

**We are on a mission for a just Georgia.** Will you join us as a grantee partner? As a grantmaking partner, we believe grants for just systemic change begin with partnerships... and partnerships begin with connections. So, we welcome Letters of Connection (LOC) from current, potential, and former grantee partners. Before connecting, please see our website ([www.sapelofoundation.org](http://www.sapelofoundation.org)). It includes our "[Become a Grantee Partner](#)" page, where you can download our:

- **Strategic Direction Summary** – Learn how we work, review our eight grant criteria, and consider a partnership with us.
- **Letter of Connection (LOC)** – Submit this form if your work aligns with ours.
- **Letter of Connection (LOC) - Sample Form** – See this example before starting your LOC.
- **FAQs & Glossary** – Find helpful answers and definitions.
- **Planning Matrix** – Use some or all of this tool if it will help advance your work (available in PDF and Word).

## BIG PICTURE

**MISSION:** We strive for a just Georgia, through partnerships and solutions that increase environmental protection, social prosperity, and civic power.

**VISION:** All Georgians – especially marginalized communities, communities of color, and rural communities – live in healthy environments, have access to the resources they need to thrive, and engage in a just democracy.

### VALUES & PRACTICES:

- Catalyze just systemic change through power-building strategies of policy advocacy, civic engagement, and grassroots community organizing.
- Support marginalized communities – particularly communities of color – so they are included in and benefit from the creation and implementation of just policies and practices.
- Apply a statewide lens across Georgia's rural-urban continuum.
- Breakdown silos to unite interconnected agendas.
- Strengthen networks and collaborations.
- Strengthen capacity of our grantee partners.
- Leverage all of our capital to advance our mission.

**MISSION INVESTMENTS:** We are pursuing a mission investing journey to align 100% of our capital – grants (at least 5% of financial capital), endowment (95% of financial capital), human, partnership, advocacy, convening, etc. – with our mission.

### GRANTS:

- **Grant Portfolio I: Environmental Justice & Protection** – Open, two-phase process. **Priorities:** (1) water and (2) climate/energy.
- **Grant Portfolio II: Social Justice** – Open, two-phase process. **Priorities:** (1) voting rights and (2) criminal justice.
- **Grant Portfolio III: McIntosh County** – Closed, invitation-only process.
- **Grant Portfolio IV: Tools** – Processes vary, to advance the desired outcomes of Portfolios I-III.
  - **Tool I: Organization Development Fund** – Support internal, individual efforts of one organization or network.
  - **Tool II: Collaboration Development Fund** – Support external, collaborative efforts across organizations or networks.
  - **Tool III: Smith W. Bagley Advocacy Award** – Celebrate one organization or network, in memory of our late president.
  - **Tool IV: Musgrove Award** – Provide an inspiring and intimate space for retreats or gatherings on St. Simons Island.



**DETAILS: GRANT PORTFOLIOS I & II**

Timeline	Grant Portfolio I: Environmental Justice & Protection	Grant Portfolio II: Social Justice
<b>Grantmaking Phase I</b> – Letters of Connection Due:	August 15	February 15
<b>Board Meeting I</b> – Grant Application Invitations Issued:	Fall	Spring
<b>Grantmaking Phase II</b> – Grant Applications Due:	February 15	August 15
<b>Board Meeting II</b> – Grant Awards Issued:	Spring	Fall
<b>Assess, Evaluate, &amp; Learn</b> – Grant Reports Due:	February 1 of following year(s)	August 1 of following year(s)

**GRANT PORTFOLIO I – ENVIRONMENTAL JUSTICE & PROTECTION:**

- **Objectives** – Increase the number of Georgians who:
  1. Shape and benefit from environmental policies, practices, and systems that are just and effective.
  2. Prosper in safe, healthy, sustainable, and protected environments.
- **Desired Outcomes** – By utilizing strategies reflected in our values, practices, objectives, and grant criteria, we seek to contribute to just systemic change that results in the following:
  1. **Increased passage and implementation** of policies, practices, and systems that advance environmental justice and protection.
  2. **Stronger collaboration** among organizations, collaborations, and networks that pursue environmental justice and protection efforts.
  3. **Stronger capacity** of organizations, collaborations, and networks that pursue environmental justice and protection, as evidenced by: **(a)** Stronger policy advocacy, civic engagement, and grassroots community organizing work. **(b)** Stronger equity and justice lenses across their work. **(c)** Stronger organizational health, leadership, and membership.
  4. **More Georgians**, especially communities of color and rural communities: **(a)** Participate in policy advocacy, civic engagement, or grassroots community organizing for environmental justice and protection. **(b)** Prosper in safe, healthy, sustainable, and protected environments.

