Thank you for your interest in applying for the Nonprofit Learning Institute, presented by the Bank of America and Philanthropy Massachusetts. All questions in this application are required, so make sure to answer all questions to the best of your ability.

The Nonprofit Learning Institute (NPLI) is comprised of a series of technical assistance and capacity building sessions. Twenty nonprofit organizations from a broad cross-section of the nonprofit sector will be selected to participate. To each session, each organization is encouraged to send two representatives. Session material is designed for senior staff members, as well as board members. Sessions will be led by experts from leading service organizations and/or consultants in each topic area. In addition to the sessions, there will be a number of supplementary opportunities to meaningfully engage, network, and share experiences with your peer participants.

Nonprofit Learning Institute Session Descriptions:

- **Launch of Nonprofit Learning Institute (January 7, 2020, 8:00am - 8:30am)**
  This will be the orientation for the Nonprofit Learning Institute. During this orientation, we will go over goals and expectations for the program, as well as learn more about the organizations in the program.

- **Board Engagement & Development (January 7, 2020, 8:30am-12:00pm)**
  This session will focus on engaging and developing a board; purpose, roles and responsibilities of the board of directors; opportunities for board leadership; and, strategic board recruitment.

- **Capitalization & Financial Stability (February 11, 2020, 8:00am-12:00pm)**
  This session will cover the fundamentals of nonprofit finance including: how to read income statements and balance sheets and how to assess your organization’s financial picture, as well as a framework for understanding full costs. The focus will be on how to build financial strength over time to best support your mission and how to articulate your financial needs.

- **Communications & Marketing (March 3, 2020, 8:00am-12:00pm)**
  This session will cover marketing and communication strategies designed to help nonprofit organizations communicate their organizations’ mission and story in the most effective way.

- **Scaling & Strategic Planning (April 7, 2020, 1:00pm – 5:00pm)**
  This session will walk participants through what it means to be strategic; how an organization can do so; and a truly strategic plan should look like. In addition, the presenter will discuss methods of scaling and questions to ask when considering scaling your organization.

- **Closing Reception (April 7, 2020, 5:00pm - 7:00pm)**
This will be a closing reception celebrating the work put in by participants throughout NPLI with the opportunity to meet with other organizations who have participated in the Nonprofit Learning Institute.

Eligibility/Requirements:

- Organizations must have 501(c)(3) nonprofit status in Massachusetts
- Annual operating budget should be between $500,000 and $2 million *(Budget size should not deter organizations from applying. Organizations outside this range will also be considered. See Application Form Question 6 for details.)*
- Organizations must commit to two representatives attending all sessions
  
  *It is strongly recommended that representatives be board or senior staff members.*

Logistics:

- All sessions will be hosted at Bank of America (225 Franklin Street, 5th Floor, Post Office Square Room, Boston, MA 02110)
- Food and refreshments will be served at each of the sessions

Application Timeline:

- **September 30, 2019:** Application released
- **November 4, 2019, 9:00 am:** Deadline for application submission
- **November 18, 2019:** Participants notified of application status
- **January 2020 – April 2020:** Nonprofit Learning Institute Sessions

Application Checklist:

- Complete [online application](#) by 9:00 am on November 4, 2019
- Submit the audited financial statements for most recently completed fiscal year by 9:00 am on November 4, 2019, to: [kartuso@philanthropyma.org](mailto:kartuso@philanthropyma.org)
- Submit the current fiscal year operating budget by 9:00 am on November 4, 2019 to: [kartuso@philanthropyma.org](mailto:kartuso@philanthropyma.org)

  *Note: You may submit financial attachments by mail if an electronic copy is unavailable, as long as it is postmarked by November 4, 2019 to: Philanthropy Massachusetts, 133 Federal Street, Suite 802, Boston, MA 02110*

  *Additional materials may be required upon review of your application, including but not limited to:*
  
