

# **The Baltimore Women’s Giving Circle**

## **Guide to the BWGC 2019-2020 Grant program**

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## **Baltimore Women's Giving Circle Grant Criteria**

Our mission: "Through collective giving and collaboration, The Baltimore Women's Giving Circle seeks to empower women and their families in the greater Baltimore area to achieve self-sufficiency."

Grants are awarded to nonprofit organizations whose projects and services promote self-sufficiency for women and their families. Promoting self-sufficiency is interpreted to mean supporting women of all ages and their families to live healthy, productive lives. Grants will focus on assisting those who are economically disadvantaged.

Projects addressing housing, addiction, financial literacy, education, health services, parenting, life skills, mentoring, workforce development, legal services, and violence prevention are examples of the types of projects funded. This list is not intended to be inclusive.

### **Geographic Focus:**

Projects must demonstrate that Giving Circle funds are primarily used in Baltimore City or Baltimore County.

### **Organizations Eligible for Funding:**

#### **The following are not eligible for funding:**

- Organizational endowments
- Capital improvements, fixtures, furniture and equipment, *except for items that directly benefit project participants*
- Purchase of event tickets or event sponsorships
- Deficit reduction
- Annual drives or annual giving campaigns
- Political activities or political action committees
- Projects requiring adherence to or acceptance of a particular religious belief, or projects requiring participation in a religious service or activity

Organizations must qualify as a not-for-profit organization, or have a fiscal agent that qualifies as a not-for-profit organization, under section 501(c)(3) of the Internal Revenue Code.

## **Grant Awards:**

Grants are awarded in amounts up to \$25,000. Awards are made for a grant cycle beginning on July 1 of the award year and ending on June 30 of the following year. All grant funds must be expended during this time period. This restricted grant may be used only for the purpose stated in the grant application. If a funded project is not implemented, grant funds must be returned to the BWGC. If a project is discontinued during the grant period, unexpended funds must be returned to the BWGC.

## **Applying for Grant Awards:**

An organization may submit only one grant proposal per grant cycle. *There are two exceptions to this policy:*

1. Large “umbrella” organizations, such as universities that have multiple independent, discrete entities, each of which is under separate executive leadership (such as a school or agency). Such independent, discrete entities may submit grant proposals for the same year.
2. Independent, discrete entities that have separate executive leadership and are linked only by sharing the same fiscal agent. Any such entity may submit a grant proposal for a particular year, regardless of whether another entity sharing the same fiscal agent also applies for a grant.

## **Reapplying for Grant Awards:**

An organization that receives a grant cannot be funded two years in a row. Organizations that receive funding may reapply after the following conditions have been met: (1) the funds granted have been spent as specified in the grant application; and (2) the organization has complied with all other conditions of the grant, including participating in site visits and/or interviews and submitting the final report.

Assuming the above conditions have been met, an organization receiving a grant beginning July 2020 would be eligible to receive another grant beginning July 2022. An organization that did not receive a grant in a funding cycle is eligible to reapply for a grant for that same project or any other project within the organization during the next grant cycle.

*There are two exceptions to this policy:*

1. Large “umbrella” organizations, such as universities that have multiple independent, discrete entities, each of which is under separate executive leadership (such as a school or agency). Such independent, discrete entities that have received funding for a project may not reapply until the conditions outlined above have been met. A different entity may apply for a grant regardless of the funding status of the other entities under the same umbrella organization.

2. Independent, discrete entities that have separate executive leadership and are linked only by sharing the same fiscal agent. An entity that has received funding for a project may not reapply until the conditions outlined above have been met. A different entity may apply for a grant regardless of the funding status of other entities using the same fiscal agent.

## Baltimore Women's Giving Circle Grant Process and Schedule

The Circle welcomes grant applications from organizations that meet our granting criteria. Before applying, please read our grant application criteria to make sure your organization and project meet all the requirements.

