

CATALYST FUND

Fidelity Charitable® Catalyst Fund Request for Proposals for Community Foundations

Proposals Due October 18, 2024

[Apply Here](#)

RFP Summary

The Fidelity Charitable Catalyst Fund (“Catalyst Fund”) is pleased to announce a Request for Proposals (RFP) for community foundations based in priority geographies in the South Central and Mountain West United States to explore and strengthen approaches to inspire individual donors to give more now to promising nonprofits.

The Catalyst Fund will support 8-12 community foundations with project grants up to \$630,000 each that aim to engage donors and elevate nonprofits and establish a two-year community of practice among participating community foundations. We expect most grants will be for three years of efforts (maximum of \$210,000 per year) with some flexibility for shorter-term efforts as well. Proposals are due October 18, 2024 with final decisions made by February 26, 2025. Eligible community foundations can begin their application here: <https://fidelitycharitable.fluxx.io/apply/RFP2024>.

This announcement includes background information about the Catalyst Fund and important details about how to apply for funding. Pages 1-5 provide an overview of the RFP, eligibility criteria for community foundations, funding priorities and aligned projects, and impact and reporting requirements. Pages 6-9 provide an overview of application and proposal guidelines, process, timeline, and assessment criteria.

There will be two webinars to learn more about the RFP:

- September 13: 12:30 pm CST – [register here](#)
- September 24: 1:30 pm CST – [register here](#)

Any questions on applying should be directed to Kezia Stegemoeller, Senior Manager for the Catalyst Fund, at kezia.stegemoeller@fmr.com.

Please note: Given the length of time we anticipate it will take for community foundations to submit applications, all eligible community foundations that submit full applications but are ultimately declined funding through this RFP will receive a gratitude grant for your time and effort.

About the Fidelity Charitable Catalyst Fund

The Catalyst Fund is a grantmaking program of Fidelity Charitable, led by our Board of Trustees and separate from Fidelity Charitable’s donor-advised fund program.

While the Fund has supported the nonprofit sector since 1994, the Catalyst Fund recently shifted its strategy to focus on grantmaking to nonprofit organizations that engage donors with education and

CATALYST FUND

community connections and elevate nonprofits so that more donors know about their work. When donors and nonprofits partner together, we can empower communities to flourish.

The Catalyst Fund makes 40-50 grants per year to national and local intermediaries that connect donors to **promising nonprofits** either by engaging individual donors in their philanthropy or elevating nonprofits through cohort-based programs on fundraising, storytelling, and other areas that allow nonprofits to retain and sustain relationships with individual donors.

Promising nonprofits: Have an outsized impact in our communities but have experienced chronic underinvestment due to systemic barriers tied to geography or race, as well as lack of personal connection to donors and brand recognition. See *Appendix for full definition.*

The intermediaries we support focus their attention on donors and nonprofits working in South Central and the Mountain West — regions of the country that receive 3-4x less philanthropic dollars per capita than those on the coasts. Some also work to lift up nonprofits led by and serving people of color, which have historically been underinvested in despite being well-positioned to strengthen our communities.

RFP Overview

The Catalyst Fund's goal is to increase donor awareness, proximity, and effective giving to promising nonprofits for future resilience and deepened impact. As a result of the critical role community foundations play as intermediaries and bridge builders in their regions, we believe they are uniquely positioned to expand offerings to donors that inspire them to give to local nonprofits and to improve the ability of nonprofits to tell their story to donors – critical work community foundations do every day but that is often difficult to fund. During the last several years, we have made significant grants to support nine community foundations and supported two communities of practice for community foundations.

While most of the Catalyst Fund's grantmaking is by invitation only, we recognize that there are more than 200 staffed community foundations in the 16 states we focus on that are doing terrific work to inspire donors and strengthen nonprofits and that it is difficult to get to know all of their work.

Through this RFP, we hope that community foundations based in our 16 priority states that are committed to working with individual donors to inspire more granting to local nonprofits will apply for funding to support the creation or expansion of programming for donors and/or nonprofits. The Catalyst Fund will award 8-12 project grants up to \$630,000 each that aim to engage donors and elevate nonprofits. When applying, assume this funding is one-time and will not be renewed.

A Steering Committee comprised of staff from community foundations outside the 16 states and others in the sector connected to the community foundation space will advise Catalyst Fund staff on the prioritization of applications. The Fidelity Charitable Board of Trustees, including its Catalyst Fund Committee, will review recommendations and have final approval over each grant awarded greater than \$150,000.

