



# THE PLUS COLLECTIVE

## Charlotte-Mecklenburg's LGBTQ+ Community Fund

A Collective Giving and Endowment Fund of Foundation For The Carolinas

### 2023 BASIC OPERATING GRANTS – APPLICATION GUIDE

For the period July 1, 2023 – June 30, 2024

During the 2023 grants cycle, The Plus Collective (TPC) will award Operating Grants to Charlotte-area organizations serving the lesbian, gay, bisexual, transgender, and queer (LGBTQ+) community. This document is meant to guide applicants through the application process.

**Basic Operating Grants** are intended to build capacity and strengthen the effectiveness of 501(c)(3) nonprofit organizations whose primary objective is to serve the Charlotte-Mecklenburg LGBTQ+ community. Eligible organizations will provide at least 75% of their services and utilize at least 75% of their budget within the Charlotte-Mecklenburg area. Grants will be awarded to support the general operations of organizations that exemplify the vision of The Plus Collective: *Guided by principles. Inspired by diversity. Supported by community.* **Organizations may apply for either a Basic Operating Grant or PPE Grant, NOT BOTH**

**TPC has limited discretionary funds and frequently receives requests for more funds than are available to grant.** Therefore, there may be many exemplary applications that receive partial or no funding. The organization may request feedback on the decision, if desired.

To conduct a fair and ethical grants program, all TPC volunteers and staff are required to follow a Conflict-of-Interest Policy for the grant process when an organization with which they are affiliated is a grant applicant. Please do not lobby Board or Grants Committee members on behalf of your organization.

**For questions, please contact Tiara Miles at Foundation For The Carolinas ([tmiles@fftc.org](mailto:tmiles@fftc.org)).**

**Please do not submit a grant application for the following purposes, as they will not be funded:**

- Capital campaigns and endowment funds
- Hardware, software, or other similar forms of technology infrastructure
- Requests in which funds will be re-granted to other organizations
- Events from which the proceeds will benefit other organizations
- Debt retirement/deficit funding
- Projects that promote policy advocacy, political activity, or religious views
- Activities occurring prior to grant decision
- Projects that are typically the funding responsibility of federal, state, or local government
- New proposals that duplicate existing or established programs or services
- Strategic planning in “ordinary course of business”
- Publication of books (paper or digital) unless being published to be sold to raise additional funding for the organization

### GRANT REQUIREMENTS

- Grant awards must be made to eligible 501(c)(3) nonprofit organizations and applying organizations must have their 501(c)(3) status at the time the application is submitted.
- Operating Grants are only awarded to organizations whose primary objective is to provide services or benefits to the LGBTQ+ community; eligible organizations must provide at least 75% of their services and utilize at least 75% of their budget within the Charlotte-Mecklenburg area.
- Applicant organizations must attest that at least 75% of their services are provided, and at least 75% of their budget is utilized within the Charlotte-Mecklenburg area and must agree to use grant funds solely within Mecklenburg County.
- Applicants may apply for ONE Operating Grant per annual grants cycle.
- TPC Board and Grants Committee reserve the right to request additional information at any time. Failure to respond to requests for additional information may result in denial of the application and/or disqualification from future grant opportunities.
- Applicants are expected to return funds to TPC if the organization is unable to utilize the funds for the purposes specified in the application or by the grant use deadline.

### FUNDING PRIORITIES

Applicant organizations should exemplify TPC’s vision: *Guided by principles. Inspired by diversity. Supported by community.* The organizations’ services should support the following:

- Building understanding and appreciation, as well as promoting the value of inclusion within the organization’s circle of influence, for LGBTQ+ populations.
- Cultivating leadership opportunities for LGBTQ+ people.
- Engaging and including people with diverse backgrounds, sexual orientations, and gender identity in programs, services, and organizational values.

