

# Thriving People. Vibrant Places.



**The Boston  
Foundation's  
Grant  
Guidelines**

## About the Boston Foundation

The Boston Foundation, Greater Boston's community foundation, is one of the oldest and largest community foundations in the nation, with assets of \$695 million. The Foundation is made up of some 900 separate charitable funds established by donors either for the general benefit of the community or for special purposes. The Boston Foundation also serves as a major civic leader, provider of information, convener, and sponsor of special initiatives designed to address the community's and region's most pressing challenges.

## Mission

As Greater Boston's community foundation since 1915, the Boston Foundation devotes its resources to building and sustaining a vital, prosperous city and region, where justice and opportunity are extended to everyone. It fulfills its mission in three principal ways:

- » Making grants to nonprofit organizations and designing special funding initiatives to address this community's critical challenges;
- » Working in partnership with our donors and other funders in pursuit of mutual goals; and
- » Serving as a civic hub and center of information where ideas are shared, levers for change are identified and common agendas for the future are developed.

## Value Statement

In everything we do, we seek to broaden participation, foster collaboration and heal racial, ethnic and community divisions.

## Grants to Nonprofits

In keeping with its mission, the Boston Foundation makes both donor advised grants and discretionary grants—also called competitive grants—to nonprofit organizations. Individuals, families and organizations that have established Donor Advised Funds, which operate much like private foundations, decide on the issues and organizations that they want to support with their funds. These donor grants made up about 80% of the nearly \$79 million in grants from the Foundation in Fiscal Year 2008. *Donor Advised Funds are not open to requests for funding.*

Each year, the Boston Foundation also distributes about \$16 million from its Permanent Fund for Boston, an endowed pool of funds contributed by donors who want to see this community thrive. These discretionary grant funds are awarded through a competitive process through a variety of grantmaking programs that are open to requests from nonprofits serving or benefiting the people of Greater Boston. All grants are approved by the Foundation's Board of Directors.

## Priority Investments

The Foundation invests the majority of its resources in proven or promising organizations and initiatives that seek to deepen their impact or bring their work to scale and are significantly aligned with the strategies below the two major goals and five objectives below:

**Goal: Greater Boston residents are successful and thriving.**

**Objective: To improve outcomes for Boston's residents across the education pipeline, the Foundation will focus on three Principal Strategies:**

- » Accelerate structural reform and promote innovation in public schools in Boston;
- » Increase the 2- and 4-year college graduation rate for low-income, minority, and first-generation college students from public schools in Boston;
- » Promote the career advancement and economic security of low-income individuals.

**Objective: To increase the health and wellness of Greater Boston residents, the Foundation will focus for now on one Principal Strategy:**

- » Encourage healthy behaviors among Boston residents and increase access to healthy food and opportunities for physical activity.

**Goal: Greater Boston communities are vibrant, safe and affordable.**

**Objective: To increase the livability, affordability and safety of Greater Boston communities, the Foundation will focus on two Principal Strategies:**

- » Increase neighborhood stability and the production and preservation of affordable housing for vulnerable populations;
- » Reduce the incidence of violence in Boston neighborhoods, especially among youth.

**Objective: To enhance civic and cultural vibrancy in Greater Boston, the Foundation will focus for now on one Principal Strategy:**

- » Strengthen and celebrate the region's diverse audiences, artists and nonprofit cultural organizations.

**Objective: To increase job growth and economic equity and competitiveness in Greater Boston, the Foundation will focus on two Principal Strategies:**

- » Invest in strategies that increase Greater Boston's competitiveness, prosperity and efficiency, and create vibrant urban neighborhoods with opportunities for all residents;
- » Enhance the long-term vitality of the Massachusetts nonprofit sector.

While the Foundation focuses most of its competitive grants on organizations that are highly aligned with these objectives and strategies, the Foundation is also interested in innovative approaches to emerging community issues and makes targeted and more modest investments in such efforts.

## Competitive Grants

Three principal types of grants are considered through the Foundation's competitive grants process:

### General Operating Support Grants

The majority of the Boston Foundation's competitive grants are made to support the core operations of organizations with missions and activities that are highly aligned with the Foundation's priority strategies. The Foundation and nonprofit recipients of General Operating Support Grants work and learn together as strategic partners to achieve better, measurable outcomes.

