

## 2019 Chorus Foundation Project Application

### Introduction

On behalf of the Chorus Foundation (the Foundation), Mott Philanthropic is accepting applications for project funding that advance a just transition to a regenerative economy in the United States. Prior to submitting an application, please review the [Foundation's website](#) and the [frequently-asked questions \(FAQ\)](#) about the Foundation's grant-making process.

Below is information about the Foundation, the review process, and funding requirements. We recommend reviewing and collecting all the necessary information to complete this form before beginning. We also ask that you track the total amount of time it takes you to complete this application

### Foundation Mission and Values

The Chorus Foundation works for a just transition to a regenerative economy in the United States. The Foundation supports communities on the front lines of the old, extractive economy to build new bases of political, economic, and cultural power for systemic change.

We envision an economy in which everyone can find meaningful work; an environment in which everyone has access to clean air, clean water, and a stable climate; and a democracy in which everyone has a say.

We believe that:

- The climate crisis is embedded in a larger ecological crisis, which is in turn inextricably linked to parallel crises within our political and economic systems. Communities of color and working class communities are on the front lines of these crises, and they are already experiencing disproportionate impacts.
- To respond to these crises, we must reclaim our democracy and move from the extractive economy to an economy that is restorative of people, place, and planet. The economic alternatives we require are already possible, but they are unsung and under-resourced.
- As an essential step in this process, we must eliminate the fossil fuel industry's undue influence on our democracy, and accelerate the end of the extraction, export, and use of fossil fuels. This particular transition is inevitable, but we will have to work hard to ensure that it is both timely and just.
- We will not be able to address the climate crisis without a broad-based social movement that demands deep systemic change. We have been inspired by the work happening in local communities across the country, and we believe that their leadership is essential to the collective future that we all want to see.

### Funding Requirements

Grants are paid in annual installments. For two-year grants, the second grant payment will be paid following the review of an interim report on the first year of activities that demonstrates

satisfactory progress on the goals stated in the proposal, continued overall fiscal and organizational health, and continuity of leadership.

All organizations will be required to submit a final report within one month after the end of the grant.

For all reports, your organization is required to complete both a narrative email that will be distributed to all other Chorus Foundation grantees and an online report submitted through this grant system.

In addition to these reports, site visits with Foundation trustees and Mott Philanthropic staff may also be requested. If the Foundation is funding an event, such as a meeting or conference, please ensure that [Cuong Hoang](#) is aware of the event dates, should a representative of the Foundation wish to attend.

### **Questions and Additional Information**

- If you have any questions about the content of your proposal, please contact Cuong P. Hoang, director of programs at Mott Philanthropic, at [cphoang@mottphilanthropic.com](mailto:cphoang@mottphilanthropic.com).
- If you have any questions regarding this online application process, please contact Mott Philanthropic's grants manager, [Paula Lentoni](#).
- The Foundation reviews proposals on a rolling basis.
- You *do not* need to send a hard copy of this application via postal mail.
- Once submitted, your proposal may take up to one month to be reviewed. If you require a grant payment on a faster timeline, please contact [Cuong](#) and we will make every effort to process a grant check as quickly as possible.

### **Suggestions for a Successful Application Submission**

- The software developers recommend that you avoid using Google Chrome to complete your online application.
- To return to your in-progress application at a later time and to avoid creating another application form, please use the link to the [Home Page](#) to access your organization's main online account (not the grant link) included here and in the email with this invitation.
- Complete the Goals, Objectives, Projected Outcomes, and Evaluation Methods sections of the application in a Word document and then copy/paste them into the application form.
- If you leave out required application information, the system will not allow you to submit without completing the missing section(s). You must then select "Update" and then "Submit" to finish the submission process.
- Confirm application submission by looking on your login page for a "Thank You" notification at the top of the page and/or a listing of the completed application in the "Submitted Application" section at the bottom of the page.

## Instructions

Below is a list of required documents necessary to complete your submission. Please refer to the table on the Attachments page for required file formats and uploading instructions.

Please be advised that, in addition to the attachments, you will need to complete a few questions about your organization and funding request within this online application.