## FUNDING CONSIDERATIONS

As you complete your application, give special consideration to documenting the following criteria which will be used in making grant decisions:

- **Scope of impact:** The organization has a positive impact on its audience and the Charlotte LGBTQ+ community.
- **Effectiveness:** The organization is effective at utilizing resources to provide the services and benefits it offers.
- **Budget:** The organization's budget presents reasonable costs for services performed and an efficient way to achieve objectives.
- **Diversity:** The organization engages and includes people of color, trans individuals, and others typically underserved within the LGBTQ+ community.
- **Defined measures:** The organization identifies clear objectives and uses relevant metrics and measures to define a successful outcome.
- **Organizational experience:** The organization has the appropriate talent, skills, and experience to execute its objectives and effectively utilize grant funds.

## Before You Begin: Strategies for a Successful TPC Basic Operating Grant Application

### WHERE TO START?

- Clarify your organization's priorities and needs before doing anything else.
- Know your organization's purpose. This grant program is intended to provide unrestricted operating support. Be prepared to demonstrate the need for support and how TPC funds will benefit your organization. Requests to underwrite a program, project, or event should be submitted using a Program, Projects, and Events Grant (PPE) application. Organizations may NOT apply for both a Basic Operating Grant and a PPE Grant in the same cycle.
- **Requests for funding will be evaluated based on the information provided in the application.** Therefore, the application should make a solid case for funding.
- If there is already a similar organization or program in the Charlotte-Mecklenburg area, be prepared to discuss the potential impacts in your application. Consider: Does your organization represent an expansion or duplication of services in your area? How is your organization different or better suited to meet the needs of the LGBTQ+ community?

#### TIP

Share your passion, your organization's strengths, and how you will make a difference through your work. Differentiate yourself from similar organizations.

### PREPARING YOUR APPLICATION

- Carefully review the application guidelines and be certain that your request aligns with TPC's vision and priorities.
- **Review all application questions before beginning and decide how to use the questions to tell your organization's story.**

- **Be specific and answer the questions in the application thoroughly. The application should stand on its own and include all information necessary for evaluation without a need for explanation or follow up questions.**
- **Identify clearly defined goals and measurements, including quantitative metrics (e.g., numbers, counts, percentages, etc.) that will be used to track progress and measure success.**
- Content from past applications should only be reused when it appropriately answers an application question. **Do not simply copy and paste content from past applications.**

## ENSURE THE APPLICATION IS COMPLETE

The Foundation For The Carolinas provides a dashboard to help applicants plan for the information that will be required for the application and to help identify missing information.

Generally, the following information is required:

- **Basic information on the organization:**
  - Mission statement
  - Legal name or DBA
  - Federal Tax ID number
- **Financial information:**
  - Include budget vs. actual dollars and total income and expenses for the year, including salaries and other overhead expenses whenever possible. **Use the example provided below and ensure that all information is provided. Failure to provide the requested information in the proper format may result in your application being denied.**
  - Include a breakdown of the organization’s income sources (e.g., board contributions, member dues, individual donations, corporate sponsorships, foundation grants, ticket sales, etc.).
  - Include an explanation for any substantial changes in income or expenses year over year and how the organization is addressing the changes.
- **Narrative or needs statement:** Knowing the organization’s priorities or programmatic needs before beginning the application will help with this section. Describe not only why your organization is requesting support from TPC, but also **how and why it aligns with TPC’s priorities.**
  - Be clear and succinct in your responses.
  - Identify the problem to be addressed and the needs to be met with the funding. What unique service(s) would the community be deprived of if funding is not received? Provide supporting data whenever possible.
  - Describe your organization’s objectives, activities, strategies, staffing, and partners.
  - Consider specifying your plans for ongoing progress at the termination of the grant, particularly if operating expenses are projected to increase and/or if overall funding for the organization has or is expected to decrease. List other financing sources or strategies that are being sought or developed.

### TIP

Almost all funders request at least two years of financial statements that include budget vs. actual dollars. Profit and loss or bank statements alone will not meet this requirement.

