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Request for Proposals (RFP) Community Impact Grants - Fiscal Year 2019

Our mission is to strengthen our communities, enrich lives, and inspire caring.

About Finance of America Cares

Finance of America Cares (FOA Cares) is the independent, charitable, and philanthropic arm of Finance of America. Our platform connects people, charitable resources, and ideas, to unite behind common goals and spark positive change throughout the nation. Visit FOAcars.com to learn more.

Overview and Purpose

FOA Cares is pleased to invite applications from mission-driven nonprofit community-based organizations for funding consideration, whose mission and focus areas align with our own. Our grantmaking areas of focus include, Human Services, Youth, and Veterans.

FOA Cares utilizes a multi-step approach to grant application and review that first requires submission of an application. The appropriate Regional Impact Committee (RIC), which is comprised of volunteers employed with Finance of America, then assesses each application from their respective region. This volunteer-based RIC selects programs for funding based on strategies and best practices that can have the greatest impact on critical community issues, with sound metrics for measuring success. Please see the "Annual Grant Cycle" (Attachment 5) for additional details on the grantmaking process.

It is expected that the maximum grant per recipient will be \$5,000, depending on the availability of funds and the number of applicants approved to receive grants. At its sole discretion and on a case-by-case basis, FOA Cares may approve grants larger than the expected \$5,000 maximum.

Grantmaking Focus Areas

We engage Finance of America employees in all of our strategic initiatives with local nonprofits, including grantmaking, called Community Impact Grants. Together, we are creating action-oriented solutions that help to enhance the overall quality of life in the communities where we live and work.

Our focus areas for grantmaking to nonprofits include the following three focus areas:

- **Veterans**
 - To recognize the sacrifices that they and their loved ones have made on behalf of our country, we proudly support active military personnel, veterans, and their families on a local level. We provide resources to nonprofit veteran's service organizations whose programs connect veterans and their families facing hardships to an array of critical human services in the following categories;

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- Direct Human Service programs that address basic needs, including assistance with clothing, hunger relief, and combatting homelessness.
- Education and Career transition initiatives that prioritize readjustment to civilian life after military service, while maintaining stability for their families.
- Financial stability and education services, including support regarding all aspects of housing and home ownership assistance.
- Our goal is to serve the emerging and long-term needs of our nation's veterans and their families.

- **Youth Development**
 - The future drivers of change for the development and stability of our country are today's youth. We support life-enhancing programs that engage youth within their communities, schools, social groups, and families, that are positive and constructive to the development of their character and enable all young people to reach their full potential. Our focus is centered on nonprofit programs and services that connect youth to the following services and/or programs;
 - Character and Leadership development services and programs that acknowledge all youth as having the capacity for positive growth and further develops and/or strengthens youth assets.
 - Risk Prevention initiatives to avert risky behaviors and attitudes in youth, and efforts that work to address negative behaviors.
 - Civic Engagement/Involvement organizations that provide opportunities for youth to contribute to their schools and broader communities through volunteer service.
 - Our goal is to empower our youth to become compassionate and responsible members of society.

- **Human Services**
 - Human services attempt to meet basic human needs by focusing on prevention as well as remediation of problems. We are committed to improving the overall quality of life for individuals and families at their point of most urgent need. To achieve this, we're engaged in numerous initiatives with nonprofits whose programs and services prevent or end homelessness in the following categories;
 - Emergency shelter, rapid-rehousing, and permanent supportive housing.
 - Local food banks, soup kitchens, and school-based child feeding and nutrition programs that provide hunger relief.
 - Thrift stores providing household furnishings and clothing.
 - Our goal is to enhance access to basic needs for underserved individuals and families.

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Fundamentals | Checklist

Required Documents

Prior to proceeding to the grant application, please carefully review the list of required documents to complete your application in the order indicated below:

- Grant Application Cover Sheet (see Attachment 1).
- Narrative of the organization's purpose, program purpose, objectives, etc. (Attachment 2).
- Grant Application Project Budget (Attachment 3).
- Verification of Good Standing Document (Attachment 4).