### Application Deadline: December 15, 2019 (midnight)

Emails announcing the RFP (Request for Proposals) are sent in September to nonprofit organizations. If you would like to be on this RFP mailing list, please send an email request to [grants@thebwgc.org](mailto:grants@thebwgc.org). However, being on the mailing list is not a prerequisite for submitting an application. Applications are accepted during a six-week period that begins on November 1, 2019. Grant applications must be submitted using BWGC's online grant application no later than December 15, 2019 at midnight.

Grantee selections are announced the following May.

Grant Information Sessions will be held Tuesday, November 5 from 1:30 – 3:30 and Wednesday, November 6 from 9:30 – 11:30 at The Baltimore Community Foundation, 2 East Read Street, Baltimore, MD 21202 in the 8<sup>th</sup> Floor Conference Room.

After your grant proposal is submitted, the BWGC grant selection process proceeds as follows:

- **January:** Grant applications are checked for compliance and completeness. Applicants whose proposals do not meet the BWGC criteria will be notified by email.
- **January:** Grant applications are assigned to teams of BWGC volunteer grant readers. Each team receives approximately six proposals to review and evaluate.
- **February:** Teams announce to the Grants Committee those proposals that have been selected for a site visit. Applicants not selected for a site visit will be eliminated from further consideration and will be notified by email.
- **February - March:** Teams conduct site visits to organizations that are being considered for funding. After the site visits, teams determine which projects to recommend for funding. Applicants eliminated after site visits will be notified by email. Site visits do not indicate funding will be awarded.
- **April/May:** Through a voting process, Baltimore Women's Giving Circle members select their final recommendations for grantee awards. All remaining applicants will be notified by email of the final status of their applications.
- **June:** Grant agreements are sent to successful grant applicants.

## **Baltimore Women's Giving Circle FAQs for Grant Applicants**

### **What is the size of a typical grant?**

Grants are awarded in amounts up to \$25,000. The range of recent grants has been \$3,000 to \$20,000 (2019-2020 is the first year the BWGC has offered \$25,00 grants).

### **What is the duration of a typical grant?**

Grant awards are for one year; grant funds must be used within the 12 months between July 1 of the award year and June 30 of the following year.

### **May use of the grant money be modified during that year?**

A grant may be used only for the purpose stated in the grant application.

### **May an organization apply the next year to continue the grant?**

An organization that receives a one-year award cannot be funded two years in a row. Organizations that receive funding for a project may reapply after the following conditions have been met: (1) the funds granted have been spent as specified in the grant application, and (2) the organization has complied with BWGC's post-grant evaluation process, which includes participating in site visits and/or interviews and submitting the final report.

Assuming the above conditions have been met, an organization receiving a grant beginning July 2020 would be eligible to receive another grant beginning July 2022. An organization that did not receive a grant in a funding cycle is eligible to reapply for a grant for that same project or any other project within the organization during the next grant cycle.

*There are two exceptions to this policy:*

1. Large "umbrella" organizations, such as universities that have multiple independent, discrete entities, each of which is under separate executive leadership (such as a school or agency). Such independent, discrete entities that have received funding for a project may not reapply until the conditions outlined above have been met. A different entity may apply for a grant regardless of the funding status of the other entities under the same umbrella organization.
2. Independent, discrete entities that have separate executive leadership and are linked only by sharing the same fiscal agent. An entity that has received funding for a project may not reapply until the conditions outlined above have been met. A different entity may apply for a grant regardless of the funding status of other entities using the same fiscal agent.

## **May an organization submit more than one grant proposal?**

No. An organization may submit only one grant proposal per grant cycle.

*There are two exceptions to this policy:*

- 1) Large “umbrella” organizations, such as universities that have multiple independent, discrete entities, each of which is under separate executive leadership (such as a school or agency). Such independent, discrete entities may submit grant proposals for the same year.
- 2) Independent, discrete entities that have separate executive leadership and are linked only by sharing the same fiscal agent. Any such entity may submit a grant proposal for a particular year, regardless of whether another entity sharing the same fiscal agent also applies for a grant.