### Required Attachments

#### 1. Narrative:

*Please upload a narrative as a Word or PDF document. You may respond to the specific questions below, or you may submit a previously approved narrative which has been reviewed by staff, or a proposal you drafted for another Foundation. Below is suggested content for your narrative.*

#### Organizational Background

- Briefly describe your organization's history, noting key accomplishments.
- Summarize your theory of change. Please highlight how this theory of change relates to the Foundation's mission and values, particularly how your organization is building a new base of political, economic, or cultural power for systemic change and a just transition.
- Provide an overview of your organization's major programs.
- State your organization's major goals for the next 3-5 years.

#### Project Description

- Describe the rationale or need for the project and how the project connects to the Foundation's mission and values.
- Provide an overview of the project design and key activities to be undertaken, including how your organization is qualified to execute these activities. Describe how the project will advance building a new base of political, economic, or cultural power for systemic change
- Describe what you hope to learn from this project.

**Please note:** *The Foundation cannot support the lobbying expenses of any project or of any organization that is utilizing a fiscal sponsor. Our definition of lobbying conforms with the [IRS definition](#).*

*If you have a question about whether your proposed project includes lobbying, please follow up with [Caitlin Hamood](#).*

#### 2. Timeline/Work Plan for the Grant Period:

*Please include a timeline or work plan of activities to take place during the grant period.*

### **3. Project Budget and Narrative:**

*Please submit a project budget that includes both expenses and revenues. Personnel expenses should describe each position funded and the full-time equivalent (FTE) allocated to the project. Revenues should describe secured and anticipated sources as well as any prospects; revenues should name specific foundations from which funding is secured and sought. A budget narrative that provides a more detailed description of budget lines should accompany the budget. This information may be uploaded together or individually.*

*Please note, the Foundation cannot support any lobbying expenses.*

*For your convenience, this application includes a Financial Proposal Template that you may use to capture your project budget. However, the Template is not required, and you may use a format of your own choosing as long as it captures the information requested above. Please click on the **Financial Proposal Template** link at the top of the screen to download this form. Instructions for completing the template are included at the beginning of the form. After you have filled it out, please save it in Excel format and upload it as an attachment. Please ensure that the figures entered on the Financial Proposal Template correspond with the budget information in your application.*

### **4. Most Recently Completed 990:**

*Please upload the organization's most recently completed 990.*

### **5. Audited Financial Statement, CPA Review, or Alternative Financial Documents:**

- A.** Most recently completed Audited Financial Statement \*, **OR**
- B.** Most recently completed CPA Review, **OR**
- C.** Statement of Financial Position AND Statement of Financial Activities (defined below)

*\*Including the Management and Internal Controls Letter, Notes Disclosure, and Required Communication to those Charged with Governance.*

- Statement of Financial Position (aka Balance Sheet) for your most recently ended fiscal year: *The Statement of Financial Position, also known as a Balance Sheet, shows what the organization owns - its assets; what the organization owes - its liabilities; and the difference between its assets and liabilities - its net assets or net worth.*

- Statement of Financial Activities (aka P&L Statement) for your most recently ended fiscal year: *The Statement of Financial Activities serves the same role as a profit-and-loss statement. This statement categorizes all income and expenses, showing net surplus or net deficit. Please include a corresponding column for the organization's budget for the most recently-ended fiscal year.*

*Please note: To be eligible for funding, **all grantees receiving \$50,000 or more in cumulative funding** from the Chorus Foundation in any one calendar year will be required to submit an Audited Financial Statement or CPA review covering the most recently completed fiscal year if:*

*A. The grantee's annual revenues are between \$250,000 and \$499,999, in which case either a CPA Review or Audited Financial Statement is required); **OR***

*B. The grantee's annual revenues are above \$500,000, in which case an Audited Financial Statement is required.*

*If upon award the grantee does not have the applicable CPA Review or Audited Financial Statement, this will be required by the end of the grant term.*

*Please also note that organizations receiving multi-year funding will need to submit an updated CPA Review or Audited Financial Statement, as applicable, for each year of the grant term. If you have questions about these requirements, please contact the director of programs, [Cuong Hoang](#).*

#### **4. Grantee Photographs:**

Please upload at least **two and up to five photographs** (JPEG or PNG) demonstrating your organization's work in action.