CATALYST FUND

Community of Practice

Community foundations which receive two or three-year grants will also be part of a two-year community of practice (COP) facilitated by [CFLeads](#). All community foundations that receive a two or three-year grant must participate in the community of practice with teams of up to three people which can include staff, board members, donors, and consultants. The COP will seek to strengthen community foundation leaders and build organizational capacity. Others that apply but are ultimately not selected or that only receive one-year grants will have an opportunity to participate in free online webinars and workshops led by CFLeads. These will also be available to the community foundations in the community of practice.

The goal of the community of practice is to provide in-depth learning opportunities and support to create and implement the community foundation's goals and plans related to the objective of "inspiring donors to give more now." The COP learning opportunities will create a space for peer learning and community building among the 8-12 community foundations selected for multi-year grants and will be complimented by presentations on topics pertinent to the objective. Participating community foundations will be involved in informing the selection of topics for further learning.

Components of the community of practice will include:

- Initial interviews with CFLeads team to better understand your work and community context
- Completion of the CFLeads Community Leadership Assessment Tool
- Five meetings over the two years which will occur approximately every four months, including three virtual half-day sessions and two 1.5 day in-person convenings
- Presentations by subject matter experts and field leaders
- Ongoing coaching and support for creating and implementing action plans
- Access to field-leading best practices and curriculum around donor giving trends and inspiring large gifts to community leadership work

Fidelity Charitable staff will deliberately *not* be present for the bulk of the meetings but may join for social/relationship building activities.

Eligible Community Foundations

To qualify to apply, organizations must meet the following criteria. Applications that do not meet these will not be considered further.

CATALYST FUND

- Community foundations with an active donor-advised fund (DAF) program managing at least 25 DAFs
- 501(c)(3) public charities in good standing with the IRS and their state
- Staffed with one or more paid full-time employee
- Based in one of the Catalyst Fund's 16 priority states: Alabama, Arizona, Arkansas, Colorado, Idaho, Kentucky, Louisiana, Mississippi, Montana, Nevada, New Mexico, Oklahoma, Tennessee, Texas, Utah, or Wyoming
- Cause inclusive, not supporting one particular cause/issue (e.g., only the arts) or religion

In addition, if you are applying for a two or three-year grant, organizations must be willing to have 2-3 representatives (staff, board members, donors, or consultants) participate in a two-year community of practice among Catalyst Fund community foundation grantees.

Organizations may apply together for a collaborative grant to work on a shared effort (e.g., statewide giving day, donor education programming across community foundations, launch giving circles with shared staffing, etc.). If you plan on doing so, please reach out to Kezia Stegemoeller (kezia.stegemoeller@fmr.com) and she will provide guidance on how to adapt the application.

Beyond these core eligibility requirements, proposals will be prioritized from community foundations that have:

- Strong connections with local nonprofits, as well as other local or national organizations that support donor education and/or nonprofit professional development
- A track record of working with the community (and not just donors) to establish, prioritize and share progress on measurable outcomes that align with the community's aspirations and needs
- A history of promoting philanthropy with donors that is data-informed, intentional, inclusive, considers the needs of nonprofits, and promotes active granting today to local nonprofits

RFP Funding Priorities

Community foundations are encouraged to apply for the resources that will best work for their community to move more funding from individual donors to promising nonprofits today. Project goals could be focused on any of the Catalyst Fund's strategic priorities listed below and could combine across categories:

- **Engage Donors:** Increase donor proximity and giving to promising nonprofits through education, peer connection, and access to credible nonprofits

CATALYST FUND

- **Elevate Nonprofits:** Increase nonprofit learning and results about what it takes to attract, retain, and connect more deeply with individual donors
- **Field Building:** Strengthen the ecosystem of organizations that engage donors and elevate nonprofits by increasing research on donor giving behavior, collaboration, and funding for these organizations

Aligned Projects

The resources funded should be catalytic in nature, meaning they allow community foundations to expand their existing efforts to work with donors and nonprofits (either working with more donors and nonprofits or going deeper), as opposed to maintaining existing programs at their current levels. For example, they might allow you to spend significantly more time with donors on their giving approaches than you currently do; greatly expand the marketing efforts of a Giving Day you manage; launch new giving circles you otherwise could not do today, etc.

