

Empower Applicant Workshop

February 1, 2024

10:00 a.m. – 11:30 a.m.



Background

- Huey and Angelina Wilson Foundation is a private family foundation created in 1986 and began grantmaking in 2000.
- With 5 full-time staff, the Foundation has granted more than \$76 million in support to nonprofit programs and projects in the Capital area over the past 24 years.
- Focused on:
 - Basic Needs
 - Healthcare
 - Education
 - Prison Reentry



Background

- Summer 2019, Huey and Angelina Wilson Foundation embarked on a journey to create a new strategic plan.
- Shifted the grantmaking process from a more traditional, responsive framework to one focused on proactive investments.
- Centric to this shift is a strategy focused on place-based investments using the proven **Purpose Built Communities (PBC)** model:
 - Housing
 - Education
 - Community Wellness
 - Economic Vitality

Workshop Objectives

At the end of today's training, participants will:

- Be able to identify how their work contributes to the goals of the Empower pillar.
- Understand the components of a successful application.
- Understand next steps and overall application timeline.

Our Goals

Through the Empower pillar, Huey and Angelina Wilson Foundation will serve as a catalyst for **place-based collaboration** focused on improving outcomes for children and families.

The goal is to support grantees that help residents and communities get the support they need to achieve **long-term, sustainable change**.

Our Approach

Place-based philanthropy describes an approach that targets a specific location—be it a **block, neighborhood, or community**—upon which to focus resources and make a transformative impact.

Huey and Angelina Wilson will work alongside residents to focus its grantmaking efforts on a six ZIP codes in North Baton Rouge.

Our Approach

Four types of investments:

- 1. Direct Service** (Program Support)
 - *New or existing programs that make positive gains for participants.*
- 2. Partnerships & Collaborations**
 - *Formal partnerships, coalition building efforts and/or continuums that strengthen collaboration.*
- 3. Systems Change**
 - *Awareness, research and advocacy efforts addressing community issues of concern that result in changes to policy or practice.*
- 4. Capital**
 - *Building purchase, construction, expansion, renovation, and/or land acquisition.*



Grant Guidelines

Prospective Partners

Successful applicants for this pillar will:

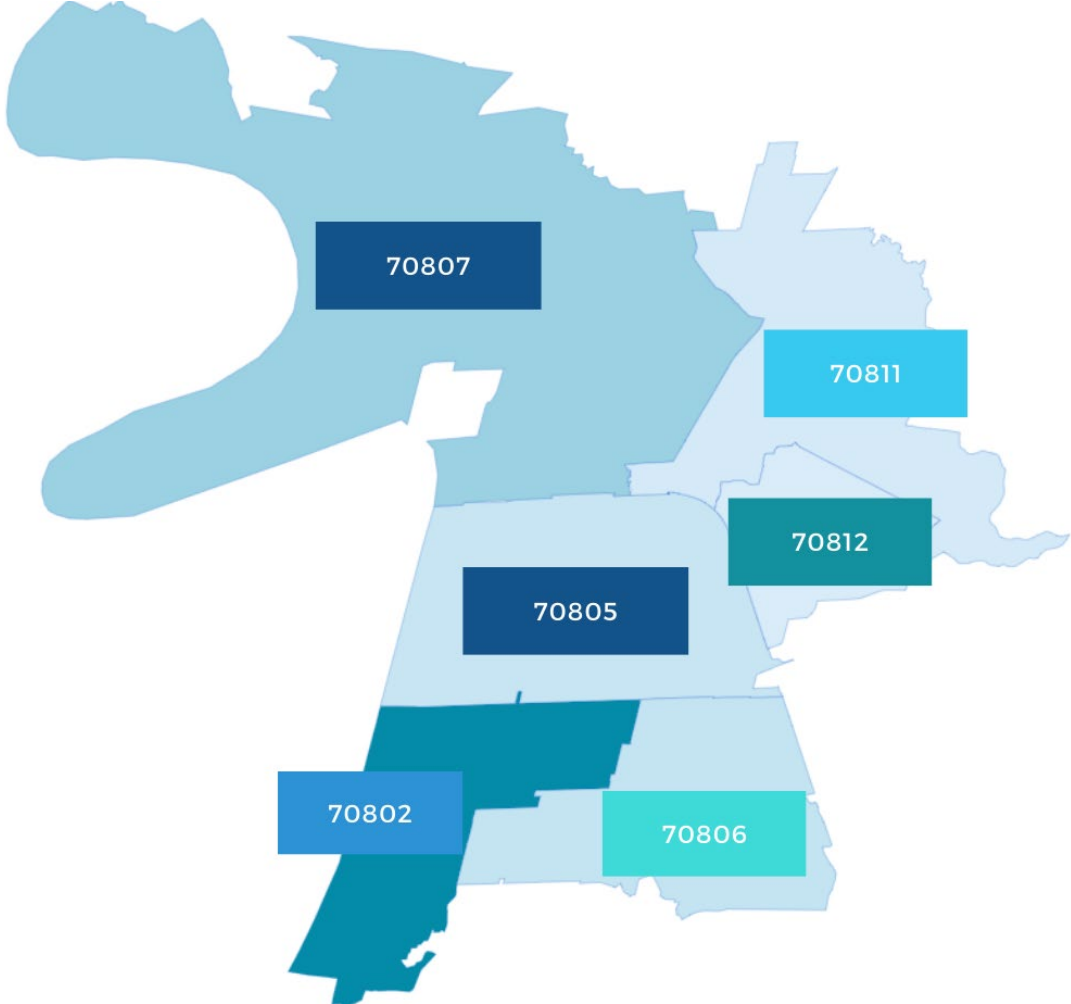
- Be physically located in and/or **have programming that intentionally and directly benefits individuals and families in the areas of impact.**
- **Value community engagement.** Organizations must demonstrate they are prioritizing resident voice and doing projects “*with*” rather than “*to*” the community.
- **Demonstrate effectiveness.** Be a registered 501(c)3 nonprofit organization that has the capacity to carry out the proposed work and have the appropriate evaluation measures in place.
- Address one or more of the Empower focus areas of **housing, education, community wellness, and economic vitality.**