Additional required attachments include:

- IRS Determination Letter, indicating EIN, 501(c)(3) status and public charities status.
- Most recent IRS Form 990 or 990EZ, and any relevant communication from the IRS.
- General Liability insurance coverage certificate(s).
- Organizational brochure, pamphlets or other descriptive material (if available).

Note: *If the applicant organization cannot provide one of the required documents, please provide the reason why on a separate document.*

Selection Criteria

Program Narrative

Each proposal will be assessed by the appropriate Regional Impact Committee and scored according to the following criteria:

- I.** Organizational Summary
- II.** Organizational Capacity
- III.** Impact
- IV.** Collaboration
- V.** Feasibility
- VI.** Program Budget Justification

The application requires a thorough description of the above-listed criteria and is the substance of your application. For more information, please peruse Attachment 2 (*Program Narrative*). Applicants may submit a separate additional document for this required section of the application.



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Funding Guidelines

Eligibility

Organizations must meet the minimum criteria to apply, which includes, but is not limited to the following:

- While the total project cost may include other funding sources, the proposed request from FOA Cares must be within the expected \$5,000 grant funding limit.
- Have a current fiscal year budget and maintain an annual operating budget.
- Have an active, local Board of Directors comprised of nonpaid volunteers who meet at least quarterly.
- Ability to complete Finance of America Cares' mid-year and final progress reports.
- Demonstrated expertise with the initiative/program covered in the competitive grant application.
- Stated policies of nondiscrimination and complies with all the requirements of state and federal laws and regulations on nondiscrimination and equal opportunity, including the Americans with Disabilities Act (ADA), with respect to clients, officers, employees, and volunteers.
- Agree to comply with FOA Cares partnership, marketing and fundraising requirements (annual campaign, displaying the Finance of America Cares logo on website/materials).
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Ineligibility

Please note, FOA Cares will **not** provide support for:

- Organizations that discriminate by race, color, creed, gender, sexual orientation or national origin.
- Religious organizations, except for non-sectarian activities.
- Fraternal, political, advocacy or labor organizations.
- Political campaigns and/or lobbying.
- Individuals or private foundations.
- Annual funds of hospitals or colleges and universities.
- Tickets and goodwill advertising.
- General operating costs, i.e. salaries, rent, insurance.
- Endowments.
- Multi-year commitments.
- Organizations whose key employee(s), director(s), officer(s), and/or agent(s) convicted of fraud or a crime, and/or are being investigated due to any other any other financial or administrative impropriety.
- Event, conference or seminar sponsorship or entry fees.
- Organizations whose mission and/or focus areas do not align with FOA Cares.

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Important Dates Grant Cycle Planning

It is imperative that grant applicants abide by specific timelines provided by FOA Cares in the 2019 – 2020 Grant Cycle Planning below. To address general needs, an optional Technical Training will be available during select days in July and August for interested applicants to attend.

Applications must be submitted directly to the FOA Cares Program Director at cares@financeofamerica.com, on or before **Friday, August 30, 2019 by 5 p.m. EST/2p.m. PST.** Organizations should aim to submit their application at least one day in advance of this deadline. Late submissions will not be accepted. No changes or additions will be accepted after the deadline date and time.