Community foundations can work with all kinds of individual donors through their proposed efforts, whether it is their own DAF holders, the DAF holders of other DAF sponsors, community members that do not currently engage with the community foundation, or a combination. While Catalyst Fund staff may be able to invite Fidelity Charitable donors to your engagements to support your working with more donors, we cannot guarantee we will have the capacity to do this for all opportunities.

Based on conversations we have had with dozens of community foundations in our priority states and several pilot grants we have made to community foundations, it is likely that the following kinds of efforts will work best to meet these project goals:

- Staffing, professional development, and technology for philanthropic advising, philanthropy workshops, and nonprofit matchmaking
- Resourcing for community events that educate donors about local community opportunities and issues and events bringing donors and nonprofits together
- Starting or expanding giving circles, giving days, or field of interest funds
- Matching campaigns to drive more funding to local nonprofits
- Fundraising training and coaching for local nonprofits that emphasizes engaging with individual donors
- Storytelling, marketing, volunteer engagement, board member matching, and impact assessment training and coaching for local nonprofits that eventually supports individual donor engagement
- Evidence gathering to understand the effectiveness of the types of efforts shared above

CATALYST FUND

Community foundations may want to expand existing efforts, hire new staff or consultants, purchase new technology, produce or expand events, or bring in programs that have worked in other communities. For example:

- Center for High Impact Philanthropy offers a [High Impact Philanthropy Academy](#) for donors that can be brought to local communities
- [Freedom School for Philanthropy](#) is a philanthropy curriculum for wealthy individual donors and families who are earnestly interested in centering equity in their philanthropic practice. They have brought this offering to staff at the Seattle Foundation, next-generation donors of Fidelity Charitable, and others.
- Philanthropy Together partners with CFLeads to work with community foundations through [Launchpad for Hosts](#) and custom supports to expand or launch new giving circles
- [Somos El Poder](#) provides fundraising training and coaching to Latinx nonprofits, with an emphasis on major gifts. In addition to their regional Fundraising Con Ganas events, they have provided a custom cohort training for the Silicon Valley Community Foundation

If a community foundation includes funding to bring in any consultants or third parties, they should vet those opportunities directly to see if they are a fit and to understand costs and timelines.

Project Size Considerations: We realize that by offering up to \$630,000 total over three years for funding (\$210,000 per year), that creates a high level of openness to different ideas. We expect that most organizations will apply for two or three-year grants in the \$110,000 - \$210,000 range per year. This could allow you to hire at least one staff member and have some resources to support your donor or nonprofit engagement work as well. But there are several reasons you might apply for something smaller and still be a great fit for funding:

- **Short-term evidence-building support:** Before you're ready to go bigger, you need short-term funds to gather evidence that shows if your programs for donors or nonprofits actually increase the confidence of donors or nonprofits and inspire more local giving
- **Short-term efforts to improve organization before ready to apply:** You read through what we're looking for in a community foundation and realize you need to do more internal work before feeling ready to apply for a larger grant – such as working with your board on the importance of incorporating community/nonprofits into your efforts; putting in the work to apply for the Community Foundations National Standards accreditation; etc.
- **Sustainability concerns:** You do not want to hire staff because you do not think that you'll be able to afford keeping that person after the grant ends, so instead you apply to bring in a program, run a matching campaign, provide professional development to existing staff, or update existing technology that matches donors and nonprofits

CATALYST FUND

- **Leverage ratio concerns:** You have great ideas but don't think you will be able to show that donors actually move enough new money to promising nonprofits to justify higher project expenses so you apply for less funding

Not a Fit: Projects that would not be a good fit include:

- Efforts that focus on educating or raising money from institutional foundations or corporations (since those would not focus on individual donors/most DAF holders)
- Campaigns to raise planned gifts or endowment gifts into the community foundation (since that would not move the money now to promising nonprofits)
- Initiatives that move money for scholarships or individuals (since that would not move money to nonprofits)
- General nonprofit management training (since that would not directly bolster fundraising efforts)
- Projects that only emphasize one issue or cause area (since that may limit the donors or nonprofits interested in efforts and is not aligned with Fidelity Charitable's mission)

Impact Assessment & Reporting Requirements

As community foundations consider applying for funding, we want to be upfront about the key data we will be seeking to understand and collect throughout the grant period. Within six weeks of receiving funding, grantees will select indicators they want to track during the grant period from a menu of options. The Catalyst Fund collects annual reports once per year and holds 30-minute informal Zoom calls every six months. All grantees receive access to free coaching from [TCC Group](#) to support selecting indicators to track and to complete their grant reports.