**GRANT PORTFOLIO II – SOCIAL JUSTICE:**

- **Objectives** – Increase the number of Georgians who:
  1. Shape and benefit from civic and social policies, practices, and systems that are just and effective.
  2. Prosper with full rights, protections, access, and agency in our democracy.
- **Desired Outcomes** – By utilizing strategies reflected in our values, practices, objectives, and grant criteria, we seek to contribute to just systemic change that results in the following:
  1. **Increased passage and implementation** of policies, practices, and systems that advance social justice.
  2. **Stronger collaboration** among organizations, collaborations, and networks that pursue social justice efforts.
  3. **Stronger capacity** of organizations, collaborations, and networks that pursue social justice, as evidenced by: **(a)** Stronger policy advocacy, civic engagement, and grassroots community organizing work. **(b)** Stronger equity and justice lenses across their work. **(c)** Stronger organizational health, leadership, and membership.
  4. **More Georgians**, especially communities of color and rural communities: **(a)** Participate in policy advocacy, civic engagement, or grassroots community organizing for social justice. **(b)** Prosper with fuller rights, protections, access, and agency in our democracy.



## STRATEGIC DIRECTION SUMMARY

### GRANT APPLICANTS:

- **Tax Status** – Must be 501(c)(3) tax-exempt nonprofit organizations in good standing with the IRS (or have fiscal sponsors).
- **Type** – May submit on behalf of one of three applicant types: organization, formal network, or less-formal collaboration.
- **Purpose** – May submit content about one of two purposes: general work or one project.
- **Lifecycle Stage** – May represent any institutional lifecycle stage: start-up, growth, maturity, or renewal.
- **Number** – May submit multiple times annually for either/both main grant portfolios, as needs and opportunities arise.
- **Not Confidential** – We may share content of some LOCs, applications, and/or reports with other leaders, foundations, etc.

### GRANT CRITERIA:

We prioritize the following criteria when awarding grants:

1. **Mission, Values, & Portfolio Alignment** – Support grantee partners that share our pursuit of environmental justice and protection and/or social justice.
2. **Promising Efforts** – Support grantee partners with promising efforts that demonstrate **(a)** important needs, opportunities, or threats for just systemic change; **(b)** goals that, if achieved, can advance solutions for just systemic change; **(c)** coherent and data-informed plans or methodologies; and **(d)** evidence or likelihood for success, with an evaluation process.

We use the remaining six criteria to assess the promise of an effort and determine if we are the right grantmaking partner:

3. **Primary Strategies** – Pursue **(a)** policy advocacy, **(b)** civic engagement, and/or **(c)** grassroots community organizing as the primary strategy. We prioritize promising efforts that include more than one of these power-building and complementary strategies for just systemic change.
4. **Marginalized Communities** – Ensure marginalized communities, particularly communities of color, are included in and benefit from the pursued just systemic change. We prioritize promising efforts that include and benefit more than one marginalized community.
5. **Place Focus** – Focus on **(a)** statewide efforts, with meaningful inclusion and perspectives of those living in more rural communities and smaller cities outside metro Atlanta, and/or **(b)** local or regional efforts based outside metro Atlanta. We use a statewide lens to consider just systemic change across all 159 counties on Georgia’s rural-urban continuum. Specifically: We use the United Way’s 13-county definition for metro Atlanta: Butts, Cherokee, Clayton, Cobb, Coweta, DeKalb, Douglas, Fayette, Fulton, Gwinnett, Henry, Paulding, and Rockdale. We support statewide efforts that work within those 13 counties, if grantee partners demonstrate that meaningful inclusion and benefits are not limited to communities within those 13 counties (note: option a for “place focus” criterion).
6. **Interconnected Agendas** – Breakdown silos in order to unite interconnected agendas for just systemic change across **(a)** strategies, **(b)** communities, **(c)** places, **(d)** issues, **(e)** sectors, and/or **(f)** movements. We prioritize promising efforts that include more than one interconnected agenda.
7. **Collaborative Approaches** – Engage in authentic and effective collaboration. We prioritize promising efforts for just systemic change driven by **(a)** formal networks, **(b)** less-formal collaborations of two or more organizations, and/or **(c)** anchor institutions that lead, convene, or support collaborative efforts. We tailor our support for each collaboration based on its structure, key partners, goals, and lifecycle stage (start-up, growth, maturity, or renewal). We particularly value partnerships between unlikely allies, who can generate greater power and new solutions together.
8. **Organization or Network Health** – Demonstrate strong **(a)** financial sustainability, **(b)** internal capacity, and **(c)** strategic acumen, all essential ingredients for advancing a mission for just systemic change.



### GRANT INELIGIBILITY:

We do not support the following:

- Brick-and-mortar building projects, including construction materials and labor costs
- Endowment funds
- Fraternal groups or civic clubs
- Individuals
- Medical research
- Museums, aquariums, or other large public facilities
- National or regional organizations, unless their efforts specifically benefit Georgia and funds are allocated to Georgia
- Organizations that are not tax-exempt
- Payment of debts
- Places of worship, unless their work is connected to broader efforts, communities, collaborations, or networks

### GRANTMAKING PHASE I – LETTER OF CONNECTION (LOC):

- **Process** – LOCs are the first of two phases in our grantmaking process. They help us start conversations. Based on our eight grant criteria, LOCs include three parts: **(a)** overview, **(b)** questionnaire, and **(c)** summary. We value each LOC shared with us, yet given our finite resources, we anticipate more eligible and promising LOCs than we can fund. Therefore, we review every LOC, contact some to learn more, and invite few to submit grant applications (phase two). Annually, one or more LOCs can be submitted for either grant portfolio, and the same LOC form applies to both of our main grant portfolios.
- **Grant Portfolio I: Environmental Justice & Protection** – LOCs due: August 15. **Priorities:** (1) water and (2) climate/energy.
- **Grant Portfolio II: Social Justice** – LOCs due: February 15. **Priorities:** (1) voting rights and (2) criminal justice.

