

APPLICATION PROCESS & TIMELINE

PHASE I



Identify Organizations

We find organizations through various channels. In addition to accepting applications online, we proactively identify organizations that are aligned with our standards. Sources include referrals from other foundations and philanthropists, online publications, social media, industry research and thought leaders, conferences, etc.



Solicit a Letter of Inquiry

Organizations applying online: Once your application is reviewed and if determined for a potential fit, we will reach out to you to schedule a call or to solicit an official Letter of Inquiry.

Organizations proactively identified by the Foundation: We will reach out to you to schedule a call or request an official Letter of Inquiry.



Preliminary Organization Review

Based on our phone conversation or your LOI, we will evaluate your organization on the following categories:

- Mission, strategy, and programming
- Targeted constituency
- Organization capacity
- Impact

The most outstanding organizations will be presented to the board for review.

JAN

FEB

MAR

APR

MAY

JUN



Board Meeting

In July, the board will convene to consider all recommended organizations. Of these, the board will determine which organizations they wish to be fully vetted, in order to be voted on during the November board meeting.



Communicate Application Updates

By the end July, all organizations will be informed of their application status. If the Board has voted for the organization to be fully vetted, then next steps will be provided for the November Board meeting. Applications for all other organizations will be closed. These organizations will be eligible to apply again after at least one new grant cycle has passed.

PHASE II



Conduct Due Diligence

For those organizations being fully vetted, we will request an application answering specific questions and asking for various documents. After receiving your application, we will discuss via phone or via a site visit. Based on the information collected and additional research, each organization will be more thoroughly evaluated on the categories listed in Phase I and on their operations.

Each organization will identify their most important goals for the following year. If selected as a grantee, the organization will be evaluated based on these goals in the following grant cycle.

AUG

SEP

OCT

JUL



Board Meeting

In November, the board will convene for the grant cycle's final board meeting. Findings from the due diligence process will be provided to the board. Each organization will be discussed and evaluated, along with all grant renewals (organizations which received a grant in the prior year and have requested another grant). Both new considerations and grant renewals will be evaluated together. The board will vote on the most outstanding organizations, and determine grant amount for these organizations. The number of grants and grant amounts vary year-to-year.



Board Meeting Follow-Up

All organizations will be informed of their application/grant renewal status. Those organizations receiving a grant will be asked to sign a grant agreement, which includes the goals listed in the organization's application. The grant will be sent to the grantee soon after.

PHASE III

DEC

If selected for a grant, welcome to our family!

We will follow-up with you throughout the year to learn about the great work you are doing, and the impact you are making. Along with the occasional phone call or meeting, we will seek organizational updates and tracking toward your goals via an interim report prior to the July board meeting and an end-of-year report before the November board meeting.

Based on this, the board will determine if the grantee shall receive a grant renewal for the following year. All grants are only single year grants.

NOV