Leverage Ratio: Because of the focus on moving money today to local nonprofits, one of the key metrics we track is Leverage Ratio: how much funding are you able to influence that individual donors give to promising nonprofits relative to the costs you spent influencing/raising that funding. For example, if you request \$50,000 to launch and staff two giving circles over three years, will you be able to show by the end of the grant period that more than \$50,000 was distributed to local nonprofits as a result of this effort, either via the giving circles themselves or by inspiring your DAF holders to give to the nonprofits the giving circles select?

Please see Appendix A for the full set of data grantees will need to provide based on the type of efforts they end up implementing with funding.

CATALYST FUND

Funding to Support Community of Practice Participation & Reporting Requirements

To support data collection from the donors and nonprofits you work with, time to complete grant reports, time you spend on check-in calls with us, as well as participation in the community of practice, we will add \$10,000 per year on any multi-year grants. That funding should be included as a line item in your budget or specifically noted in the staffing portion of your project budget.

In addition, CFLeads will arrange for your direct travel and accommodation costs to be paid or reimbursed for your participation in in-person community of practice sessions.

How to Apply & Proposal Guidelines

To apply for funding, community foundations must submit a proposal via the Fidelity Charitable Catalyst Fund grants portal at: <https://fidelitycharitable.fluxx.io/apply/RFP2024>. Proposals must be submitted by **October 18, 2024 at 5:30pm MST/6:30pm CST**.

Proposals will be submitted via Fluxx and should include requested documents. Most proposal questions are open-ended and there are no character limits to your answers. The full set of questions and document requests are available in Appendix B.

Because up to 12 people will be reviewing your proposal, you may want to consider how long your answers are to ensure your responses are fully appreciated.

For your project budget, please consider the following:

- Grants can go up to \$630,000 total up to three years for a maximum of \$210,000 per year
- You may use any format you wish but should include revenue vs. expenses
- You will be asked to report back annually on a budget vs. actual, so ensure the categories you submit are trackable within your accounting system. You do not need to specifically track how the Catalyst Fund grant funds are spent – just the overall project efforts
- We strongly believe in including staffing and the indirect costs associated with the projects we fund, and in supporting community foundations that encourage the same in their grantees. We encourage you to apply for what you fully need to carry out this work. Project budgets that do not include indirect costs or include them at only 10% (a historically low benchmark perpetuated in philanthropy that undercuts nonprofit sustainability) will be asked for further explanation or to resubmit
- For any applicants requesting two or three years of funding, please include a line item for \$10,000 per year for “Evaluation & Community of Practice Participation.” The \$10,000 per

CATALYST FUND

year is included in the maximum request you can make of \$210,000 per year. You do not need to include funding for travel to the Community of Practice – that is separate

- For any community foundation with an operating budget (i.e., non-grant expenses) greater than \$1M, extra preference will be given to applications where the community foundation is able to use some of its own funding or raise funding from a local funder/DAF holder to support some of the work (e.g., contribute 25% of the costs of a new FTE)

Process & Timeline

What to Expect	When to Expect It
Information Webinars	September 13 & September 24
Proposal Submission Deadline	October 18
Catalyst Fund Staff Reviews Applications	October 21 – October 25
Steering Committee Reviews Applications	October 28 – November 22
Finalists Notified & Request for Conversation	November 22
Finalist Conversations with Catalyst Fund Staff	December 2 - December 20
Updated Proposals Due	January 17
Fidelity Charitable Board Meeting for Review	February 25
Grantees Notified	February 28
Community of Practice Kick Off Call	March TBD
Measurement Baselines & Goals Due	April 18

Application Review & Key Assessment Criteria

Catalyst Fund staff will review all applications that we receive and move ~15 to a Steering Committee. A list of Steering Committee members is available in Appendix C.

Catalyst Fund staff will meet with finalists in December for up to an hour to ask clarifying questions and better get to know the team applying. Finalists will have a chance to submit a final proposal and project budget based on feedback from the staff and Steering Committee.