These photos should be at least 500 to 700 pixels wide. One of the photos will be uploaded by Foundation staff to your organization's grantee page on the Chorus Foundation [website](#)

Please list the person or organization who should be credited for the photos you are uploading.

If multiple people should be credited, please include each person's name, with the applicable photo file title in parentheses after their name.

*For example: Taylor Smith (Action.jpeg), Alex Martinez (Hike.png).*

By checking this box, I understand that by uploading these photos as part of this application, I am giving the Chorus Foundation permission to use them on its website free of charge.

I am authorized by my organization to submit these photographs.

*My name and business title are listed below.*

#### **Additional Attachments**

If available or applicable please upload the following

- **Fiscal Sponsor Agreement:**

If your organization is working through a fiscal sponsor, please upload a fiscal sponsor agreement.

Please note that **after beginning the process, you will not be able to change your fiscal sponsor**. If your fiscal sponsor changes, the process will start over from the beginning.

- **Job Description:**

If part of your funding request involves hiring new staff, please attach a draft job description.

- **Memorandum of Understanding:**

If a formal partnership or collaboration is part of your funding request, please submit a letter of support or "Memorandum of Understanding" from your partner(s).



# Grant Application

## 1. Basic Information

Some of the information in this application may pre-populate from a previous grant application. Please review and update, if necessary.

### Tax Identification Number

### Are you using a Fiscal Sponsor?

If your organization/project is not a 501(c)(3) tax exempt non-profit organization, but is being sponsored by a 501(c)(3) tax exempt non-profit organization, please select "Yes." Please upload a signed agreement between your organization and the fiscal sponsor on the Attachments page.

Please note that **after beginning the process, you will not be able to change your fiscal sponsor.** If your fiscal sponsor changes, the process will start over from the beginning.

### Fiscal Sponsor Information

If you answered "Yes" to the question above, please enter the fiscal sponsor's legal name, postal address, telephone number, name of contact, job title, and e-mail address. **If the grant is awarded, this is where all documents and checks will be (e)mailed.**

### Legal Name Fiscal Sponsor or Organization

As it appears on the 501(c)(3) determination letter

### Organization's Name

Please enter your organization's name (if different from your Legal Name).

### Organization's Acronym

Please enter any acronym or abbreviation used for your organization.

### Organization's Mailing Address

City

State

Zip Code

Web Address

(ex. www.myorganization.org)

### Year Organization was Founded

Please indicate if your organization has an Audited Financial Statement, CPA Review, or neither of these statements.

### Audited Financial Statement Details

## 2. Name and Title of Organization's Director

Title

First Name

Last Name

Suffix

Professional Title

E-mail Address

Office Phone

Ext.

## 3. Name and Title of Main Contact for Proposal

Same as Organization Primary Contact

Please check here if the main contact is the same as the organization's primary contact.

Title

First Name

Last Name

Suffix

Professional Title

E-mail Address

Office Phone

Ext.

## 4. Additional Staff Contact

Title

First Name

Last Name

Suffix

Professional Title

E-mail Address

Office Phone

Ext.

## 5. Organization Mission, Principles and Communities

Has your organization's mission changed in the last 12 months?

Mission

250 words or less.

If you have previously responded to this prompt in a prior application, you will find your response listed below. Please review and make any necessary changes.

Has your organization officially adopted or endorsed the [Jemez Principles for Democratic Organizing](#)?

If you answered "Yes," please explain when and why your organization adopted or endorsed the Jemez Principles and how the principles are integrated into your organization.

If you answered "No," please explain why not, and share how your organization integrates these principles and involves community members in its work and decision making, even though you may not have formally adopted or endorsed the principles.

The Chorus Foundation has made long-term commitments to four communities in the United States: Alaska; Buffalo, New York; Eastern Kentucky; and Richmond, California.

Please select any of the communities your organization works with and elaborate below.

If you are working with one or multiple of the communities mentioned above, please detail the nature of this involvement and elaborate on the partnerships in each community.

## 6. Leadership, Staff, Volunteers, and Board

Is your organization's executive director a person of color?

Does your executive director identify as Hispanic or Latino?

What is your executive director's race?

