describe the youth served by the funded program, the activities the youth participated in during the grant period, and the outcomes of their participation in the funded program. \*
2. Describe any changes or growth in the level of youth engagement within your organization. \*
3. Explain any challenges encountered and how they were addressed. Note significant organizational changes that occurred during the year; e.g., staff changes, membership growth. \*
4. Story of impact: Provide a short description of how the funding impacted the life of an individual you serve or otherwise made a difference to your organization. Responses should be 150-250 words. You are invited to submit photos or images electronically with your report form.\*



## Competitive Grantmaking Process – Report submission continued

### FUND FOR CHILDREN GRANT REPORT

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#### Attachments

##### 5. Report Budget Form

Please report on the approved project budget. Attach appropriate detail documents if necessary.

You may use the [report template here.](#) \*

##### 6. Enclose the most recent financial information from your last fiscal year, i.e. IRS 990 or audit. \*

##### 7. Photos or Images

##### 8. Additional Attachments

---

# About Your Grant Application

- **Shows progress along a Diversity, Equity, and Inclusion (DEI) continuum**
- **Shows responsiveness to community needs**
- **Aims to provide services through a transformative lens**
  - Your organization uses a theory of change that connects activities to desired changes with an eye to long-term impact for participants

# About Your Grant Application

## • Operationalized Equity Rating Rubric

	Strong (11 – 20)	Adequate (6 – 10)	Inconsistent (1 - 5)
<p><b>Operationalized Equity (20pts)</b>  <i>Applicant recognizes and works to counter the impact of both structural racism and personal bias on nonprofit services and org. management.</i></p>	<ul style="list-style-type: none"> <li>• Organization integrates an intersectional lens to its racial equity work.</li> <li>• Organizations are focused on systems to improve race equity.</li> <li>• The primary goal of organization is <u>the</u> integration of an intersectional lens into all aspects of the organization. This involves internal and external systems <u>change</u> and regularly assessing processes, programs, and operations through a race equity lens.</li> <li>• Leadership at all levels of the organization understand the benefits of equity work for the effectiveness of the organization’s mission and social change capacity.</li> <li>• Organization regularly solicits constituent feedback to shape organization structures, programming, and organization strategy.</li> </ul>	<ul style="list-style-type: none"> <li>• Organization is focused on culture and creating an environment where everyone is comfortable sharing their experiences and everyone is equipped to talk about race equity and inequities.</li> <li>• Organization’s primary goal is inclusion and internal change in behaviors, policies, and practices.</li> <li>• Some in the organization understand the benefits of this work for the organization’s mission and social change capacity.</li> <li>• Organizations rarely solicit constituent feedback around equity to shape programming and organization strategy.</li> </ul>	<ul style="list-style-type: none"> <li>• The primary goal is representation, with efforts aimed at increasing the number of people of different race backgrounds in the organization.</li> <li>• Staff and Leadership do not agree on the benefits of this work and to what extent this work should look like institutionally.</li> <li>• Organization does not solicit constituent feedback around equity to shape programming and organization strategy.</li> </ul>

## STEP 2 Application Process and Additional Supporting Documents

Nonprofits have met basic eligibility requirements at the completion in STEP 1  
Applications for the following require the following:

APPLICATION	ADDITIONAL INFORMATION NEEDED	ADDITIONAL DOCUMENTS
Impact Competitive Grant Leadership Competitive Grant	Provide a project budget	
Direct Service Competitive Grant	Provide an executive summary	Strategic Plan
Forman Family Fund	Provide a project budget FS MOU	Include curriculum and images
Henrietta Tower Wurts Memorial	Provide a project budget	

# Application Due Dates

APPLICATION PROCESS	OPENING DATE	CLOSING DATE
Competitive Grants ADVOCACY, DIRECT SERVICE, FUND FOR CHILDREN, IMPACT & LEADERSHIP	March 8, 2024	March 29, 2024
Henrietta Tower Wurts Memorial Forman Family Fund	March 8, 2024	March 29, 2024
GSK Impact Awards for Greater Philadelphia	Eligible organizations will be sent application instructions by March 29, 2024	April 26, 2024

## Scholarships

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

- **Applications are now open for 2024-25 school year**
- Deadline: May 13, 2024
- Additional scholarships and resources on website. Follow this link <https://www.philafound.org/students/apply-for-a-scholarship/>
- Additional information: [kgilmore@philafound.org](mailto:kgilmore@philafound.org) / 215-863-8117

## Key Skills Hub

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

The Hub provides access to a CATCHAFIRE tech platform that connects Greater Philadelphia nonprofits to free support from a broad range of skills-based volunteer professionals.

Additional information: [apabon@philafound.org](mailto:apabon@philafound.org)

# Q&A



## FOR MORE INFORMATION AND TO APPLY:

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

## QUESTIONS:

- Submit any additional inquiries to [grantmakingservices@philafound.org](mailto:grantmakingservices@philafound.org)