Applications must meet all 5 criteria outlined on page 3 under “*Eligible Community Foundations.*”

CATALYST FUND

Qualified applications will be assessed based on the following criteria, understanding that even funded applicants may not meet all of these criteria:

- **Organizational Qualities:**
 - Leadership on the board and staff are representative of the community the foundation aims to serve, including representation from the nonprofit sector
 - Track record of promoting philanthropy with donors that is data-informed, intentional, inclusive, considers the needs of nonprofits, and promotes active granting today to local nonprofits
 - Community Foundations National Standards Accreditation
 - Track record of funding the full indirect costs of nonprofit projects (i.e., more than 10%) when community foundation staff/board has discretion over funding decisions
 - History of measuring and evaluating its own impact on advancing community opportunities and needs, with input from community stakeholders
- **Strategic Fit:** Projects proposed advance the goals shared under “*Aligned Projects*” and do not include elements listed above in “*Not a Fit*”
 - **Engage Donors:** Increase donor proximity and giving to promising nonprofits through education, peer connection, and access to credible nonprofits
 - **Elevate Nonprofits:** Increase nonprofit learning and results about what it takes to attract, retain, and connect more deeply with individual donors
 - **Field Building:** Strengthen the ecosystem of organizations that engage donors and elevate nonprofits by increasing research on donor giving behavior, collaboration, and funding for these organizations
- **Potential for Impact:**
 - Community foundations have some evidence that the programs they are looking to expand or implement have successfully inspired donors to shift their giving to local nonprofits or increased the skills and confidence of nonprofits to raise funds from individuals and/or DAF holders
 - There is a high likelihood that the project will yield more funding for local nonprofits from individual donors or DAF holders than the cost it takes to implement
 - The application has clear project priorities and activities with an aligned budget to support implementing the efforts that shows the team will have capacity to meet its goals

CATALYST FUND

- Evidence that the community foundation has thought through what success looks like for the grant
- **Community Support & Collaboration:**
 - A strong reputation among nonprofits in the community, including nonprofits that have historically been underinvested
 - A positive reputation as an organization that collaborates with other organizations and leaders across their community
 - For any community foundation with an operating budget (i.e., non-grant expenses) greater than \$1M, extra preference will be given to applications where the community foundation is able to use some of its own funding or raise funding from a local funder/DAF holder to support some of the work (e.g., contribute 25% of the costs of a new FTE)

Accessibility & Questions

We understand that in some cases, it may not be feasible for every applicant to apply using the grants portal in which we are accepting applications such as for technological or language reasons.

Should there be a barrier you think might be affecting your ability to apply, or should you have any questions on applying, please connect with Kezia Stegemoeller, Senior Manager for the Catalyst Fund, at kezia.stegemoeller@fmr.com.

CATALYST FUND

Appendix A: Measurement Framework and Key Indicators

Defining Promising Nonprofits

Our Definition: Promising nonprofits are organizations that have an outsized impact in our communities but have experienced chronic underinvestment due to systemic barriers tied to geography or race, as well as lack of personal connection to donors and brand recognition.

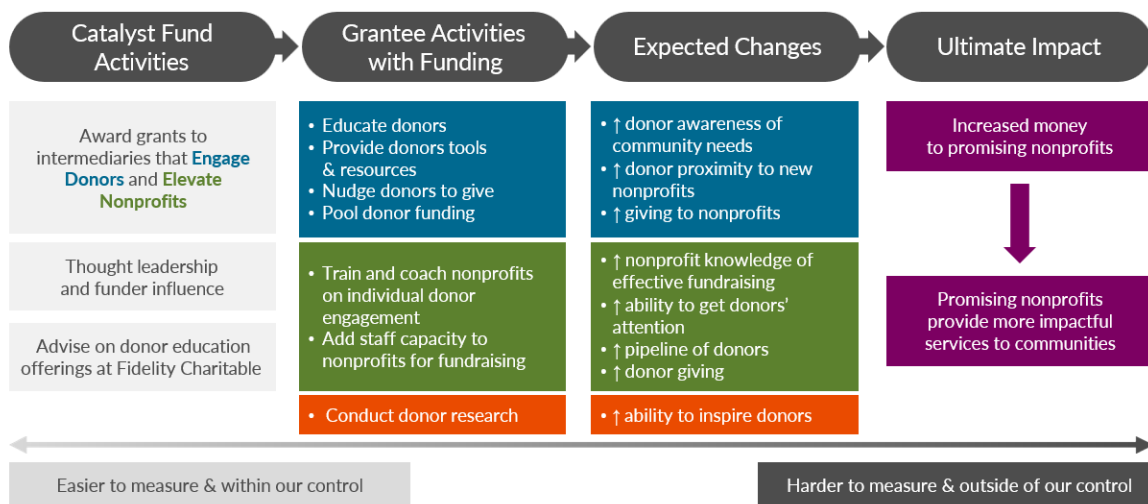
- Effective at driving positive change in our communities
- Proximate to community members and attuned to what they need. Often led by members of the community they serve and collaborates with partners to deepen impact
- Committed to learning, continuous improvement, and accountability for results to their communities
- Often do not have the access or resources to fully realize broader impact
 - Based on recent data about the nonprofits most lacking access but poised for growth, we are focused on nonprofits with budgets \$200K - \$5M in the South Central and Mountain West regions and/or those led by and serving communities of color

