

SOCIAL VENTURE PARTNERS PHILADELPHIA 2021 INVESTMENT CYCLE

Information Packet

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Key Dates

February 9, 2021 – Investment Cycle Announced

February 18, 2021 – Informational Webinar

Interested participants may register using this link:

<https://forms.gle/Av2W1Gp1KnFvusK39>

February 19, 2021 – Begin accepting Letters of Interest

March 5, 2021 – Letters of Interest due

March 24, 2021 – Invitation to complete Proposal sent

April 14, 2021 - Proposals Due

Weeks of April 26 and May 3, 2021 – Organizational Interviews

End of May 2021 - Investment Notifications

June 2021 to May 2024 - Agreement Period



Section I

About Social Venture Partners Philadelphia

Social Venture Partners Philadelphia is a philanthropic network, but we do more than give away money. Our mission is to foster a community of engaged leaders, strengthen social impact organizations, and invest in collaborative solutions – building powerful relationships to reduce intergenerational poverty in our region.

SVP Philadelphia uses a trust-based approach. This means we commit to:

- Offering support beyond a check,
- Providing multi-year, general operating support,
- Simplifying and streamlining paperwork,
- Being transparent and responsive in our relationships, and
- Doing our due diligence in the investment process to reduce time spent by applicants.

Powered by the United Way of Greater Philadelphia and Southern New Jersey, SVP Philadelphia is a chapter of SVP International – a global network of more than 3,400 engaged philanthropists in 40 cities worldwide. Each SVP invests in their local community and is connected to the global movement.

Investment Overview

One way we advance our mission is through our investment cycle. We fund and work collaboratively with organizations who are working to eliminate social, racial, and economic disparities and reduce poverty.

Our funding areas include:

- Housing,
- Education,
- Criminal justice policy, and
- Economic security.

We invest in groups working to advance systemic change. We do not fund groups doing direct service work unless that work is directly tied to systems change. We define systems change as work:

- Creating alternatives to inequitable systems,
- Power building or coalition building,
- Changing public narratives around an issue,
- Policy advocacy, and
- Community organizing.

Organizations that are advancing systemic change are explicit in their intention to do so, are led by and for those who are most impacted by the issue, use race and class to understand their issue, and have a root-cause analysis that informs their response.

We have learned that leaders and organizations closest to the issues have the experience, insights, and ability to alter the systems creating the issues. Given that Black, brown, and other Philadelphians of color are disproportionately impacted by the systems that produce poverty¹, this opportunity is specifically for organizations that self-identify as being led by and serving Black, Indigenous, or people of color (BIPOC).

In this 2021 Investment Cycle, we are investing capacity building support and a total of \$600,000 in up to three grantees. Individual grants may be up to \$100,000 per year. Dollars granted are unrestricted for general operating support. We commit our capacity building support and funding to grantees for three years pending a yearly review. For example, a grantee receiving a \$50,000 investment will receive a total of \$150,000 over the three-year agreement period.

¹ [According to 2017 US Census Data](#), Black Philadelphians have a poverty rate of 30% representing 199,654 individuals. For Hispanics, the rate is about 38%, representing 84,634 individuals. Both are disproportionate to the share of the population. Disaggregating data among Philadelphians of Asian descent reveal different ethnicities experience poverty at [increased rates](#).

Capacity Building Support

A key part of SVP Philadelphia's investment is providing "support beyond the check," also known as capacity building. We define capacity building as developing core skills, leadership, culture, management practices, strategies, and systems to enhance an organization's effectiveness, sustainability, and ability to fulfill its mission.

Driven by the grantee's priorities and interests, we connect individuals from our philanthropic network who bring experience in areas such as board development, fundraising, marketing, technology, legal affairs, human resources, operations, program development, and strategic planning. We also view this as an opportunity to build relationships with frontline leaders so that we can become better funders and partners to advance our shared goals.

What SVP Philadelphia brings to the table:

- Volunteers with a wide range of expertise in both nonprofit and for-profit sectors who will support you as you grow your impact.
- A commitment to working in partnership. We will listen to you and work with you to further your nonprofit's vision.

