



## NONPROFIT LEARNING INSTITUTE

### APPLICATION GUIDELINES

**APPLICATION DEADLINE: November 18, 2020 at 5:00 PM**

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.

In the tenth year of the Institute, there will be an increased focus on supporting leaders of color through the work of the institute. BIPOC leaders are strongly encouraged to apply.

The Nonprofit Learning Institute is comprised of a series of technical assistance and capacity building sessions with the goal of fostering and empowering leaders in the Massachusetts nonprofit sector. Twenty nonprofit organizations from a broad cross-section of the nonprofit sector will be selected to participate. A primary contact – senior management staff or board member – will be expected to attend all sessions. Sessions will be led by experts from leading service organizations and/or consultants in each topic area. **The 2021 Nonprofit Learning Institute will be held virtually.**

#### **Nonprofit Learning Institute Session Descriptions:**

- **Launch of Nonprofit Learning Institute** (*January 12, 2020*)  
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.
- **Strategic Planning** (*February 2020*)  
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.
- **Board Engagement & Development** (*March 2020*)  
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** (*April 2020*)  
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.
- **Breaking Down Barriers to Funding** (*May 2020*)  
This session will provide an opportunity to discuss the challenges to accessing funding and ways to mitigate those challenges. Participants will also have the opportunity to chat with local grantmakers.

### 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 5 for details.*)
- A primary contact, in a senior leadership role, must commit to attending all five sessions of NPLI. *Additional organization representatives (senior staff, board members) will also be welcome to join some sessions.*

### Logistics:

- All sessions will be held remotely via Zoom.

### Application Timeline:

- **October 14, 2020:** Application released
- **October 28, 2020:** Information session
- **November 18, 2020:** Deadline for application submission
- **Week of December 7, 2020:** Participants notified of application status
- **January 2021 – May 2021:** Nonprofit Learning Institute Sessions

### Application Checklist:

- Complete [online application](#) by 5:00 pm on November 18, 2020
- Submit the audited financial statements for most recently completed fiscal year by 5:00 pm on November 18, 2020, to: [kartuso@philanthropyma.org](mailto:kartuso@philanthropyma.org)
- Submit the current fiscal year operating budget by 5:00 pm on November 18, 2020 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 18, 2020 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](mailto: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](http://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](http://www.philanthropyma.org) and follow us on Twitter at @Philanthropy\_MA.

# Nonprofit Learning Institute 2021 Application Form

Thank you for your interest in applying for the tenth annual 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 deadline for submissions is 5:00 PM on Wednesday, November 18, 2020.

This year's Nonprofit Learning Institute will focus on fostering and empowering leaders of color in the Massachusetts nonprofit sector. Session topics will include governance, strategic planning, and managing financial resources.

Contact: If you have any questions or concerns about eligibility or timeline, please contact Kelton Artuso at [kartuso@philanthropyma.org](mailto:kartuso@philanthropyma.org) or call 617.426.2606 x138.

\* Required

## ORGANIZATIONAL INFORMATION

1. Organization Name \*

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2. Address \*

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

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3. Phone Number \*

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4. Website \*

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5. Employer Identification Number (EIN)

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6. Year Founded

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7. Organizational Staff: Number of Full Time Staff \*

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8. Organizational Staff: Number of Part Time Staff \*

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9. Organizational Staff: Number of Volunteer Staff \*

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10. Organizational Staff: Number of Board Members \*

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11. Name of Chief Executive \*

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12. Title of Chief Executive \*

i.e. CEO, Executive Director, President, etc.

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**LAST FISCAL YEAR**

Please use actual totals for this section, to the closest full dollar.

13. Revenue (Actual Totals) \*

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14. Expenses (Actual Totals) \*

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**CURRENT FISCAL YEAR**

Please use budgeted totals for this section, to the closest full dollar.

15. Revenue (Budgeted) \*

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16. Expenses (Budgeted) \*

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**Participants****CONTACT INFORMATION**

The Nonprofit Learning Institute is geared towards representatives in senior leadership positions within their organizations. Primary Contacts should be a Senior Staff Member with a position of Chief Executive Officer, Executive Director or Vice President.

17. Name of Primary Senior Staff Member \*

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18. Title of Primary Senior Staff Member \*

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19. Phone Number of Primary Senior Staff Member \*

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20. Email of Primary Senior Staff Member \*

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21. Bio of Primary Senior Staff Member \*

Please limit to 200 words or less

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22. Please identify your race/ethnicity (check all that apply).

*Check all that apply.*

- American Indian and Alaskan Native
- African American, Black
- Asian, Native Hawaiian other Pacific Islander
- Caucasian, White
- Hispanic, Latino
- Decline to Answer

Other:  \_\_\_\_\_

23. Participant Agreement \*

Please confirm that your organization can commit to sending two representatives (senior staff or board member) to all sessions of the Nonprofit Learning Institute. The same two representatives do not need to attend each session.

Mark only one oval.

- Yes
- No
- Other: \_\_\_\_\_

Application Questions

24. What is the Mission/Vision of your organization? \*

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25. 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? \*

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

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27. Please describe the outcomes you hope to achieve – as an individual – as a result of participation in the Nonprofit Learning Institute? \*

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28. If your Organization falls outside the recommended operating budget range of at least \$500,000 and no more than \$2 million, please explain

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29. 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)? \*

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30. How did you hear about the Nonprofit Learning Institute?

*Mark only one oval.*

- Philanthropy MA Newsletter
- Philanthropy MA Website
- Bank of America Charitable Foundation Newsletter
- Referred by a colleague
- Twitter
- Facebook
- Other: \_\_\_\_\_

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