How Grantees Can Report Back on How They Reach Promising Nonprofits

Given there is currently no shared definition in the field of a promising/community-based nonprofit and most intermediaries have unique coding for the nonprofits they work with, we will give flexibility to grantees to report back the nonprofits that have the following characteristics:

- Budgets (ideally expenses) of roughly \$200K - \$5M; and
- Organizations that are not higher education, hospitals, think tanks/research institutes, internationally focused, or private schools
- And ideally at least one of the following:
 - Evidence of impact, such as annual reports, testimonials from community members, and evaluation data;
 - Led by and serving communities of color and/or rural communities
- We will also ask grantees to report on nonprofits they serve in the priority regions

Fidelity Charitable Catalyst Fund Detailed Impact Model



CATALYST FUND

Implications for You

- At the time of application (or this summer if you have 1+ year remaining), you will **pick targets** to understand data gaps and align on expectations
- There are **no direct consequences for missing targets**. They are for alignment and learning. But still need to ensure funding is leveraged
- You will **not need to set or report on all indicators**. Only ones relevant to your work and grant
- Will report back results to us **once per year**
- Opportunity for **1:1 coaching** with Catalyst Fund staff and/or TCC Group during application and reporting
- Funding is being offered for **data collection and reporting**

Key Indicators for Grantees

Engage Donors



Goal: Increase donor proximity and giving to promising nonprofits through education, peer connection, and access to credible nonprofits.

	Indicator	Why?
Outputs	Net Promoter Score	Understand quality and growth potential
	# of donors participating in community and philanthropy learning activities	Donors need baseline knowledge to change behavior/understand what's important to them
	# of donors participating in philanthropy values and goal-setting activities	Donors need to be grounded in <u>their</u> values to move to be proactive givers and be open to funding new organizations
Outcomes	# of donors accessing credible philanthropy sources that share information about promising nonprofits	For donors to give to new nonprofits, they need exposure to ideas and know the nonprofit has been vetted by a trusted source
	• # of promising nonprofits your organization or donors you work with directly engaged	Need to know the programs we are funding leads to nonprofits being elevated to donors and actual money is moving from individual donors to promising nonprofits
	• # of donors that give to promising nonprofits	Median and repeat giving will show how the gap in sustained giving is shifting
	• \$ donated to promising nonprofits (total and median gift)	Need to ensure Catalyst Fund grants likely turn into more giving than the amount we invested; otherwise, we should just give to promising nonprofits directly
	• # of donors that repeat giving to the same promising nonprofits	
	• Leverage ratio (\$ donated relative to costs to raise \$)	

Giving data would also show how much activity is happening in our 16 priority states.

CATALYST FUND

Elevate Nonprofits



Key Indicators for Grantees

Goal: Increase nonprofit learning and results about what it takes to attract, retain, and connect more deeply with individual donors.

	Indicator	Why?
Outputs	Net Promoter Score	Understand quality and growth potential
	# of nonprofits that learn about implementing effective individual donor giving programs	For many smaller nonprofits, they have not implemented a major gifts program that would allow them to intentionally and sustainably grow their giving
	# of nonprofits that implement donor giving programs	Need evidence that programs our grantees are implementing are leading to action - and are not just educational in nature
	# of nonprofits with evidence that they effectively use marketing, storytelling, volunteer engagement, or measurement in their work	These functions are key underlying factors that help a nonprofit get a donor's attention and sustain giving
Outcomes	<ul style="list-style-type: none"> # of nonprofit champions that show knowledge change on how to engage donors 	Smaller nonprofits with lean or no fundraising teams need a cadre of people - from board members to volunteers to staff, to help raise funds from individuals
	<ul style="list-style-type: none"> # of new individual donors supporting promising nonprofits new \$ donated by individual donors to promising nonprofits % of donors that renew support to the same promising nonprofit 	<p>Need to know the programs we are funding lead to actual money moving from individual donors to promising nonprofits</p> <p>Need to ensure Catalyst Fund grants likely turn into more giving than the amount we invested; otherwise, we should just give to promising nonprofits directly</p>

Giving data would also show how much activity is happening in our 16 priority states.