You may select up to two choices.

If you selected "other race," please elaborate in the space below.

Please characterize your organization's staff by the following qualities.

Total Number of Full-Time Staff

If you have no full-time staff, please enter 0.

Total Number of Part-Time Staff

If you have no part-time staff, please enter 0

### Total Number of Volunteers

If you have no volunteers, please enter 0.

Please characterize your organization's board by the following qualities.

### Total Number of Board Members

If you have no board members, please enter 0.

## 7. People Served by Organization

Are at least 50% of the people your organization serves people of color?

What is the background of the population your organization serves?

You may include race, ethnicity, income, education, geographic location, LGBTQ, or any additional defining characteristics of the population that you think are important to note.

## 8. Organization's Budget Information

Please use actuals for past fiscal years' budgets.

Please provide information about your organization's budget for

**A.** Your most recently completed fiscal year,

**B.** Your current fiscal year, and

**C.** Your upcoming fiscal year (projected), if applying for two years of support.

### Fiscal Year End Date

Enter the date on which your organization's current fiscal year ends.

Organization's Budget for Fiscal Year 2018

Organization's Budget for Fiscal Year 2019

Organization's Budget for Fiscal Year 2020

Please enter \$0, if this information is not available.

### Organization's Top 5 Funders

Please list the names and contributions of the organization's top 5 funders for the most recently completed fiscal year.

(ex. 1. ABC Foundation, \$55,000)

## Project Overview

### 1. Project Information

#### Project Title

#### Project Description

Please give a brief description of your proposed project (up to 500 words).

#### New or Existing Grant Request

If this request is related to ongoing support, please enter the current grant award number.  
Ex. Ongoing Support for Award #1234, XYZ Project

#### Target Population for Project

Please be specific (ex. geographic, demographic, or psychographic aspects).

#### Length of Grant

Please indicate the number of months related to this request.

#### Grant Start Date

Please provide the date you would like this grant to begin.

#### Grant End Date

Please note: A final report will be due within one month after the end of the grant term.

### 2. Budget Information

The budget figure in this section **must match** the figures on your Project Budget attachment.

#### Current Project Budget (FY2018)

#### Project Request Amount for Year One (FY2019)

#### Project Budget for Year One (FY2019)

#### Project Request Amount for Year Two (FY2020)

(If applicable).

#### Project Budget for Year Two (FY2020)

(If applicable).

#### Total Grant Request Amount

#### Additional Funding Sources

If seeking project funding from other sources, please identify each source with the request amount and the status of that request (prospect, requested, confirmed).

# Project Goals, Objectives, and Projected Outcomes

## Goals, Objectives, Projected Outcomes & Evaluation

Please list the goal(s), objective(s), projected outcome(s), and evaluation method(s) for the grant period.

A minimum of 1 and maximum of 5 goals will be accepted.

**Objectives** are defined as the efforts and actions taken to achieve the stated goal. Please be as specific as possible.

For each **projected outcome** please describe:

- interim indicator(s) (for two-year funding only) that you expect one year into the project that point to the project's potential success;
- final indicator(s) you expect at the completion of the grant period; and
- other indicators you are seeking beyond the grant period.

Please describe the **evaluation method(s)** used to determine the success of the goal(s).

### Goal One

Objective(s) for Goal One

Projected Outcome(s) for Goal One

Evaluation Method(s) for Goal One

### Goal Two

If applicable.

Objective(s) for Goal Two

Projected Outcome(s) for Goal Two

Evaluation Method(s) for Goal Two

### Goal Three

If applicable.

Objective(s) for Goal Three

Projected Outcome(s) for Goal Three

Evaluation Method(s) for Goal Three

## **Goal Four**

If applicable.

Objective(s) for Goal Four

Projected Outcome(s) for Goal Four

Evaluation Method(s) for Goal Four

## **Goal Five**

If applicable.

Objective(s) for Goal Five

Projected Outcome(s) for Goal Five

Evaluation Method(s) for Goal Five

In our continued efforts to streamline our application process, please respond to the questions below.

**How long did it take you to complete this application?**

(5.5= 5 hours, 30 minutes)

## **Feedback**

If you would like to provide any feedback regarding the application, please use the space below.