

The Lincoln and Therese Filene Foundation, Inc.
World Trade Center West, 155 Seaport Boulevard, Boston, MA 02210-2604

Grant Application Guidelines

The Lincoln and Therese Filene Foundation is a private family foundation that makes grants to tax-exempt organizations and institutions that provide direct services to individuals and localities.

In keeping with its founders' interests, the Foundation's major goals are:

- ❖ *to enable those who are disadvantaged to help themselves and others,*
- ❖ *to reduce social conflicts and create harmonious communities,*
- ❖ *to encourage informed civic participation on local, state and regional levels, and*
- ❖ *to promote participation in the performing arts.*

The Foundation awards grants in the following general areas:

- ❖ *Civic Education*
- ❖ *Human Development and Self-Sufficiency*
- ❖ *Music Education and Performing Arts*
- ❖ *Public Education and Broadcasting*

The Foundation awards grants to educational institutions, public television, and other non-profit organizations whose proposals are specific and achievable, and whose successes can be replicated by other organizations. Awards are granted generally in the \$5,000 - \$10,000 range.

Only not-for-profit organizations with Section 501(c)(3) tax exempt status are eligible for grants.

Grants are made primarily to organizations and institutions in New England. The Foundation does not support individuals, organizations without Section 501(c)(3) status, lobbying, religious or political groups. The Foundation does not make grants in support of capital campaigns or general operating costs.

The Board of Directors of the Lincoln and Therese Filene Foundation meets twice each year, usually in **May and in November**, to review grant applications, evaluate results of previous grants, and allocate funds. Applications are reviewed by a program committee which in turn makes recommendations to the Board.

Application deadlines are **March 1 and September 1**. Project reports are due annually on **March 1 or September 1**.

To apply for a grant, please send a cover letter and your completed Grant Request Cover Sheet and Request for Funding forms to:

Alane Harrington Wallis, Charitable Foundations Manager
The Lincoln and Therese Filene Foundation, Inc.
World Trade Center West, 155 Seaport Boulevard
Boston, MA 02210-2604

You may send requests electronically to awallis@nutter.com

Telephone: (617) 439-2498

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Grant Request Cover Sheet
Please submit with completed proposal

Date of Application

Legal Name of Organization

Address and Website

Phone Number (with area code)

Organizational Information

IRS 501(c)(3) nonprofit yes no If yes, FIN #

If no, identify your fiscal agent and attach the written agreement from fiscal agent.

Year Organization was Established

President/Executive Director

E-mail address

Phone Number

Contact person and title (if different from Executive Director):

E-mail address

Phone Number

Organization's total annual budget: \$ _____ Fiscal Year End ____/____/____

Total Number of Board Members

Total Number of Staff

Organizational Mission Statement (50 words or less)

Brief Description of Organization (75 words or less)

Population Served (include age groups, race & ethnicity, income levels, etc.)

Description of Proposal

Project/Program Name

Amount Requested \$

Total Project Budget \$

The period this grant will cover: ____/____/____ to ____/____/____

Summarize the proposal and its strategic link with the Filene Foundation

List the proposal's target population, constituents and geographic area served

Is your organization a United Way affiliate?: yes no

List any support from the Filene Foundation in the last five years

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Request For Funding

Profile of your organization

Organization's History

Organizational Goals and Objectives (short-term and/or long term)

Programs and Services

Organizational Structure and Size (board, staff, volunteer involvement)

Profile of your request

Description of Program/Project, including goals, objectives and desired outcome.

Community or regional needs and/or challenges that this effort will address.

Community or regional opportunities and strengths this effort will draw upon.

Specific activities and timetable for meeting your stated objectives.

What do you hope to accomplish with this program/project?

Explain how the funds will be used.

Staff/volunteers and their qualifications.

Identify those organizations, if any, with which you collaborate.

Future plan to sustain this effort and strategy for building your funding base.

Evaluation

Define your criteria for success for the organization or project

Outline your evaluation process, such as participation by your constituency(ies)

Attachments (may be mailed under separate cover)

IRS letter confirming tax-exempt status (501(c)(3) and 509(a))

Background of key personnel

Current Board list with relevant backgrounds, affiliations, and towns of residence

Financial information:

- ❖ Total board approved organizational budget for the fiscal year(s)
- ❖ If seeking project or capital support, include project or capital budget for fiscal year(s)
- ❖ Most recent independent audit (if required by law)
- ❖ Year-to-date financial statement for current fiscal year
- ❖ List of companies and foundations being approached to fund this proposal, with dollar amounts, indicating which sources are committed, pending or anticipated.

Feel free to contact Alane Harrington Wallis at (617) 439-2498 or awallis@nutter.com with any questions.

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