## **What information should be contained in a proposal?**

Please pay close attention to the information requested on the grant application. It is important to describe:

- how your project will help women and their families achieve self-sufficiency, that is, meet the BWGC mission
- specific objectives and goals for the project
- who the participants will be
- what you hope to accomplish with your project
- how you plan to staff and manage your project
- how you will measure your project’s success and specific outcomes
- what experience your organization has that will support the project’s success
- what partner organization(s) will participate in the proposed project, if applicable

## **May men or boys be among those benefiting from a grant?**

The majority of the funds should benefit women and their children, regardless of gender. Men may not be the primary beneficiaries of a grant.

## **What common challenges have prior grantees experienced?**

- **Recruitment and Retention:** How will you recruit and retain participants?
- **Childcare:** If young mothers are involved, will childcare be provided while they are participating in a project?
- **Transportation:** Will transportation be a problem for participants, and if so, how will the problem be addressed?
- **Time Schedules:** Do project schedules accommodate participants’ schedules?
- **Mental Health and Substance Abuse:** How do you deal with client mental health and substance abuse problems?

- **Start-Up:** Will the project be ready to use the funds when they are awarded July 1 (e.g., project staff and space are secured)?

**Does the BWGC offer any multi-year grants?**

No

**What is the BWGC grant proposal review cycle and when will our organization know the outcome of its grant application?**

- **January:** Grant applications are checked for compliance and completeness. Applicants whose proposals do not meet the BWGC criteria will be notified by email.
- **January:** Grant applications are assigned to teams of BWGC volunteer grant readers. Each team receives approximately six proposals to review and evaluate.
- **February:** Teams announce to the Grants Committee those proposals that have been selected for a site visit. Applicants not selected for a site visit will be eliminated from further consideration and will be notified by email.
- **February - March:** Teams conduct site visits to organizations that are being considered for funding. After the site visits, teams determine which projects to recommend for funding. Applicants eliminated after site visits will be notified by email. Site visits do not indicate funding will be awarded.
- **April - May:** Through a voting process, Baltimore Women’s Giving Circle members select their final recommendations for grantee awards. Notification emails are sent to all remaining applicants as to the success of their applications.
- **June:** Grant agreements are sent to successful grant applicants.

**If my organization receives a grant, what are the reporting requirements?**

Each grantee will be assigned a team of members of the BWGC’s Post-Grant Evaluation Committee to be its liaison(s) during the grant period.

Further details may be found in the Post Grant Monitoring section of the Guide to the BWGC Grant Process.

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## Baltimore Women's Giving Circle Grant Application Questions

Here is a summary of the information that will be collected by the online grant application:

### Cover Sheet

- Project Name
- Names, titles, email addresses, and phone numbers of 2 people at your agency who can answer questions about this application
- Organization Website
- Amount Requested
- Total Project Budget
- Size of Organization (multiple choice)
- Type of Project (multiple choice)
- Category of Project (multiple choice)
- Population Served (multiple choice)
- Geographic Area Served (multiple choice)
- Ages Served (multiple choice)

### Mission Statement

- Organization Mission Statement
- Brief History of the Organization

### Project Narrative

Project Overview – *In one or two sentences describe the specific purpose of the project and how funds will be spent.*

Project Details – *What do you hope to achieve? Why is the project needed? Who will participate in your project? What specific activities will you do to achieve your goals? How will your project assist women and their families work toward or maintain self-sufficiency?*

Organizational Capacity – *Who will staff your project? What are the qualifications of your staff? What experience does your organization have that will support the project's success? How does the project help your organization meet its mission?*

Project Evaluation – *What are your specific measurable outcomes for this project? What criteria will you use to measure your success?*

Project Sustainability – *What are your plans for continuing this project after your grant cycle ends?*

- Partnerships – *Do you plan to partner with another organization(s)? If yes, please describe the partnership arrangement(s).*

- Institutional Review Board Approval – *Does your project require Institutional Review Board (IRB) approval? If so, what is the timetable for obtaining IRB approval?*

**Required Attachments** (Notes: \*If you do not have the specific document requested, please attach a Word or PDF document that explains when you will be able to provide the requested information or how the document you are sending is a relevant substitute. If sending an explanation plus a substitute document, please combine into one PDF before uploading.

