The Anna+Anton Olson Legacy Fund

**2022 Emerging Nonprofit Collaborative Grant Application**

**Submit your complete Grant Application, including attachments,**

**by 5pm, Wednesday, September 28, 2022**

**to: Julie Johnson, Chisholm Trail Communities Foundation, at** **DAFGrant@chisholm-trail.org**

**Grants received by Chisholm Trail Communities Foundation after the 5pm deadline will not be considered.**

**NOTE: All grant application communication and correspondence**

**will be handled through** [**Chisholm Trail Communities Foundation**](https://chisholm-trail.org/)**.**

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**SECTION A. GRANT OVERVIEW**

The Anna+Anton Olson Legacy Fund (TAAOLF) is a donor advised fund at Chisholm Trail Communities Foundation (CTCF) honoring the lives of Anna and Anton Olson, Swedish pioneers and Texas farmers. TAAOLF provides philanthropic grants to strengthen the Georgetown, Hutto and Taylor communities through a life cycle of caring.

1. Goal of the TAAOLF Emerging Nonprofit Collaborative Grant

The grant is a collaborative effort by [The Anna+Anton Olson Legacy Fund](https://chisholm-trail.org/request-support/taaolf/) and [The Williamson County Institute for Excellence in Nonprofits, Inc.](https://www.wilcoinstitute.org/) (The Institute).

This new, multiyear grant will focus on assisting one emerging nonprofit (nonprofit) in strengthening their operations from a startup organization to a proven nonprofit with documented goals, management/organizational infrastructure, and the long-term ability to effectively serve our communities.

Through this collaboration, TAAOLF and The Institute hope the selected nonprofit will have the ability to prove and document its potential in our communities in one or more of the areas listed below.

1. Program Focus Areas

Your nonprofit must provide programs specific to one or more of the program areas described below.

* **Give underserved children and youth more opportunities to grow and learn**

Strengthen the ability of children and youth to live without abuse and neglect while providing education opportunities, nourishment and support that allow them the chance to become healthy and valuable members of our neighborhoods.

* **Foster Entrepreneurship with youth and young adults in underserved areas**

Strengthen the ability of children, youth, and young adults to understand the tangible and intangible lessons from working in the community, learning personal responsibility, hard work, customer service, self-confidence, financial literacy, and problem solving so they are better prepared to succeed as productive individuals in our communities.

* **Provide Independence and Dignity to seniors living at home**

Strengthen the ability of seniors in our neighborhoods to live at home safely, comfortably, and independently in their later years with dignity and as vital members of our communities.

1. Geographic Service Areas

Your nonprofit must serve one or more of the geographic areas listed below.

* **Georgetown, Texas**
* **Hutto, Texas**
* **Taylor, Texas**
1. Organizational Status

The nonprofit must be incorporated in the State of Texas and tax-exempt under Section 501(c)(3) of the Internal Revenue Service Code for at least the last 3 years, but not more than the last 5 years.

1. TAAOLF’s Funding Support

TAAOLF will provide a grant award for a **maximum of $50,000 funded in 3 Stages** reflecting the growth and achievements of the selected nonprofit. Upon selection, TAAOLF will provide Stage 1 Planning funding of $5,000 to the nonprofit.

The funding schedule of the remaining grant amount for the Stage 2 & 3 Implementation phases (a maximum of $45,000) will be determined in Stage 1 Planning. Funding will be tied to the completion of key goals for each Stage as developed by the nonprofit in coordination with The Institute and described in Section A.7 Three-Stage Grant Process.

Funding for Stages 2 & 3 is not automatic and is based on the completion of the key goals for the previous Stage. TAAOLF and CTCF will review each Stage Completion Report submitted by the nonprofit, as described in Section A.9 TAAOLF Reporting Requirements, and confirm that all goals have been successfully completed. TAAOLF will then determine the funding for the next Stage.