Key Indicators for Grantees

Field Building



Goal: Strengthen the ecosystem of organizations that engage donors and elevate nonprofits by increasing research on donor giving behavior, collaboration, and funding for these organizations.

Indicator	Why?
<ul style="list-style-type: none"> # of studies produced on individual donor giving, fundraising effectiveness, community opportunities, or promising nonprofit needs Evidence of what learnings are produced # of people that consume learnings Evidence that learnings are put into action 	Influencing individual donors to give to promising nonprofits is an emerging field, and so more data is needed that support organizations and nonprofits can utilize to improve their efforts
<ul style="list-style-type: none"> % of members of collaboratives that renew participation annually # of new shared resources/tools created from collaboratives # of members of collaboratives that report working together on a new project 	Efficiencies in innovating and implementing effective programs can be gained when organizations learn from each other
<ul style="list-style-type: none"> # of new funders that support organizations that engage donors and elevate nonprofits \$ new money raised by organizations that engage donors and elevate nonprofits 	Donor/nonprofit ecosystem support has minimal funding, and we should be leveraging our position to bring in more funders when feasible

CATALYST FUND

Other Data in Reporting



Brief overview of your major activities related to engaging donors or elevating nonprofits



Net Promoter Score and/or other satisfaction data



Additional **wins** or progress



Challenges and shifts as a result



Learning about inspiring donors to give, shifting donor behaviors, strengthening nonprofit fundraising



New funding in connection with Catalyst Fund support



Quotes from participating donors or nonprofits



Time to collect unique data for report and write report



Financial updates: budget vs. actual and any new audits/financial statements

CATALYST FUND

Appendix B: Proposal Questions & Document Requests

The following information will be requested via the Fluxx application portal:

Organization	
Name & Address	Grantee Organization Name; Legal Name; Acronym or AKA; Street Address; City; State/Province; Postal Code; Phone
Key Organization Stats	Tax ID/EIN Number of Full-Time Staff/Part-Time Staff Year Founded or Incubated Annual Operating Budget (Expenses) vs. Grants Budget Fiscal Year End
Status of Candid/GuideStar Demographics Section of Your Profile	Completed; Not Complete; Will Complete Within Next 3 Months
Proposal	
<i>There are no character limits to give you flexibility, but we have provided general suggestions on length to promote an equitable application and review process.</i>	
Community Foundation Background	(1) How does your organization ensure that leadership on the board and staff represent the community the foundation aims to serve, including representation from the nonprofit sector? (1-2 paragraphs) (2) Have you received a Community Foundations National Standards Accreditation in the last 3 years? If so, when? If not, why not? (1-2 sentences) (3) Do you have an active giving policy that requires regular granting from your donor-advised funds? If so, please describe. If not, why not? (1 paragraph) (4) Tell us more about your track record of funding the full indirect costs of nonprofit projects (i.e. more than 10%) when community

CATALYST FUND

	<p>foundation staff/board has discretion over funding decisions. If staff/board do not have any discretion over any funding, have you coached donors on funding the full costs of projects or giving more general operating support? (1 paragraph)</p>
<p>Strengths & Approach</p>	<p>(1) What (a) strengths and (b) solutions do you and your organization offer to build bridges between individual donors and promising nonprofits? (2-3 paragraphs)</p> <p>(2) What methods does your organization use to gather input from the community and partners, and how do you integrate this feedback into your organizational strategy and priorities? (1-2 paragraphs)</p> <p>(3) Tell us more about how you promote philanthropy with donors that is data-informed, intentional, inclusive, and considers the needs of nonprofits. For example, you might share how you've run workshops for donors on trust-based philanthropy or implicit bias when getting to know nonprofits, how you help donors align their values with their giving, how staff bring ideas to donors that utilizes local data to inspire the donor to take action, etc. (2-3 paragraphs)</p>
<p>Reach & Partnerships</p>	<p>(1) How many (a) nonprofits and (b) individual donors did you serve or reach last calendar year or in the last 12 months? Feel free to use your own definition based on how you track your reach and, if helpful, add a narrative. We understand there are tiers of reach, e.g., those who go through training vs. downloads of resources, and thus, feel free to add several figures in your response if helpful. (1-2 sentences)</p> <p>(2) Tell us about other local and national donor and nonprofit support organizations that you've collaborated within the last 2-3 years (e.g. your state association of nonprofits, local Social Venture Partners affiliate, etc.) and any you might collaborate with on this grant. (2-4 sentences)</p> <p>(3) Tell us more about how you engage nonprofits with less access to resources in your grantmaking, programming, and community engagement work. You may want to share a brief testimonial or example of how your foundation has positively impacted a nonprofit, including ones that have been underinvested in the community. Feel free to also include examples of 2-3 nonprofits we could reach out</p>