Geography

This application cycle supports projects being implemented directly in the **neighborhoods and schools** located within six zip codes:

- 70802
- 70805
- 70806
- 70807
- 70811
- 70812

Geography



Geography

- Please note that we will only consider proposals **intentionally** and **directly** benefiting children and families in these areas through permanent and/or mobile supportive services
- *Proposals that indirectly serve individuals in these zip codes as part of your overall clientele will not be considered.*

Housing

Safe, secure and affordable housing leads to better education, employment and health outcomes and increases generational wealth building opportunities for families.

Examples of programming the Foundation will support include:

- Homeowner education
- Down payment assistance
- Housing development and critical repairs
- Risk reduction/home hazard mitigation
- Energy efficiency
- Landlord engagement and education
- Heir property initiatives

Education

Access to quality education from birth to college, career, and beyond reduces economic inequalities and powers prosperous communities.

Examples of programming the Foundation will support include:

- Quality out of school time (OST) opportunities
- Literacy supports/Tutoring
- Youth mentoring
- Teacher trainings and certifications
- Internships/apprenticeships
- College preparation

Community Wellness

Families cannot thrive if they lack access to essential services, recreation, or are persistently exposed to unsafe living conditions.

Examples of programming the Foundation will support include:

- Food insecurity
- Parental resources/advocacy
- Public safety
- Access to physical and mental health services
- Family counseling and case management
- Drug rehabilitation
- Blight reduction
- Healthy lifestyle programming

Economic Vitality

A vital economy is one that includes strategies to increase workforce pathways, build assets, and stimulate opportunities for economic growth.

Examples of programming the Foundation will support include:

- Entrepreneurship
- Adult literacy and education
- Job training and placement
- Small business development
- Attracting neighborhood-serving restaurant and retail
- Financial education and planning



Operating Principles

Considerations

The Foundation reviews each proposal with respect to available funds and responses to three overarching questions:

1. What will be the results from this project and how will we know when those results have been achieved?
2. How likely is it that this applicant can achieve the results they are proposing?
3. Is this the best possible use of Foundation funds given other opportunities before us?

Investments

1. Initial Empower investments will be made in one-year increments.
2. Average Wilson Foundation grant amount is approx. \$40,000.
3. Partners will be expected to submit interim and final reports.
4. Opportunities for additional support will be provided to partners who make (and communicate) meaningful progress toward Empower goals.

Next Steps

Online Application

Timeline

Assistance

Applications

Two Step Application Process:

1. Prospective program partners are invited to submit a short Letter of Intent (LOI) with a submittal deadline of **5:00 p.m. February 8, 2024.**
2. Organizations that successfully submit an LOI and are selected to submit a full grant application will be notified via email by **February 15, 2024.**

Letter of Intent

1. Organizational Information

- Key Contacts
- Mission and History

2. Project Information

- Project Title
- Total Amount Requested
- Empower Focus Area (*Housing, Education, Wellness, Economic Vitality*)
- Type of Support (*Capital, Direct Service, Partnerships, Systems Change*)
- Brief Description of Project
- Project Start/End Date
- History of working with the community

Full Grant Application

1. Organizational Background

- Mission and History
- Organizational Budget

2. Overview and Financing

- Elevator Pitch
- Project Budget
- Funding to Date/Sustainability

3. Project Details

- Project Title
- Brief Description of Project
- Evaluation Methods
- Partners and Collaborators

Required Attachments

1. Responsible Project Director(s)

- Who is responsible for carrying out the program?
- Short biography appropriate/no resumes needed

2. Budget Information

- Project Budget
- Budget Narrative

3. Board List

- Name, occupation, role, term

4. Financial Statements

- Operating budget, balance sheet, most recent audit (if available)

Required Attachments

5. IRS Determination Letter

- Letter stating that the organization or its fiscal agent is tax-exempt under section 501(c)3 of the Internal Revenue Code

6. Board Authorization Letter

- Statement from organization's BOD authorizing the grant request and agreeing to implement the program if funded
- Can also be the portion of the minutes that reflect approval, or a formal resolution.

7. IRS Form 990

- Copy of the organization's most recently submitted 990 or Form 990-N, Electronic Notice (e-Postcard) for organizations not required to file Form 990 or 990-EZ

Application Timeline

February 1 st	Applicant Workshop/ LOI Available Online
February 5 th -7 th	30 min Q&A Sessions (Limited Slots)
February 8th	LOIs due by 5:00 p.m.
February 15 th	Invitations for Full Applications Sent
February 29 th	Full Application Deadline
March 25 th - April 12 th	Site Visits
May 3 rd	Applicants Notified

Helpful Hints



- **Healthy Board:**
 - More than 5 members, limited familial relationships, represents a cross-section of professional expertise
 - Meets regularly, takes minutes, familiar with bylaws
- **Sustainable Fundraising Model:**
 - It is recommended that no more than 20% of your overall income come from any one source/funder
- **Transparent Finances:**
 - File required IRS documents in a timely manner (preferably by a third-party tax preparer)
 - Share regular financial statements with Board
 - Have a clear to understand financial management system (Quickbooks, etc.)

Contact Information

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