- **Goals and metrics:** What does the organization plan to achieve? Describe the goals and overall impact of the organization, and **include quantitative metrics (e.g., numbers, counts, percentages, etc.) that will be used to track progress and measure success** of the organization. Be specific and minimize subjectivity wherever possible.
- **Attachments:** Budgets, IRS 501(c)(3) determination letters, NC Solicitation License letters, Board of Director and/or staff list, letters of support from project partners (if applicable), etc.
  - **Use the format in the example provided below and ensure that all information is provided. Failure to provide the requested information in the proper format may result in your application being denied.**
  - Board and staff list should include the office held for board members and titles for staff members.

## TEMPLATE FOR PROVIDING FINANCIAL INFORMATION

Below is a sample template for providing financial information for your grant application. You are **required** to provide financial information for your organization **in this budget vs. actual format** for your two previous fiscal years **and** your current fiscal year (3 years of information in total). You may also consider providing the projected budget for your coming fiscal year. A few tips on presenting your financials are as follows:

- **Clearly label your period of performance for the budget information you are providing. Is it an entire fiscal year, or in the case of the current year, is it less than a complete year?**
- **Current fiscal year budget and year-to-date (YTD) actual results should include the following information: clearly labeled period of performance, income/expense category, annual budget, YTD actuals.**
- **Prior two fiscal years' budget compared to actual results should include the following information: clearly labeled period of performance, income/expense categories, annual budget, year-end actuals. You may also include variance (+/-) information.**
- **Logically group your revenue and expense categories so that reviewers can clearly understand your income sources and expenditures.**
- **Do not present your financial information by month.**

**Your Nonprofit Name Here**  
**Sample Budget vs. Actual**  
 July 1, 2022 - June 30, 2023

	Total	
	Actuals	Budget
<b>Revenue</b>		
<b>Earned Revenue</b>		
Ticket Sales	14,289.00	17,000.00
Product Sales	5,175.26	6,000.00
<b>Total Earned Revenue</b>	<b>\$ 19,464.26</b>	<b>\$ 23,000.00</b>
<b>Contributed Support</b>		
Contributions - Individual	20,000.00	25,000.00
Contributions - Corporate	7,825.52	10,000.00
Grants	50,000.00	45,000.00
Fundraising Events	20,000.00	17,000.00
<b>Total Contributed Support</b>	<b>\$ 97,825.52</b>	<b>\$ 97,000.00</b>
<b>Total Revenue (Earned + Contributed)</b>	<b>\$ 117,289.78</b>	<b>\$ 120,000.00</b>
<b>Expenditures</b>		
<b>Administrative Expenses</b>		
Salary & Benefits	53,840.00	46,455.00
Insurance	926.00	2,200.00
Postage & Supplies	656.22	300.00
Technology/Website	700.00	652.00
Other Administrative Expense	628.00	1,300.00
<b>Total Administrative Expenses</b>	<b>\$ 56,750.22</b>	<b>\$ 50,907.00</b>
<b>Marketing &amp; Development Expense</b>		
Advertising & Printing	5,125.58	6,000.00
Fundraising Expense	201.15	500.00
<b>Total Marketing &amp; Development Expense</b>	<b>\$ 5,326.73</b>	<b>\$ 6,500.00</b>
<b>Equipment Expense</b>		
Equipment	7,716.03	15,000.00
<b>Total Equipment Expense</b>	<b>\$ 7,716.03</b>	<b>\$ 15,000.00</b>
<b>Program Expense</b>		
Counseling	<b>\$ 23,500.00</b>	<b>\$ 25,000.00</b>
Youth Support Group	<b>\$ 5,930.00</b>	<b>\$ 4,400.00</b>
<b>Total Program Expense</b>	<b>\$ 29,430.00</b>	<b>\$ 29,400.00</b>
<b>Occupancy Expense</b>		
Rent	17,000.00	16,000.00
<b>Total Occupancy Expense</b>	<b>\$ 17,000.00</b>	<b>\$ 16,000.00</b>
<b>Total Expenditures</b>	<b>\$ 116,222.98</b>	<b>\$ 117,807.00</b>
<b>Net Revenue</b>	<b>\$ 1,066.80</b>	<b>\$ 2,193.00</b>

## 2023 TPC BASIC OPERATING GRANT CYCLE OVERVIEW

### Online registration

- Before applying for a TPC grant, all applicants must complete an online registration on the Foundation For The Carolinas website.
- **IF YOU HAVE PREVIOUSLY REGISTERED FOR A PRIOR YEAR GRANT CYCLE, PLEASE USE THE SAME REGISTRATION INFORMATION.**

### Application availability

- Grant applications will be available online at <https://fftcgrants.communityforce.com> beginning Monday, January 9, 2023.