What we are looking for in a grantee:

- A willingness to share openly and partner with us to find opportunities to progress on your organization's goals and vision.
- An excitement for the process and the time to work with us.
- A commitment to letting us know when something is not working for you. That may be uncomfortable, but our best results come from honest relationships.

Capacity building begins with an assessment to understand organizational strengths and opportunities for growth that can support grantees in prioritizing potential projects. Completing the assessment can be a time-intensive process that requires the involvement of grantee staff and Board members. It also creates space to build relationships between our organizations. The assessment supports the development of a capacity building plan that will guide our work together.

Organizations interested only in a monetary contribution are encouraged to pursue other opportunities that solely provide funding.

Eligibility Requirements

To be eligible to apply, an organization must meet each of the following criteria:

- Be a nonprofit organization certified with a 501(c)(3) public charity designation by the IRS or be fiscally sponsored by one
- Employ a full time Executive Director and have an established Board of Directors
- Have a yearly operating budget between \$250,000 and \$2,000,000
- Self-identify as being led by and serving Black, Indigenous, or people of color
- Committed to work with SVP to assess organizational strengths and needs, develop a capacity building plan, and execute the capacity building plan
- Have a geographic focus on the city of Philadelphia
- Have a mission focused in one or more of the following four areas:
 - Housing
 - Education
 - Criminal Justice
 - Economic security
- Work seeks to change an inequitable system and/or addresses issues at a systemic level through (at least one must be true to be eligible):
 - Creating alternatives to current systems
 - Power building or coalition building
 - Changing public narratives
 - Policy advocacy
 - Community organizing

If you have questions about your organization's eligibility, we invite you to join our informational webinar on Thursday, February 18 (*register here:* <https://forms.gle/Av2W1Gp1KnFvusK39>) or to reach out directly to SVP Associate Eriks Dunens at eriks@svpphl.org.

Please read Section II for information about our Selection Criteria.

Process and Timeline

To apply for the 2021 Investment Cycle, please check your eligibility using the provided requirements. If you are eligible, you may submit organizational information and a letter of interest. After we review letters of interest, you may be invited to submit a full proposal and to schedule interviews with your leadership and two board members. SVP Philadelphia will then conduct an additional round of review to select recipients of our capacity building and financial investment.

Please submit your letters of interest and proposals through our 2021 Investment Cycle site:

https://my.reviewr.com/s1/site//svp_investment_cycle_21

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Data Collection and Evaluation

Our intention is that any data collected for reporting to SVP Philadelphia is beneficial to the grantee. Given the long-term nature of systems change work, SVP Philadelphia is interested in understanding how organizations are already tracking progress and impact tied to their mission.

Over the three-year agreement period, we want to gain insight into how grantees are impacted because of the relationship with SVP Philadelphia. This impact may be seen through organizational capacity or mission delivery metrics. We anticipate conversations about impact to occur regularly during the agreement period and may request year end data or insights.

Section II

Letter of Interest Guidelines

If all eligibility criteria are met, we invite you to submit a letter of interest through our 2021 Investment Cycle site: https://my.reviewr.com/s1/site//svp_investment_cycle_21. Please provide the following:

Contact Information	<ul style="list-style-type: none"> • Organization name • Tax ID number (EIN) • Contact name (first last) • Contact title • Contact email • Contact phone number • Organizational website or social media address
Organization Information	<ul style="list-style-type: none"> • Number of employees (full and part time) • Number of total FTE's (full-time equivalents) • Total Organization budget for most recent fiscal year • Amount of funding requested (up to \$100,000)
Questions to Address in the Letter of Interest	<ul style="list-style-type: none"> • How is your organization's work addressing the issue you focus on at a systemic level? • What is the long-term vision you are working toward and how are you measuring impact and progress to that aim? What success have you had? • How do you involve the people most affected by the issues you address in your work? • Which organization(s) (if any) do you currently or plan to partner with on this work? Please describe any history with Partners and successes accomplished.

We ask that letters of interest not exceed 1,350 words. There is no minimum word count, and we encourage you to be brief in responding to questions. If you would prefer to address the questions in a video recording, please upload your video to YouTube or Vimeo and provide a link. A submitted video should be no longer than six minutes.

