

## The Nonprofit Repositioning Fund Application Requirements

### **I. Preliminary Consultation with Fund Director (Required)**

The Fund Director, Nadya K. Shmavonian, is available by email ([Nadya@repositioningfund.org](mailto:Nadya@repositioningfund.org)) to schedule a preliminary phone consultation with potential applicants to discuss your collaboration concept, and the status of your deliberations to date.

Based upon this preliminary consultation, Nadya will provide guidance on next steps, which may include further actions that must be taken by the organizations before an application can be submitted. She may also request a face-to-face meeting with key leaders from the potential partner organizations to better understand the proposed collaboration, and/or to assess the respective organizations' level of commitment to the process.

Organizations may be invited to submit formal applications for:

1. Exploratory Grants (up to \$40,000) to support the one-time costs associated with evaluating the feasibility of a repositioning activity between two or more nonprofits. Exploratory grants may be used to pay for external facilitators, consultants, off-site meetings for relevant board members and staff, etc. Exploratory grants will not be available for single organizations that have not yet identified a partner.
2. Implementation Grants (up to \$100,000) to support some of the one-time costs associated with a repositioning transaction between two or more nonprofits. Implementation grants may be used to pay for the third-party costs of lawyers, accountants, consultants, early lease termination fees, moving costs, technology integration, severance, collateral materials (new business cards, signs, etc.), and other one-time costs for activities necessary to complete the repositioning transactions.

Please note that in most instances, grants will be awarded for less than the maximum dollar amount indicated above.

## **II. Application Materials**

*Applications to the Nonprofit Repositioning Fund are accepted on a monthly basis through an online portal. If you are invited to submit an application for an Exploratory or Implementation Grant, you will be expected to address the questions below. The information provided in this format is for your guidance and reference only; all applications must be submitted using the online process.*

### **Questions Requesting Information About Organizations (Exploratory & Implementation)**

Descriptions all Collaborating Organizations (please designate Lead Organization)

- Organization Name, Mailing Address, Website, EIN Number, & Primary Contact
- Executive Director's Contact
- Professional Bio for Executive Director(s) - *for Implementation Grant only*
- Reasons for Considering Collaboration:
  - (Potential) departure of one or more Executive Directors/ CEOs
  - Advancement of a shared goal
  - Competition for funding donors and/or clientele
  - Difficulty funding necessary technological initiatives
  - Difficulty in meeting external standards / requirements imposed on our organization
  - Financial problems/pressures within one or more of the partnering organizations
  - Funder initiated/mandated the collaboration
  - High / increasing costs
  - Parent organization request
  - Response to a community need
  - Response to a funding opportunity
- Mission & Core Programs (2,000 character limit)
- Current & Prior FY Operating Budgets & Most Recent Audited Financials
- Number of FTEs & PTEs
- Current Board Member List
- Primary Counties Served & Field of Work
- Open grants with the funders of the Fund:

HealthSpark Foundation

Scattergood Foundation

The William Penn Foundation

The Philadelphia Foundation

Samuel S. Fels Fund

The Barra Foundation

The Lodestar Foundation

The United Way of Greater Philadelphia and Southern NJ

## Questions Regarding Collaboration (Exploratory Grants)

Project name, timeline, and amount requested from the Fund.

### Collaboration Background & Status

- Collaboration Type
- Working relationship between the collaborating organizations (250 characters)
- Why Now? Describe what prompted you to consider a collaboration at this time (1000 characters)
- Timing of Discussions (250 characters)
- Confidentiality Concerns (700 characters)

### Benefits & Risks

- Discuss potential benefits of collaboration (5,000 characters)
  - How might the collaboration meaningfully change the way the organizations involved will operate?
  - What can you accomplish together that you cannot do separately?
- Potential Impact (7,000 characters)
  - What might the potential impact of these changes be on the individuals/communities served?
  - How do you anticipate this potential collaboration will impact other competitors in this space?
- Identify potential challenges of collaboration
- Essential Questions (4,000 characters)
  - What essential questions must be answered before your organizations can make the decision to implement a formal collaboration?
- Sequence (2,000 characters)
  - To the extent possible, identify the sequence by which you need to answer these questions (e.g., what questions must you answer first before deciding whether to proceed further in the exploration?)

### Technical Assistance Requested

- Describe the technical assistance support that is being requested from the Fund
  - Identify name, cost, and timing for each technical assistance provider
  - Submit copies of proposals from each technical assistance provider
- Identify other sources of support for this collaboration (including in-kind)

## Questions Regarding Collaboration (Implementation Grants)

Project name, timeline, and amount requested from the Fund.

### Implementation Plan

- Collaboration Type
- Board Resolutions from all organizations
- Executive Summary detailing scope, timing, and other pertinent details (7,000 characters)
- Outcomes & Metrics (4,000 characters)
  - List five expected outcomes associated with this collaboration.
  - Provide associated metrics that measure expected outcomes.
- Alternative Paths Considered (3,000 characters)
- Operating Budget(s) Post-Implementation
  - Provide Post-Implementation projected Operating Budget(s) for newly formed entity or other formal structure(s). Must include Operating Budget projections for first and second years following the implementation.

### Risks & Mitigants (5,000 characters)

- Describe the potential business risks and possible mitigants produced by this collaboration.
- Describe the integration challenges this collaboration has experienced to date.
- Potential challenges of implementing collaboration

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