### Deadline to submit application

- **Friday, February 17, 2023, 12:00 NOON ET**

### Grant application review

- The Grants Committee reviews all grant applications, and TPC's Stakeholders (donors of \$1,000 or more annually) also have the opportunity to review grant applications and provide their input on grant awards.
- If there are questions on an application, a member of the Grants Committee will reach out to the primary contact listed on the application. Please respond promptly to any questions received. However, **applications are expected to stand on their own.**

### Grant evaluation reports

- TPC takes its governance role very seriously and must ensure that grant award funds are spent appropriately and as intended. With limited funds to award, TPC also monitors the effectiveness of funds spent to ensure grants are prioritized effectively and meet community needs.
- Each grant recipient is therefore required to submit an evaluation report, outlining the results and effectiveness of how the funds were spent. **Failure to provide an evaluation report as required may jeopardize future grant participation and may result in a request to return the funds.**
- Evaluation reports are also used for TPC communications and may be considered in future grant decisions for your organization. This "state of the organization" summary helps TPC understand the results and impact that were achieved using the Operating Grant funds.
- **Evaluation Reports for Basic Operating Grants will be due June 30, 2024** (reporting period July 1, 2023, to May 31, 2024)

### Deadline for using grant funds

- Basic Operating Grant funds must be used on or before May 31, 2024. Funds that are not used by this date must be returned to TPC.

## 2023 BASIC OPERATING GRANT CYCLE TIMELINE

<b>December 19, 2022</b>	<b>Application Guide available on FFTC website</b> <ul style="list-style-type: none"><li>• Interested applicants may contact TPC with any questions</li><li>• Grants Committee members will be available to meet with organizations on an ad-hoc basis to discuss the process and to answer questions</li></ul>
<b>January 9, 2023</b>	<b>Operating Grant Application available online</b> <ul style="list-style-type: none"><li>• Applications are completed online at <a href="https://fftcgrants.communityforce.com">https://fftcgrants.communityforce.com</a></li><li>• Draft applications can be saved and completed later, if necessary, but must be completed and submitted by the application deadline</li></ul>
<b>February 17, 2023 12:00 NOON ET</b>	<b>Operating Grant Application Deadline</b>
<b>March 2023</b>	<b>TPC Grants Committee and Stakeholders review applications</b> <ul style="list-style-type: none"><li>• Applicants may be contacted to provide any required information that is missing from the application and/or to provide supplemental information</li></ul>
<b>Mid-May 2023</b>	<b>Notification of grant awards</b> <ul style="list-style-type: none"><li>• Grant award decisions will be e-mailed to all applicants</li><li>• Grantees will be invited to a public announcement of 2023 grants</li></ul>
<b>June 30, 2023</b>	<b>Distribution of funds to grantees upon receipt of grant acceptance and agreement to provide evaluation report</b>
<b>June 30, 2024</b>	<b>Operating Grant evaluation reports due</b> <ul style="list-style-type: none"><li>• Funds must be used on or before May 31, 2024, funds not used by this date must be returned to TPC</li><li>• All Operating Grant evaluation reports are due by June 30, 2024</li><li>• Evaluation report should cover the period from July 1, 2023, to May 31, 2024</li></ul>

**BASIC OPERATING GRANT APPLICATIONS CAN BE SUBMITTED BEGINNING MONDAY, JANUARY 9, 2023, AND MUST BE SUBMITTED NO LATER THAN FRIDAY, FEBRUARY 17, 2023, AT 12:00 NOON ET.**