



2022 LOI Committee Guide

Thank you for volunteering to serve on the LOI Committee for the 2023 cycle of the Cummings \$30 Million Grant Program. This committee is responsible for determining which letters of inquiry (LOI) will result in invitations to file full grant applications. We are grateful for the important contributions you will make in this critical step toward selecting the nonprofits to receive grants in June 2023.

This guide includes a great deal of information about the LOI review process. In addition, we are readily available to assist you if you have questions.

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About the Cummings \$30 Million Grant Program

This initiative awards a total of \$30 million every year to 150 nonprofits that are based in, and primarily serve, Middlesex, Essex, and Suffolk counties. Cummings Foundation, Inc. (CFI) and about 80 generous, insightful volunteers will first identify 150 organizations to receive three-year grants of \$30,000 - \$300,000 each. Among the winners will be first-time recipients as well as nonprofits that have previously received grants from Cummings Foundation. Then, 25 of this latter group of repeat recipients will be elevated to 10-year awards, ranging mostly from \$100,000 to \$1 million each. At the LOI stage, the Foundation asked that all requests be made with three-year awards in mind. Discussions about 10-year grants will take place at the end of the selection process.



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Timeline

Date	Activity
July 1 – Sept. 9	LOI submission window
Sept. 26 – Oct. 14	Individual LOI reviews by LOI Committee
Week of Oct. 17	Review partners meet to agree on final recommendations
Oct. 21	Final committee recommendations due to the Foundation
Nov. 1	Application invitations and decline notices emailed to applicants
Dec. 22	Applications due
June 15, 2023	Grant Winner Celebration

Our Approach to Nonprofits

They are the heroes: the nonprofit executive directors who also serve as HR managers, development officers, and marketing managers; the program staff who work diligently and passionately, often for low pay and even less recognition; the volunteers who devote precious free time in service to others. They are the heroes—not us.

We are privileged to be in a position to support their life-changing, equity-promoting, barrier-breaking, purpose-igniting work. We are not seeking to judge, eliminate, or vote out. Rather we endeavor to learn and discover synergies so Cummings Foundation can invest in organizations and efforts that match its values and priorities and that have the most meaningful, positive, and sustainable impact on local communities.

Foundation staff and volunteers possess valuable expertise gained through varied professional and personal experiences; however, we recognize and respect the intimate knowledge that nonprofit representatives have of the causes and the people to which they have dedicated their careers. The grant candidates are the true boots-on-the-ground experts, and they deserve not just a seat at the table, but the seat at the head.

We respect the beliefs of diverse populations and the uniqueness of individuals, and we believe that all people deserve to live with dignity and to have the opportunity to improve their circumstances. We recognize that we all have biases, but we strive to be aware of them, set them aside, and eliminate them from our thinking, questions, and comments. We welcome candid reminders from others when we demonstrate an unconscious bias.

*We are most grateful for the participation of our volunteers
and for the respect and kindness they show to all grant candidates.*



Our Guiding Principles

Having embarked on our collective journey of philanthropy, we pledge to work to help ensure that no one is ever left behind.

Recognizing that the dignity of every human person is fundamental, Cummings Foundation's primary goal is to help meet the most basic needs of all people in all segments of our society.

We seek to promote and empower the social and economic inclusion of all, irrespective of age, sex, disability, race, ethnicity, origin, religion, or other status.

We will work to improve the lives of those within our priority funding regions by directly supporting the work of other effective charitable organizations.

And we will endeavor through our local outreach to aid the furthest behind first.

—Bill and Joyce Cummings



This "color wheel" is a photo of the actual pin presented to Bill Cummings when he spoke at the United Nations in June 2019. Many of the words and sentiments here were inspired by portions of the United Nations' document "Transforming our world: the 2030 Agenda for Sustainable Development." Cummings Foundation, Inc. supports the [SDGs](#).

Review Process

Pre-screening

CFI has performed a cursory review of all LOIs to determine the following:

- Does the applicant meet the eligibility requirements?
- Does the request fall within CFI's priority funding areas (geography and cause)?
- If the nonprofit received a previous grant, did it fulfill all the grant agreement requirements?
- Has it been designated an Early Decision grant winner (see below for explanation)?

If a nonprofit has been designated an Early Decision winner or is easily determined to be ineligible for funding, CFI will manage that LOI's approval process rather than passing it on to the Committee. All other LOIs will be assigned to *two* committee members for evaluation.

Early Decision Grants

Up to half of the 150 grants each year are awarded to Early Decision winners, which are determined by Cummings Foundation through an internal process. Although not exhaustive, the following list includes some reasons nonprofits might be granted Early Decision status:

- Lease space in a Foundation-owned building
- Have a longstanding positive relationship with the Cummings organization
- Are previous grant winners that have been identified as outstanding performers
- Serve a cause or area that has been designated a priority for the current grant cycle
- Are selected by a CFI trustee or Cummings Properties Executive Committee member, each of whom is invited to recommend one nonprofit annually for a grant

The other grant winners will be selected completely by volunteers, without input from CFI.