\*\*If your file is too large to be uploaded, please convert it to a PDF and try again. Still too large? Compress the PDF to a ZIP file. If that fails too, please contact [grants@thebwgc.org](mailto:grants@thebwgc.org).)

- Project Budget (PDF file; 2 MB limit)
- *If applying for a specific project, include a project budget (income and expenses) including all committed and anticipated funding for the project. The project budget should be aligned with the project details in the application.*
- *If applying for general operating funds, include an operating budget.*
  - *Indicate how the BWGC funding will be used.*
  - Organization’s financial statement for the most recently completed fiscal year compared to budget (PDF file; 3 MB limit)
  - Organization’s current year-to-date financial statement compared to current year budget (PDF file; 3 MB limit)
  - Audited Financial Statement – *Most recent compilation, review or audited financial statement, or a copy of the organization’s most recent IRS Form 990, if audited financials are not required.* (PDF file; 10 MB limit)
  - Board of Directors/Trustees – *Name, occupation, years with organization and percent of board members donating to the organization.* PDF file; 1 MB limit)
  - IRS Documentation of 501(c)(3) status or that of your fiscal agent (PDF file; 1 MB limit)

## Optional Attachments

- Letter(s) of Partnership Agreement – *Please attach letter(s) of agreement from partner organization(s) to participate in proposed project, if applicable.* (Single PDF File; 1MB limit)
- Annual Report (PDF file, 8 MB limit)
- Supplemental Information – *Attach any additional information, such as client testimonials or letters of recommendation* (Single PDF file; 2 MB limit)

## Baltimore Women’s Giving Circle Required Financial Documents

In this section, the required financial documents are displayed in the shaded boxes, followed by brief descriptions of the documents and the rationale for requesting them.

### Document 1: Project or Operating Budget:

- If applying for a specific project, include a project budget. The project budget should be aligned with the project details in the applications.
- If applying for general operating funds, include an operating budget for the organization.

The project or organization budget should include income (all committed and anticipated funding) and expenses, itemized by category, e.g., salaries with F.T.E. In your budget narrative, be sure to indicate how the BWGC funds will be used.

The BWGC will provide a budget template for you to use should you need one. If you have your own budget form, please check the template to be sure you have included all the categories listed there.

When looking at a project or organization budget, grant reviewers might consider the following:

- Has the organization made efforts to secure funding from other sources?
- Is the project budget realistic considering the size of the organization?
- Is the budget itemized with reasonable and justifiable costs per item?
- Are the costs reasonable in relation to the outcomes and number of participants?

### Document 2: Organization’s financial statement for the most recently completed fiscal year compared to budget.

Document 2 is produced in several versions by nonprofits, calling it various names such as budget report, profit and loss, income and expenses, etc. No matter what it’s called, this statement of financial activities shows the organization’s actual income and expenses for the most recently completed fiscal year compared to the budgeted income and expenses.

### Document 3: Organization’s current year-to-date financial statement compared to current year budget.

Document 3 is an interim financial statement reporting from the beginning of the current fiscal year to the date of the application submission. This year-to-date financial statement reflects the most current financial accounting, covering a period of less than one year, providing reviewers with up-to-date financial information on the nonprofit’s financial operations.

## **Document 4: Audited Financial Statement.**

Document 4, the audited financial statement refers to the work product resulting from the independent examination of a nonprofit's financial records by a licensed certified public accountant to determine whether the organization adheres to "generally accepted accounting principles."

If audits are not required, the organization can submit a review or compilation. A financial "review" conducted by an independent auditor examines the nonprofit's financial statements and determines whether the financial statements are consistent with generally accepted accounting principles. A compilation differs significantly from a review or an independent audit. It is literally a compilation of financial records into a format required by accounting standards. If none of these are available, the nonprofit may submit its most recent IRS Form 990.