Please utilize the following 2019 – 2020 Grant Cycle Planning to better prepare for upcoming deadlines that may apply:

2019-2020 Grant Cycle	
Task	Date
Application Opens	July 1, 2019
Technical Training & Question/Answer Webinars (Optional to Applicants)	July 18 and August 15, 2019
Application Deadline	August 30, 2019; on or before 5pm EST
RIC Reviews Screens/Reviews Applications	September 2019
Grant Application Status to Applicants	October 2019
Award Period	November 1, 2019 – October 31, 2020
Site Visits (Optional)	January – May 2020
Mid-Year Progress Report (Awarded Grantees Only) Deadline	April 30, 2020
Final Progress Report (Awarded Grantees Only)	November 30, 2019



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Additional Important Information

Grants Disclaimer

Community Impact Grants are competitive. FOA Cares takes many actions to ensure that the grant review process is thorough, unbiased, and produces funding recommendations that represent the priorities set forth by FOA Cares and its subsidiaries. Funding is never guaranteed to those organizations that apply. Furthermore, funding for subsequent years is never guaranteed to those organizations who are awarded a grant, and/or have been awarded a grant in any past grant cycle(s).

Award Information

Awarded grantees will enter into a contract with FOA Cares that specifies the award amount, deliverables, reporting requirements, and partnership responsibilities. Reporting requirements will include semi-annual, and final program reporting on outputs, progress made toward meeting objectives outlined in the grant application, number of people served, and outcomes regarding community impact.

Grantee activities may include active participation with FOA Cares initiatives. FOA Cares may request that grantees display the FOA Cares logo on correspondence and publications, including websites, as they relate to the funded program.

Contact Information

For questions or inquiries regarding FOA Cares' Community Impact Grants, please reach out to the FOA Cares Program Director, Ashley Pruitt at cares@financeofamerica.com, or by phone at 772-812-4798. E-mails to our team typically receive a timelier response.

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Community Impact Grant Application

Attachment 1: Grant Application Cover Sheet

Legal Name of Organization:	Click or tap here to enter text.
Tax ID Number:	Click or tap here to enter text.

Geographic Area Project Serves:	
Project Start Date: MM/DD/YY	Project End Date: MM/DD/YY
Requested Amount:	\$Click or tap here to enter text.

Project Name:	Click or tap here to enter text.
Complete Project Description:	Click or tap here to enter text.

Address 1:	Click or tap here to enter text.
Address 2:	Click or tap here to enter text.
City, State, Zip Code:	Click or tap here to enter text.

President/Executive Director:	Click or tap here to enter text.
Primary Contact Name:	Click or tap here to enter text.
Contact Job Title:	Click or tap here to enter text.
Contact Email Address:	Click or tap here to enter text.
Contact Phone Number & Extension:	Click or tap here to enter text.
Organization Website:	Click or tap here to enter text.
Year Founded:	Click or tap here to enter text.
Invited by a Finance of America Employee to Apply (Yes/No)? <i>If yes, please provide their full name.</i>	Click or tap here to enter text.

I certify to the best of my knowledge that the tax-exempt status of this organization remains in effect:

President/Executive Director Signature

Date

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Attachment 2: Program Narrative

The following outline may be used as a guide to complete the narrative. Please address the criteria below for each section, as this is the substance of your application.

VII. Organizational Summary (*limit – one page*)

- a. Mission and Vision
- b. History, including major accomplishments
- c. Overview of all current programs and/or activities

VIII. Organizational Capacity (*limit – one page*)

- a. Describe the general organizational structure; including, expertise, staff, space, and equipment.
- b. Describe the applicant organization's experience in providing services within the programs of the general sort being proposed.

IX. Impact (*limit – one page*)

- a. Provide a thorough description for the following regarding the proposed program:
 - i. Program services that will be provided.
 - ii. Target population and approximate number of unduplicated clients served annually through the proposed program.
 1. Explain how the organization is valued by the target population, and any gaps it may cover in the service area.
 - iii. Methods to measure the impact on the target population the proposed program serves, and any specific activities/outputs that will be provided as a part of program services.

X. Collaboration (*limit – one page*)

- a. For the proposed program, provide a thorough description of the following:
 - i. Ways in which the program aligns with FOA Cares funding priorities.
 - ii. Potential collaboration initiatives with FOA Cares and/or complementary goals.
 - iii. Existing and/or proposed relationships and/or collaborations with other community groups during and past the project period.