LOI Selection Criteria

Our reviewers will score letters of interest using the following criteria to understand to what extent applicants:

- **Use a systems analysis to guide their response to the issue or opportunity they are addressing** – organization understands how systems, policy, and environment create the issue they address and how their work responds at the root.
- **Contribute to sizable impact** – organization’s potential impact has breadth (far-reaching) and/or depth (deep-reaching in a focused area or population).
- **Have demonstrated impact in achieving their mission** – organization is able to name the impact it seeks to have and demonstrate past success.
- **Use metrics that track progress and clearly link to desired systems impact** – system level impacts can take multiple years to appear; organization can demonstrate how their metrics show progress to desired systems impact along the way.
- **Include those most affected by the issue they address in their work** – people most affected by the issue are staff, board members, or otherwise intimately involved in the work of the organization and its decision making.
- **Understand and collaborate with other groups working towards shared goals** - organization sees itself in relation to others in their issue ecosystem (for example, the criminal justice reform community) or the broader poverty reduction ecosystem and engages with other groups thoughtfully to advance shared goals.
- **Are unique or differentiated from others in their ecosystem** – organization has characteristics, approach, or outcomes that provide a unique benefit within the Philadelphia ecosystem for achieving impact.

These scores, combined with additional due diligence and research, inform the review teams decision on which organizations will receive an invitation to complete a Proposal, submit additional organizational documentation, and schedule an interview.

Proposal Guidelines

Organizations that advance in the process will:

- Schedule an interview that includes the executive director and two board members for the week of April 26 or May 3
- Submit additional organizational documentation
 - Determination letter from the IRS
 - Financial Statements from the previous three years (if able)
 - Statement of Activities (Profit and Loss)
 - Balance Sheet
 - Audit or Review Report by Independent CPA
 - Form 990
 - Financial Statements for current year
 - Year to Date Statement of Activities (Profit and Loss)
 - Balance Sheet
 - Staff and board list (with time spent in the organization and the overall racial and gender composition)
- Complete a proposal

Questions to Address in the Proposal	<ul style="list-style-type: none"> • Please describe the primary work, programs, campaigns, or services that your organization engages in. Who is your audience? What is or will be different as a result? • How does your organization differ from other organizations working on the same issue? What impact do the differences make? • What are your organizational plans or goals for the next three years? Please address plans for external impacts and internal operations. • What is your approach to evaluation? Please describe your process and what you have found. • SVP Philadelphia defines Capacity Building as developing core skills, leadership, culture, management practices, strategies, and systems to enhance an organization's effectiveness, sustainability, and ability to fulfill its mission. What are your capacity building wants and needs in the short and long term?
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	<ul style="list-style-type: none"> Please describe the ways that your board supports your organization's work and mission. What are its strengths? What gaps exist?
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We ask that proposals not exceed 2,700 words. There is no minimum word count, and we encourage you to be brief in responding to questions. If you would prefer to address the questions in a video recording, please upload your video to YouTube or Vimeo and provide a link. A submitted video should be no longer than ten minutes.

Proposal Selection Criteria

Our reviewers will score a package inclusive of the proposal, additional materials, and organizational interviews using the criteria from the letter of interest scoring in addition to the following to understand to what extent applicants:

- **Find their organization is at an inflection point and are ready to take their next step** – organization may be nearing a point like a leadership transition, expanding geographic focus, or scaling a program or campaign to increase impact.
- **Is sufficiently established to achieve impact** – finances are in order and form a strong base for supporting their mission and staffing.
- **Have the potential to benefit from SVP capacity building support** – organization's capacity building needs match capacity building areas of SVP.
- **Have stable and experienced leadership and Board of Directors** – organization has demonstrated continuity in board and key leadership positions.
- **Staff and board working in concert to advance mission** – relationships between staff and board are healthy and aligned in the same direction.
- **Have staff and board capacity to work with SVP** - will have time and focus to engage with SVP in capacity building work.

This will inform the selection of the organizations to receive our capacity building support and financial investment.