When looking at these various financial statements (Documents 2-4), grant reviewers will consider the following:

- Is the organization financially sound?
- Are financial controls in place to support sustainability?

**Document 3: Organization's current year-to-date financial statement compared to current year budget.**

### **Document 4: Audited Financial Statement**

Most recent compilation, review, or audited financial statement, or a copy of the organization's most recent IRS Form 990, if audited financials are not available.

## **Baltimore Women's Giving Circle Post-Grant Evaluation and Monitoring**

The BWGC believes that it is important to maintain a relationship with grantees during their grant period and has established a post-grant evaluation and monitoring process for that purpose. Although the Circle expects that each grantee will successfully meet the objectives set forth in the its application, we also want to stay in touch to discuss your project or organization's progress, to be aware of any challenges that you may encounter, and to learn about factors that lead to your success.

Each grantee will be assigned a team composed of members of the Circle's Post-Grant Evaluation Committee that will serve as the Grantee's liaison(s) during the grant period. The liaison team will schedule at least one onsite progress review at a mutually convenient time midway through the grant period. Grantees are encouraged to have at least their Executive Director and Project Director present during the liaison team's visit. The team will also follow up with each grantee periodically until the end of the grant.

In accordance with the BWGC grant agreement, all grantees are expected to complete a final report within 30 days after the grant expires. These reports are the source of important information for Circle members about the impact that their funds are making in the Baltimore region.

The grant monitoring schedule is as follows:

- **July:** Grantees begin expending BWGC funds
- **November - December:** Liaison teams conduct onsite progress review meeting
- **March - June:** Liaison teams make periodic contact with assigned grantees
- **July (after grant ends):** Final grantee reports are due by July 31<sup>st</sup>.

# **Baltimore Women's Giving Circle Post-Grant Reporting**

## **Information requested for Final Grant Report**

Here is a summary of the information the Grantee must provide in the final grantee report:

### **Project Description**

- A concise description of the project as implemented.

### **Project Detail**

- Who participated in the project (number, ages, and geographic (i.e., zip codes served)?
- Discuss the ways in which your project empowered women and their families in the greater Baltimore area to work toward self-sufficiency.
- Was the project implemented as described in your grant application? If no, describe changes.
- Was the project successful when measured against the specific project outcomes that you identified in your application (Y/N)?
- What specifically did you accomplish? What factors contributed to the success?
- What challenges did you encounter? Describe how you remedied any problems that arose.

### **Organizational Information**

- Who oversaw and managed the project? If different from the person(s) identified in the grant application, explain the reason for the change.
- Did this project make a difference to your organization? If so, discuss how it enhanced your organization, helped further your mission, led to partnerships/collaborative efforts with other organizations and/or structural/programmatic changes to your organization.

### **Additional Information**

- Will the project continue next year?
  - If the project is continuing, what are the funding sources? ▪ If the project is not continuing, why?
- What would you modify if you were to repeat the project?
- Did the BWGC grant funds enable you to receive financial support from others? If yes, describe type of support.

### **Attachments**

- Actual project income and expenses, with separate breakout of you use of the BWGC funds, compared to original budget submitted with your grant application. Discuss any major changes in the budget.

- A favorite story or a special accomplishment about your project that you would like to highlight. Photos, press clippings or flyers are welcome. If you wish to attach more than one document, please combine them into a single PDF.

## **Grantee Connect**

The Grantee Connect Committee fosters relationships among BWGC grantee alumni and assists them in their non-profit work by presenting programs in which the past Grantees may have a special interest. Topics such as creative fundraising, board development, networking, and attracting and keeping volunteers have been the subject of meetings in the recent past. Grantee Connect organizes and hosts events, customarily two each year, for former grantees. A portion of the meeting provides opportunities for the Grantees who attend to meet and discuss issues and share experiences with other attendees. Partnerships have developed between grantees that further each organization's mission