General Operating Support Grants are generally up to \$150,000 or 10-15% of an organization's operating budget, whichever is lower, and may be awarded for up to five years. Applicants for these multi-year grants must have a current strategic or business plan that clearly articulates the organization's goals and presents a clear plan for achieving results.

### Project Support Grants

The Foundation makes grants to support specific projects or programs that are highly aligned with the Foundation's priority strategies. This includes programs that meet community needs as well as capacity building activities that will enhance the agency's ability to meet its mission, increase its scale or manage and deliver services more effectively. Or, project grants may support programs that are embedded within multi-service organizations or larger institutions, such as hospitals or universities that, in their entirety, may not be completely aligned with the Foundation's objectives and strategies.

Project Support Grants vary in size and duration as well as the percentage of project costs covered, but in general range from \$25,000 to \$100,000 to be applied to project budgets that include an appropriate amount of overhead. Project Support Grants are most often one-year awards, but in certain cases may be awarded as multi-year grants.

### Special Opportunity Grants

The Foundation provides an open door to new ideas for tackling long-standing or emerging problems in our community that may or may not be directly aligned with our priority strategies. The Foundation allocates a limited amount of funding each year to provide seed funding or capacity building support for such efforts. Special Opportunity Grants may support either the general operations of the applicant organization or a specific project and are typically one-year investments in the \$15,000 to \$50,000 range.

## The Competitive Grants Process

All competitive grants—General Operating Support Grants, Project Support Grants and Special Opportunity Grants—follow the same application process.

- 1. Letter of Inquiry:** The application process for General Operating and Project Support grants begins with the submission of an online Letter of Inquiry (LOI), which is accepted and reviewed on a rolling basis. As part of the process of reviewing an LOI, a Foundation staff member may request a telephone conversation, meeting or site visit. Staff will determine whether or not the Foundation will request a full application within eight weeks after submission of an LOI. (Please note that because of the anticipated high volume of Letters of Inquiry following the announcement of the Foundation's goals and objectives, the response time may be somewhat longer through 2009.)
- 2. Full Grant Application:** Full applications are accepted only from organizations that are invited to apply after a review of their LOI. Organizations that are invited to submit a full proposal will be assigned a program officer who will work with the applicant to build its request file. Please note that although the required materials for competitive grants are similar, requests for *operating support will not be considered without a current strategic or business plan that articulates the organization's goals and intended outcomes and outlines a plan for achieving them.*
- 3. Review and Evaluation:** As part of a comprehensive due diligence process, the assigned program officer – often joined by additional Foundation staff – will conduct a site visit and may also contact board members, clients, the leadership of collaborating or similar organizations, and other funders to become better acquainted with the organization.
- 4. Grant Decisions:** The Foundation's Board of Directors, which meets quarterly – in March, June, September and December – makes grant decisions based on staff review, research and recommendations. Once your request file is complete, staff members will strive to present their recommendation to the Board at its next meeting. Most applications that are complete eight weeks in advance of the scheduled meeting will be presented at that time. Foundation staff will notify the applicant of the Board's decision and up to one year of the grant award will be paid shortly after each meeting.
- 5. Annual Review:** Funded organizations report annually on progress toward the goals and outcomes established in collaboration with their program offer before subsequent payments on multi-year grants are released.

## Key Criteria

The Boston Foundation invests substantial resources to help proven or promising nonprofits that share its core values and are highly aligned with its priority strategies to deepen their impact or bring their work to scale. To maximize the impact and effectiveness of its investments, the Foundation puts significant weight on the following criteria:

- » **High-Need People and Places:** The Foundation engages in policy, research, grantmaking and other efforts to positively affect the Greater Boston region and all of its residents. However, with its limited competitive grantmaking resources, the Foundation has a particular focus on efforts that unlock economic and educational opportunity for underserved residents and neighborhoods, especially within the City of Boston. When a particular strategy specifies Boston, it means that the Foundation focuses its resources within the City of Boston. When an objective refers to Greater Boston, then funding may be directed to populations and activities within any of the cities and towns within the Foundation's funding area.
- » **Collaboration:** Complex, long-standing problems require creative, multi-disciplinary approaches that are often beyond the capacity of a single organization. The Foundation is most interested in supporting organizations with a track record of collaboration and collaborative groups of agencies working together to address significant community needs. Nonprofits that are part of a collaborative effort supported by the Foundation may also seek funding for their individual operations or projects.
- » **Financial and Programmatic Capacity:** Successful applicants will show evidence that they are stable, have a solid financial and program management team, a strong balance sheet and program plans that give the Foundation confidence that their work will be sustained beyond the Foundation's investment.
- » **Leadership:** Successful applicants will have strong board and executive leadership that are collaborative and knowledgeable about the community and the field in which they operate.
- » **Measurable Results:** The Foundation places a high priority on organizations that are able to clearly articulate organizational goals, present a clear plan for achieving results, and track outcomes and impact on the people and communities served.



## Other Grants Programs

In addition to Competitive Grants, the Foundation makes grants and strategic investments through several other grantmaking programs that have varying purposes and application processes.

### Initiative Grants

A significant amount of the Foundation's grants funds are distributed through initiatives, which seek to address a well-defined issue or need. These funds are often distributed through competitive Requests for Proposals (RFPs). See our website for a complete list of current initiatives; please note that not all initiatives are open to application.

### Vision Fund Grants

The Foundation makes Vision Fund Grants to support activities and organizations that advance the Foundation's mission and keep the Foundation informed of the work of a broad range of organizations, especially those that may not currently be competitive for larger grants. These grants of up to \$7,500 are awarded to organizations for special projects, programs and activities or for work that builds the management capacity of the applicant nonprofit. Organizations that are currently receiving Foundation support through the competitive or initiative funding process are generally not eligible for Vision Fund Grants. See our website for details on the application process and online form.

### Sponsorships

Each year, the Boston Foundation devotes some of its resources to supporting special events mounted by nonprofit organizations, such as luncheons, dinners or other fundraising opportunities. These sponsorships are another way for the Foundation to support nonprofit organizations of all sizes in Greater Boston and for foundation staff to take part in community events. All Greater Boston area nonprofit organizations are eligible to submit sponsorship requests to the Vice President for Communications, Community Relations and Public Affairs.

### Out of the Blue Grants

The Boston Foundation's Board of Directors awards several Out of the Blue grants to exemplary nonprofits each year. These unrestricted one-time grants of \$100,000 recognize exemplary organizations that have an impressive history of accomplishment, have demonstrated effective, collaborative community leadership and are directed by strong, stable executive and volunteer leadership. This funding is awarded at the discretion of the Board based on staff recommendation and is **not open to application or inquiry**. Please see our website for a list of Out of the Blue Award recipients.

## Tips for Writing Narratives

- » **Provide details.** Numbers are more informative than adjectives. How many people are currently being served and how many more people will be served with grant funding? What other funders support this work? How many individual donors do you have?
- » **Be clear and concise.**
- » **Create a compelling narrative.** Begin with a brief introduction, elaborate on key points, and conclude by connecting each point to a statement of impact. The Letter of Intent (LOI) form and most RFP applications have six different narrative questions, which are good building blocks for a sequential narrative essay.
- » **Stories** or quotes from clients are welcome and can bring some heart to your LOI. The best story illustrates the impact of your organization or program without being sentimental.
- » **200 words** is about ½ a single-spaced page, which should be long enough to make your case, but not so long as to burden the applicant or the reviewer.

## Exclusions

The Foundation does not make grants for capital construction costs, endowments, medical or academic research, scholarships, sectarian or religious purposes, or to support candidates for political office. Except for its Brother Thomas Fellowship Awards for artists selected through a bi-annual nomination and panel process, the Boston Foundation does not make grants to individuals.

## Eligibility

To be eligible for support, an organization must be tax-exempt or operate under the fiscal sponsorship of a tax-exempt nonprofit. In addition, the nonprofit must be primarily serving the people of Greater Boston, with the exception of regional, statewide or national public policy efforts that may benefit a substantial portion of the Greater Boston community. Finally, an eligible organization must be operated and organized so that it does not discriminate in the hiring of staff or provision of services on the basis of race, religion, gender or gender identity, sexual orientation, age, national origin or disability.

In general, organizations are not eligible to receive more than one type of funding from the Foundation concurrently. Nonprofits that are part of a collaborative effort funded by the Foundation may also seek funding for their individual operations or projects.