1. The Institute’s Organizational Support

The Institute, in collaboration with TAAOLF, will work pro bono and provide executive management and advisory support to the nonprofit. That support will be mutually determined and agreed upon between The Institute and the nonprofit’s Leadership at the beginning of the Stage 1 Planning phase and would reflect the current development status of the nonprofit. The Institute will provide organizational support, including appropriate management tools and templates to assist the nonprofit in completing the goals as described in Section A.7 Three-Stage Grant Process below.

1. Three-Stage Grant Process

The duration of each grant Stage is flexible. The nonprofit in coordination with The Institute will determine the length of each Stage. The overall grant process must be completed within 3 years, and the nonprofit will have support from The Institute throughout the grant process.

* **Stage 1 – Planning**
1. Upon award of the initial $5,000, slated for early November 2022, planning meetings are expected to begin between the nonprofit and The Institute.
2. Develop an initial evaluation of the nonprofit’s management and strategic environment.

1. Complete an assessment of the nonprofit that will identify and document:
	1. specific goals with detailed action plans to be accomplished in Stage 2 Implementation; and
	2. longer-term goals with summary action plans to be accomplished in Stage 3 Implementation.
2. Based on this assessment, develop proposed timelines and funding levels (from the remaining grant amount) for both Stage 2 and 3 Implementation phases.
3. Submit TAAOLF Stage 1 reports described in Section A.9 TAAOLF Reporting Requirements.
* **Stage 2 – Implementation**

1. Implement Stage 2 goals according to the detailed action plans developed in Stage 1.
2. Complete an updated assessment of the nonprofit that will reconfirm Stage 3 goals developed in Stage 1 and convert summary action plans into detailed action plans.
3. Submit the TAAOLF Stage 2 reports as described in Section A.9 TAAOLF Reporting Requirements.
* **Stage 3 – Implementation**
1. Implement Stage 3 goals according to the detailed action plans developed in Stage 2.
2. Submit the TAAOLF Stage 3 reports as described in Section A.9 TAAOLF Reporting Requirements.
3. Nonprofit’s Leadership Involvement

The commitment and participation of the nonprofit’s Leadership is required during the life of this grant. For this grant, the nonprofit’s “Leadership” is defined as all members of the Board and its executive director. It is anticipated that additional key staff and volunteers will participate, as determined by Leadership and The Institute, during the various activities in each Stage.

1. TAAOLF Reporting Requirements

During each Stage, the nonprofit’s Leadership, with support from The Institute, will submit a TAAOLF Mid-Point Progress Report as described below.

* **Mid-Point Progress Report**

This one-page report should document the progress made to date and any challenges for successfully completing the remaining goals associated with that Stage.

At the end of each Stage, the nonprofit’s Leadership, with support from The Institute, will submit a TAAOLF Completion Report as described below.

* **Stage 1 Planning Completion Report**

The report should concisely identify, document, and describe the nonprofit’s key achievements and planning goals completed in Stage 1 as well as the specific 1) goals, 2) time frames, and 3) funding levels for Stage 2 Implementation and the summary action plan and funding level for Stage 3 Implementation.

* **Stage 2 Implementation Completion Report**

The report should concisely identify, document, and describe the nonprofit’s key achievements and goals completed in Stage 2 as well as the specific 1) priorities, 2) time frames, and 3) funding levels for Stage 3 Implementation.

* **Stage 3 Implementation & Final Completion Report**

The report should concisely identify, document, and describe the nonprofit’s key achievements and goals completed in Stage 3. The Stage 3 report should also document the key actions and outcomes from Stages 1 & 2.

TAAOLF, through CTCF, will provide the nonprofit’s Leadership and The Institute with feedback on each report, as appropriate.