XI. Feasibility (*limit – one page*)

- a. For the proposed program, provide a thorough description of the following:
 - i. Likelihood the objectives and activities will be achieved.
 - ii. Community outreach strategies for targeted participant identification, engagement, and retention.



Attachment 3: Grant Application Program Budget

It is expected the maximum grant per recipient will be \$5,000, depending on the availability of funds and the number of applicants approved to receive grants. At its sole discretion and on a case-by-case basis, Finance of America Cares may approve grants larger than the expected \$5,000 maximum. This budget is intended solely for the proposed program – not the organization’s budget as a whole.

REVENUE	Committed Funds	Requested or Pending Funds
1. Grants and Contributions		
<i>Please itemize all foundation and corporate gifts, individual donations should be combined.</i>	\$ -	\$ -
	\$ -	\$ -
	\$ -	\$ -
	\$ -	\$ -
	\$ -	\$ -
	\$ -	\$ -
	\$ -	\$ -
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	\$ -	\$ -
	\$ -	\$ -
2. Earned Income		
<i>Please itemize any additional forms of income.</i>	\$ -	\$ -
	\$ -	\$ -
	\$ -	\$ -
3. Other		
<i>Please itemize any additional forms of revenue.</i>	\$ -	\$ -
	\$ -	\$ -
	\$ -	\$ -
	\$ -	\$ -
TOTAL	\$ -	\$ -
TOTAL REVENUE (Committed + Requested Funding)	\$ -	\$ -



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EXPENSE	Amount Requested in Proposal	Total Program Expenses
<i>Please itemize all program related expenses.</i>	\$ -	\$ -
<i>Administrative Expenses/Overhead</i>	\$ -	\$ -
	\$ -	\$ -
	\$ -	\$ -
	\$ -	\$ -
	\$ -	\$ -
	\$ -	\$ -
	\$ -	\$ -
TOTAL EXPENSE	\$ -	\$ -

Description of Program Budget (limit - one page)

- I. For the proposed program, provide a thorough description of the following:
 - a. Explanation of program budget as shown in Attachment 3.
 - b. The intended use of proposed program funds if awarded a grant from FOA Cares, including cost per client if available.
 - c. How the overall budget justification is appropriate and realistic.



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Attachment 4: *Verification of Good Legal Standing*

Each of the entities applying for funding should complete a copy of this form.

If you answer "Yes" to any of the following questions, please provide details, including the applicable regulatory body or governmental agency, the court or agency in which the proceeding is, or was, pending. The date it was instituted, the principal parties, a description of the factual basis alleged to underlie the proceeding, the relief sought, and any mitigating circumstances. Please describe any event that has occurred within the last ten (10) years.

1. Has the entity or any Key Person been subject to any criminal legal proceedings involving a felony offense? (*"Key Person" means any current director, officer, manager, or key employee of the entity, or any persons with similar duties or responsibilities*).

No Yes if yes, please explain: [Click or tap here to enter text.](#)

No Yes if yes, please explain: [Click or tap here to enter text.](#)

2. Has the entity been subject to any regulatory or governmental investigations, audits, or inquiries, whether resolved, pending, or threatened?

No Yes if yes, please explain: [Click or tap here to enter text.](#)

3. Has the entity or any Key Person been party to any resolved, pending, or threatened legal proceeding in which the entity or Key Person was either a party adverse to FOA Cares, or in which the entity had a material interest adverse to FOA Cares?

No Yes if yes, please explain: [Click or tap here to enter text.](#)

Entity Name: [Click or tap here to enter text.](#) **Date:** [Click or tap here to enter text.](#)

Authorized Signature

Signatory's Printed Name

Date

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Attachment 5: *Grant Program Cycle*

NOTE: The grant process will take approximately 8-12 weeks from submission of an application to notification of each Regional Advisory Committee decision.