### GRANTMAKING PHASE II – GRANT APPLICATION:

- **Process** – Grant applications are invitation-only and usually based on LOCs. Beyond what was shared in original LOC submissions, grant applications only request: **(a)** some additional information (e.g., budgets) and **(b)** final/updated LOCs that may include revised or expanded responses to key questions. During board meetings, our trustees vote on all grants. At least a month before a deadline, grant applications are available on our online portal. Given our longtime policy: Incomplete or late grant applications cannot be accepted, unless extensions were requested or offered at least three days before a deadline. Please see the “[Grantee Partners](#)” page of our website to access our online portal for grant applications and grant reports.
- **Grant Portfolio I: Environmental Justice & Protection** – Grant applications due: February 15.
- **Grant Portfolio II: Social Justice** – Grant applications due: August 15.

### GRANT REPORT:

- **Process** – Although we look forward to being in touch with grantee partners throughout each year, annual grant reports help our grantee partners and our foundation assess, evaluate, and learn together. Grant reports let grantee partners share outcomes, updates, and lessons learned about: **(a)** content from grant applications and **(b)** one or more of our four desired outcomes for a given grant portfolio. At least a month before a deadline, grant reports are made available to on our online portal. Given our longtime policy: Grantee partners that do not submit complete and on-time reports cannot be considered for future grants, unless extensions were requested or offered at least three days before a deadline.
- **Grant Portfolio I: Environmental Justice & Protection** – Grant reports due: February 1.
- **Grant Portfolio II: Social Justice** – Grant reports due: August 1.



## STRATEGIC DIRECTION SUMMARY

### GRANT DURATION:

- **Two-Year Grant Applications** – We ask most grant applicants to apply for two-year grants, because we believe just systemic change requires plans and capacity that extend beyond a year.
- **One-Year or Two-Year Grant Awards** – We may award one-year or two-year grants, depending on the alignment, promise, and timeline of grant applications; the overall grant application pool; and our budget limitations.

### GRANT PRIORITY AREAS:

- **Environmental Justice & Protection** - (1) Water & (2) Climate/Energy
- **Social Justice** - (1) Voting Rights & (2) Criminal Justice

### GRANT STRUCTURE/FOCUS:

- **Unrestricted General Operating Support** – Primary structure/focus.
- **Restricted Special Project Support** – Secondary structure/focus. Examples: first-time grant; grant with a budget that includes re-grants to other organizations; grant with a project aligned with our mission and a given grant portfolio, but that is not otherwise aligned; grant to an organization based outside Georgia, but focused on one project in Georgia; etc.

### GRANT AMOUNT:

- **No Minimum or Maximum** – We have not set a specific minimum or maximum grant amount. Most of our past grants ranged from \$20,000-\$50,000 per year.
- **No 100% Support** – We have not supported 100% of any project, effort, organization, etc.
- **No Budgetary Percentage Limit** – We have not set a specific percentage limit for any grant amount when compared to the budget of an organization or network. However, as we discuss organizational health and financial sustainability with each grantee partner, we remain mindful of this percentage, especially if it exceeds 10-15%.
- **Possible Matching Support** – We may consider matching grants, to help leverage resources from more funding sources.

### AUDIT & FINANCIAL REVIEW POLICY:

To help promote one form of organization or network health, we ask direct grantee partners (those that receive grant awards, not regrants) to complete an audit or financial review at least every three years, as well as meet state and national requirements to maintain 501(c)3 status.

- **Audit vs. Financial Review** – Grantee partners with operating budgets:
  - Over \$1 million should have audits.
  - Under \$1 million should have audits or financial reviews, at the discretion of their leadership.
- **Requirements** – Grantee partners either:
  - Have a completed, board-approved audit or financial review within the last three years.
  - Do not have a completed and board-approved audit or financial review within the last three years and have not received a grant from us since 2019. In this case, to be eligible for a second grant, an audit or financial review must be completed during the course of the first grant.
- **Financial Support** – Grantee partners are eligible for more funds to help offset costs of audits or financial reviews, if they either:
  - Pursue their first audit or financial review (regardless of budget size).
  - Seek additional support for their audit or financial review every three years (for budgets below \$250,000). Qualified grantee partners can apply to our Organizational Development Fund (ODF) to support audits or financial reviews. Our ODF can also be used for other purposes. Apply early in the year, as our annual budget for our ODF is limited.
- **Helpful Resources** – Georgia’s Charitable Solicitations Act, Charitable Organization Registration, National Council of Nonprofits’ “Nonprofit Audit Guide,” and National Council of Nonprofits’ “List of State Law Audit Requirements.”