CATALYST FUND

	<p>to if needed to learn more about your track record in the community. (2-3 paragraphs)</p>
<p>Potential for Impact</p>	<p>(1) How does your organization proactively establish, prioritize, and share progress on measurable outcomes that align with the community's aspirations and needs (e.g., improve high school graduation rates, reduce homelessness, etc.)? (2-3 paragraphs)</p> <p>(2) What quantitative and qualitative evidence do you have that the nonprofits or donors you support value your work and have increased their confidence, skills, and knowledge because of the programs you've offered (e.g., recent survey data collected on your programs, Net Promoter Score data, quotes from nonprofits or individual donors who use your offerings)? (2-3 paragraphs)</p> <p>(3) Describe the track record that the program(s) you are looking to expand or implement has/have successfully inspired donors to shift their giving locally or increased the skills and confidence of nonprofits to raise funds from individual donors and/or DAF holders. (1-2 paragraphs)</p>
<p>Proposed Project Details</p>	<p>(1) Please share your key project priorities both programmatically and internally for the next 2-3 years and plans for how you would spend grant funding. This will likely be your most robust and longest answer and is your opportunity to highlight the great work your organization will focus on during the grant period. Please include key milestones and dates a rough timeline for the grant period. (4-6 paragraphs)</p> <p>(2) Please share your initial ideas for what success could look like by the time this grant is completed and what outcomes and impact you are seeking. What would put a smile on your face that this effort was successful? (2-3 paragraphs)</p> <p><i>Note: If this proposal proceeds forward, there will be an opportunity to set specific grant indicators aligned with the Catalyst Fund strategy.</i></p> <p>(3) Please provide a one-paragraph summary for how funding from the Fidelity Charitable Catalyst Fund will be utilized by your organization. Example of how you might answer this:</p> <p><i>Project grant to fund a new staff member dedicated to growing and supporting collective giving among the Community Foundation's giving circles that connect communities of color, young people, and</i></p>

CATALYST FUND

	<p>women to give to local nonprofits across the state. Catalyst Fund support will strengthen the Foundation’s relationship management technology to help us better steward donors, create education and training opportunities, expand marketing and event offerings to recruit new donors and expands community impact storytelling opportunities.</p>
<p>Grant Request Details</p>	<p>(1) Duration: Are you applying for 1, 2 or 3 years of funding?</p> <p>(2) Amount Requested: How much funding are you seeking total for this grant? (Up to \$630,000)</p> <p>(3) Do you anticipate any other funders, donors, or the community foundation itself will also provide funding for your proposed efforts? If so, please share more details. (1 paragraph)</p> <p>(4) Total Project Budget: Should be across the full duration of the requested grant. This might be the same amount as you are requesting if you do not anticipate any other revenue for this project.</p> <p>(5) Have you discussed this proposal with your board and are they comfortable with supporting staff time for implementing the project and participating in the community of practice, as well as promoting sustainability of any efforts that might need funding after the grant ends? (Yes/No)</p>

Requested Documents

Please include the following documents with your submission:

- Audited Financial Statements or 990 if your organization does not conduct an audit
- Current Fiscal Year Operating Budget
- List of Board Members & Affiliations
- Project Budget

CATALYST FUND

Appendix C: Steering Committee Members

Son Chau

Senior Manager, Charitable Consulting, Charles Schwab

Elaine Chu

Vice President, Philanthropic Strategies, Fidelity Charitable

Brennan Gould

President and CEO, Charlottesville Area Community Foundation

Sidney Hargro

Executive Director, The LeadersTrust

Nicole Kyuak

Senior Director, Philanthropic Services, San Francisco Foundation

Mary Thomas

President & CEO, CFLeads

Sarah Nathan

Executive Director, Middletown Community Foundation

David Rosado

Senior Advisor, Community Philanthropy, Council on Foundations