End of Section A

**Section B. OrganizationAL Information**

**Complete the following information.**

1. **Agency/Organization Name:** Click or tap here to enter text.
2. **Full Mailing Address:** Click or tap here to enter text.
3. **Phone:** Click or tap here to enter text.
4. **Website:** Click or tap here to enter text.
5. **Contact Name/Title:** Click or tap here to enter text.
6. **Contact Email:** Click or tap here to enter text.
7. **Federal Tax ID Number:** Click or tap here to enter text.
8. **Year Founded:** Click or tap here to enter text.
9. **Mission Statement:** Click or tap here to enter text.
10. **Which best represents your Core Mission Area:**

|  |  |
| --- | --- |
| [ ]  Healthcare[ ]  Education[ ]  Advocacy[ ]  Environment[ ]  Senior Services | [ ]  Veteran Services/Supports[ ]  Community Services [ ]  Entrepreneurship[ ]  Women/Children Services/Supports[ ]  Other, List here: Click or tap here to enter text. |

1. **Attach the following most current documents for your nonprofit:**

[ ]  IRS Determination Letter of 501(c)3 Certification Status **(*attach as separate document*)**

[ ]  IRS Form 990 or postcard 990 **(*attach as separate document*)**

[ ]  Financial statement or annual budget report **(*attach as separate document*)**

1. **Attach the following information:**

[ ]  Executive Director, including bio and length in that position. **(*attach as separate document*)**

[ ]  Current Board Members, including a brief background, list of affiliations, and year they joined the Board. **(*attach as separate document*)**

[ ]  Current strategic planning report or Board goals. **(*attach as separate document*)**

[ ]  Current Organizational Bylaws. **(*attach as separate document*)**

End of Section B

**section c. Grant Information**

**Complete the following information.**

1. **Provide a brief description of why your nonprofit is the best candidate for the Emerging Nonprofit Collaborative Grant.** (two sentence maximum) Click or tap here to enter text.
2. **Which Focus Area(s) is (are) currently being delivered by your nonprofit?**

[ ]  Give underserved children and youth more opportunities to grow and learn

[ ]  Foster Entrepreneurship with youth and young adults in underserved areas

[ ]  Provide independence and dignity to seniors living at home

1. **Which geographic area(s) is (are) currently being supported by your nonprofit?**

[ ]  Georgetown, Texas

[ ]  Hutto, Texas

[ ]  Taylor, Texas

1. **What is your nonprofit’s total annual operating budget for the current year and each of the previous 3 years**(150 word maximum)? Click or tap here to enter text.
2. **Describe the services you are currently providing to the community and the cause/issue they seek to address.** **Please include an estimate of 1) current participants served by your nonprofit and 2) future participants that could be served by your nonprofit if you are selected for this award. The estimates of participants should be listed by Program Focus and Geographic Service Areas if appropriate.** (600 word maximum) Click or tap here to enter text.

1. **Since starting your nonprofit, 1) what have been your greatest successes, and 2) what has not worked out as well as you had hoped?** (150 word maximum) Click or tap here to enter text.
2. **Currently, what are your top 3 most critical organizational challenges? Please rank, describe, and explain each challenge.** (600 word maximum) Click or tap here to enter text.
3. **How does your nonprofit collaborate with other organizations?** (150 word maximum) Click or tap here to enter text.
4. **What differentiates your nonprofit from other nonprofits in the area and why do you think your nonprofit is (or can be) best suited to provide the services described in Question 5 above.** (150 word maximum) Click or tap here to enter text.
5. **What benefits and outcomes do you hope to achieve through this grant. Please be as specific as possible.** (300 word maximum) Click or tap here to enter text.
6. **How do you hope your nonprofit will impact our communities?** (150 word maximum) Click or tap here to enter text.

End of Section C

 **section d. Checklist of Attachments**

**Confirm the following required attachments from Section B have been included in your grant submission.**

[ ]  IRS Determination Letter of 501(c)3 Certification Status **(*attach as separate document*)**

[ ]  IRS Form 990 or postcard 990 **(*attach as separate document*)**

[ ]  Current financial statement or annual budget report **(*attach as separate document*)**

[ ]  Executive Director, including bio and length in that position. **(*attach as separate document*)**

[ ]  Current Board Members, including a brief background, list of affiliations, and year they joined the Board. **(*attach as separate document*)**

[ ]  Current strategic planning report or documents. **(*attach as separate document*)**

[ ]  Current organizational bylaws. **(*attach as separate document*)**

End of Section D & Grant Application