Organizations that are denied funding through a competitive or initiative grants process may not re-apply until 12 months after its most recent denial letter from the Foundation. Organizations that have received a multi-year grant will generally be expected to take at least a year off before submitting another application.

Please note that because of the high volume of applications and our own specific mission and goals, the Foundation is unable to fund all the high quality requests submitted for consideration.

### **For More Information**

The Boston Foundation holds regular informational sessions about its priorities and guidelines. The schedule can be found on our website. If you have any questions after reading these guidelines, please contact the Foundation for additional information and advice. Contact your program officer or email us at [grantsinfo@tbf.org](mailto:grantsinfo@tbf.org) with a brief summary of your question. A member of the Foundation staff will respond within two working days.

For more information, please visit [www.tbf.org](http://www.tbf.org) and choose **Grant Seekers**. There you will find detailed information about the specific strategies the Foundation uses to achieve our goals and objectives as well as more information about how to apply for a grant.

## Frequently Asked Questions

Each year, the Foundation distributes about \$16 million from its Permanent Fund for Boston through a variety of grantmaking programs. These programs are open to requests from proven and promising nonprofits that benefit the people of Greater Boston. We endeavor to make our grants processes as understandable as possible. If you have any remaining questions after reading the guidelines and these Frequently Asked Questions, please contact us at [grantsinfo@tbf.org](mailto:grantsinfo@tbf.org).

### **Q What kind of grant can I apply for?**

**A** Any organization that is tax-exempt or operates under the fiscal sponsorship of a tax-exempt nonprofit, serves the people of Greater Boston and does not discriminate in the hiring of staff or provision of services is eligible to apply to most of the Foundation's grant programs. However, the type of grant your organization will be most competitive for will vary based on the services you provide and their potential for impact on one or more of the Foundation's priority strategies. The Boston Foundation considers three principal types of requests through the competitive grants process: General Operating Support Grants, Project Grants and Special Opportunity Grants. Large, multi-year Operating or Project Grants are reserved for those organizations or activities that will have a significant direct impact on Foundation priorities. The Foundation supports new ideas or new organizations that may or may not be aligned with our priority strategies through Special Opportunity Grants.

The Foundation's Initiative grantmaking is highly targeted to particular issues or needs. Initiatives have varying guidelines, deadlines and application processes; please review our website carefully and contact Foundation staff with any questions. Vision Fund Grants are only open to those organizations that have not received Foundation support through another program within the last year, but that do work addressing our mission to "build and sustain a vital and prosperous city and region where justice and opportunity are extended to everyone." Finally, the Boston Foundation puts some funds aside to provide sponsorship support for the special events of organizations that meet critical community needs.

The Boston Foundation welcomes inquiries and applications from eligible nonprofits serving the people of Greater Boston. However, because of the high volume of requests and limited resources, we are unable to fund all of the high quality requests submitted for consideration.

### **Q How do I know if my organization will be competitive for a general operating support grant? It is eligible, but is it worth our time to prepare a Letter of Inquiry?**

**A** The Boston Foundation will make very few General Operating Support Grants. Organizations that are most likely to be successful in the highly competitive process will

operate programs that have a direct impact on one or more of our core strategies, have strong, consistent leadership and a solid financial position. The successful organization must have a current strategic or business plan that presents a clear plan for achieving results over the next three to five years. If you have any doubts about your organization's competitiveness, please contact your program officer or email [grantsinfo@tbf.org](mailto:grantsinfo@tbf.org).

**Q My organization's mission and activities address more than one of the Boston Foundation's priority strategies. What should I do?**

**A** The Foundation will accept Letters of Inquiry (LOI) for Project Support or Special Opportunity Grants from multiservice agencies as well as universities with multiple colleges or hospitals with many departments. Project Support or Special Opportunity Grants are focused narrowly on a specific aspect or activity of the larger agency. Multiservice organizations may also request a Project Support Grant for the core or general operations of a discrete part (department, college or institute) of the larger agency. These requests are reviewed under the same competitive process and criteria as those from single-purpose agencies. If you have questions about the competitiveness of your organization or its activity or project, please contact your program officer or email [grantsinfo@tbf.org](mailto:grantsinfo@tbf.org).