  - IRS 501(c)(3) Letter of Determination

  
  *Contact: If you have any questions or concerns about eligibility or timeline, please email kartuso@philanthropyma.org or call 617.426.2606 x138.*
CORPORATE SOCIAL RESPONSIBILITY AT BANK OF AMERICA
Bank of America’s commitment to corporate social responsibility (CSR) is a strategic part of doing business globally. Our CSR efforts guide how we operate in an environmentally, socially, and economically responsible way around the world, to deliver for shareholders, customers, clients and employees. Our goal is to help create economically vibrant regions and communities through lending, investing and giving. By partnering with our stakeholders, we create value that empowers individuals and communities to thrive and contributes to the long-term success of our business. We have core areas of focus for our CSR, including responsible business practices; environmental sustainability; strengthening local communities with a focus on jobs, housing and hunger; investing in global leadership development; and engaging through arts and culture. As part of these efforts, employee volunteers across the company contribute their time, passion and expertise to address issues in communities where they live and work. Learn more at www.bankofamerica.com/about and follow us on Twitter at @BankofAmerica.

PHILANTHROPY MASSACHUSETTS
Philanthropy Massachusetts, formerly Associated Grant Makers, promotes the practice and expansion of effective and responsible philanthropy to improve the health and vitality of its region. Founded in 1969, Philanthropy Massachusetts is a diverse and vibrant membership association of highly engaged philanthropic organizations and individuals with interests in Massachusetts and surrounding areas. We connect new and established donors, their trustees and staff to each other, to their communities and to emerging and relevant issues in the field. Philanthropy Massachusetts serves as a bridge between funders and fund applicants for better understanding, efficiency and impact. As a leading and influential voice and advocate for effective philanthropy, Philanthropy Massachusetts provides access to knowledge and cooperative action that enables our members to create extraordinary value for each other, their grantees and to collectively shape the future of a healthy and vibrant region. Learn more at www.philanthropyma.org and follow us on Twitter at @Philanthropy_MA.
Application to Nonprofit Learning Institute
Presented by the Bank of America and Philanthropy Massachusetts

**** APPLICATION DEADLINE: OCTOBER 28, 2018, 11:59pm ****

ORGANIZATIONAL INFORMATION

Employer Identification Number (EIN):

Organization Name:

Address: Street Address, Suite/Apt, City, State, Zip

Phone Number:

Website:

Year Founded:

Organizational Staff: # FT / # PT / # Volunteers / # Board Members

Name of Chief Executive:

Title of Chief Executive: i.e. CEO, Executive Director, President, etc.

Last Fiscal Year Actuals

Revenues: Expenses:

Current Fiscal Year Budgeted

Revenues: Expenses:

Application Contact Information

Name of Application Contact:

Title of Application Contact:

Phone Number of Application Contact:

Email of Application Contact:

APPLICATION QUESTIONS
1. Proposed Participants from your Organization in the Nonprofit Learning Institute
   a) Name of Primary Senior Staff Member (preference for organization who can send their CEO)
   b) Title of Primary Senior Staff Member
   c) Contact Email of Primary Senior Staff Member
   d) Phone Number of Primary Senior Staff Member
   e) Bio of Primary Senior Staff Member
      Please limit to 200 words of less

2. What is the Mission/Vision of your organization?

3. What is the top organizational challenge in your organization and what do you believe the Nonprofit Learning Institute will provide to help address that challenge?

4. Besides the answer to #4, what are up to three additional organizational challenges that you hope to address through the Nonprofit Learning Institute?

5. Please describe the outcomes you hope to achieve – both for your organization and as an individual – as a result of participation in the Nonprofit Learning Institute?

6. If your Organization falls outside the recommended operating budget range of at least $500,000 and no more than $2 million, please explain how your organization would benefit from the series, and indicate how your organization has the capacity to participate.

7. Through social media, we hope organizations will share key learnings, takeaways, and successes with their broader audiences. In what ways will your organization utilize social media to help raise the awareness of the Nonprofit Learning Institute (also indicate which social media outlets you plan to use)?

***Completed Application (online application & email attachments) Due By 11:59pm On October 28, 2018***