**Q My organization's mission and activities don't address any of the Boston Foundation's priority strategies. What should I do?**

**A** The Boston Foundation has an active interest in innovative approaches to emerging community issues and will make targeted investments in such efforts whether or not they address a particular strategy. Special Opportunity Grants will provide seed funding or capacity building support to promising new organizations or projects that may or may not be directly aligned with the Foundation's priority strategies. In some cases, Initiative Grants, distributed through a competitive Request for Proposal (RFP) process, may be directed toward activities that don't directly address Foundation strategies. Finally, Vision Fund grants are open to applications from organizations that may not be competitive for other funding. Foundation staff welcomes the opportunity to review a broad range of community organizations; however, we are unable to fund all the high impact organizations or quality requests that are submitted for consideration.

**Q My nonprofit has never received a grant from the Boston Foundation and does not have a program officer. Can we apply? Who can I talk to?**

**A** The Boston Foundation welcomes applications and inquiries from any nonprofit (or organization operating under the fiscal sponsorship of a tax-exempt nonprofit) that serves the people of Greater Boston or conducts public policy efforts that may benefit a substantial portion of the Greater Boston community and that does not discriminate in the hiring of staff

or provision of services. In fact, the Vision Fund is designed to keep the Foundation informed of the work of a broad range of the community's nonprofits, especially those that have not previously received funding or may not be competitive for larger grants. Please send us an email at [grantsinfo@tbf.org](mailto:grantsinfo@tbf.org) with a brief description of your organization and the specifics of your question; a member of the program staff will respond within two working days.

**Q Online application forms make me nervous. Can I submit a paper copy instead?**

**A** The Boston Foundation, like many other foundations, has moved to an online application process to reduce processing time and assure that our records are up to date and accessible to relevant members of our staff. We can serve you better with an online process and so will continue to require an online application for competitive and initiative grant requests. But here are some hints that may ease your worries.

Please carefully review all the questions before filling out the online application form. We strongly suggest that you use your word processor to prepare the long-text responses (e.g. Organization Description, Request Narrative), and then copy and paste your responses into the appropriate text boxes. This will save you the task of re-typing answers if there is a problem with your Internet browser and it will ease the task of editing the size of your narrative responses, should that be necessary.

Please do not format your type (do not use bold, italics, bullets, etc.). It takes up valuable space in the limited-size text fields. Once you press "Submit," your text will be converted to "plain text" and any formatting will be stripped away.

If you exceed the number of allowed characters and attempt to submit your online application, an automated warning will prevent you from continuing. If it appears that your text is under the maximum word limit and you still receive the error message, remove your paragraph line breaks (the "returns" between paragraphs) and indent each paragraph using the space bar. Once you reduce your text to the allowed level, click the "update" button at the bottom of the page and the warning should disappear.

Of course, please call us if you have specific questions.

**Q What can I expect if my organization is invited to submit a full proposal?**

**A** If a full application is invited, the assigned program officer— often joined by other Foundation staff — will conduct a site visit and will also contact board members, clients, the leadership of collaborating or similar organizations, and other funders to become better acquainted with the organization. We will also request additional information to build the application file. While requested information will vary, it will usually include:

- » Current strategic and program plans;
- » Detailed financial information;

- » Organizational chart and/or brief biographies of key staff;
- » List of the Board of Directors and/or advisory board;
- » References;
- » Arts/cultural organizations only – Massachusetts Cultural Data Project Funder Report for the Boston Foundation (see [www.massculturaldata.org](http://www.massculturaldata.org) for more information);
- » Out of school time organizations or activities only – a screen shot or printout of your organization’s listing on [www.BostonNavigator.org](http://www.BostonNavigator.org).

**Q I understand that the Boston Foundation also works with individual donors who make grants through the Foundation. How can I tell them about the work of my organization?**

**A** Individuals give through the Boston Foundation for many reasons. Donors find that it is convenient and cost effective to conduct their giving through the Foundation, since our staff makes philanthropy easy. Many want to give anonymously. Some donors want to be able to tap the expertise of our knowledgeable staff and participate in our *Understanding Boston* forums, which may lead them to co-invest in projects and organizations that the Foundation funds. However, to protect the privacy and respect the wishes of our donors, Donor Advised Funds are not open to application or inquiry.