Independent Evaluation

CFI will provide committee members with Google Sheets containing the names, locations, categories (e.g., healthcare, education), and brief applicant-generated summaries for each of their assigned LOIs. The spreadsheets will also have blank Status and Feedback columns, to be completed by the committee members.

Committee members may review their assigned LOIs at any time by logging into Foundant, our third-party online grants management system. See *Foundant Instructions* (page 8) for step-by-step instructions. After reviewing an LOI, please record a status decision and feedback in the spreadsheet. You may change these items at any time before completing your individual review.

Status

Please enter one of the following for each applicant:

- *Advance*: to recommend that it be invited to the full application stage
- *Decline*: to recommend that it be eliminated from further consideration
- *Alternate*: to recommend an invitation to the full application stage only if one or more applications designated “Advance” is removed from consideration, typically because it is discovered to be ineligible or because it has been designated as Early Decision. Please select three alternates, and indicate the order they should be considered (i.e., Alternate 1, Alternate 2, or Alternate 3).

Along with your spreadsheet of assigned LOIs, the Foundation will provide the number of LOIs to be advanced and declined, as well as the maximum number of Suffolk County nonprofits that may be advanced. This latter guideline is to ensure that none of the three counties is under- or over-represented. For example, because so many nonprofits are based in Boston, it would be easy award a majority of grants in Suffolk County. Despite not having any property in that county, Cummings Foundation includes Suffolk in its funding area because of the great needs there, as well as the great work being done there. We must be mindful, however, that it does not receive a disproportionate number of application invitations.

Please notify Andrew when you have completed your individual review, **which we request be done at least 48 hours prior to your scheduled meeting with your review partner**. He will then combine your spreadsheet with that of your review partner and return a merged spreadsheet to both of you. This document will go a long way toward streamlining your discussion and decision-making.

Feedback

Please provide a few informal sentences or phrases that describe the thinking behind your decision. Because these comments will always be printed on a spreadsheet with the nonprofit’s name and city as well as the one-sentence summary provided in the LOI, it is not necessary to repeat any of this descriptive information in your comments.



This column is extremely important, as this is where CFI staff members look when nonprofits call seeking feedback. Because *you* are making the funding decision, CFI is relying on you to provide the insights behind these decisions. Although many foundations do not provide such feedback, we are dedicated to showing respect for the time and effort nonprofits invest in these applications and to helping them be more successful in their future grant-seeking efforts.

Joint Decision-Making

You and your review partner will be assigned the same LOIs. Please arrange to meet the week of **October 17** with your review partner at a time and place of mutual convenience to discuss your assigned applicants and decide which ones will advance in the process. If you would like to meet at Cummings Foundation's headquarters in Woburn, please contact us, and we will be delighted to reserve a conference room for your use.

A comparison of the two members' recommendations will quickly show where there is already consensus about applications that should advance (those for which *both* members assigned the status of Advance) as well as those that should be declined (those for which *both* members assigned the status of Decline). Members are encouraged to then discuss the applications that received different status assignments and share their individual perspectives.

The goal is to use discussion, and perhaps a bit of negotiation, to agree upon a final list of status assignments. During the meeting, please complete the final decision columns on the joint spreadsheet.

Recommending an Alternative Installment Schedule

Although the LOI asks for applicants' preferred annual installments, ranging from \$10,000 to \$100,000, for the three-year grant, the actual disbursements are determined by CFI. In addition, CFI does not want to be responsible for a disproportionate share of a nonprofit's total revenue. **If you feel that a different disbursement amount than the one requested would be more appropriate for a proposal, please make a note in the Feedback column.**

Requesting Additional Information

Committee members may contact applicants directly if they have questions about an LOI. (In Foundant, click on the Contact Info tab at the top of the request summary page to view the primary contact for the applicant.) If a committee member prefers that CFI perform this outreach, please contact Andrew, and he will be pleased to make the inquiry and then add the response into the Comments field within Foundant.

Returning Grantees

Volunteers reviewing LOIs from previous grantee recipients should also review their brief site visit reports, which provide important information from Foundation volunteers who visited with the organization.

Funding Priorities

Geography

- Applicants should not only be headquartered in Middlesex, Essex, or Suffolk county but also provide *at least 50 percent* of their overall services in this tri-county area. Nonprofits that meet eligibility criteria and provide some services statewide, or even in adjacent states, are eligible for consideration. Given the strong local nature of this funding program, however, local office/affiliates of regional or national organizations will not be considered, even if they meet the 50 percent threshold, *unless* they have their own EIN.
- Special consideration is given to nonprofits that are based in or serve the 11 cities and towns where the Cummings organization operates commercial real estate: Andover, Beverly,

Burlington, Marlborough, Medford, Somerville, Stoneham, Sudbury, Wakefield, Wilmington, and Woburn.

Cause

- The Cummings \$30 Million Grant Program funds a wide variety of causes, including human services, education, healthcare, and social justice.
- Causes that are *not* among this program’s priorities are athletics, arts and culture (including dance, music, and theater), the environment, and animal welfare. CFI will, however, consider requests from organizations that engage in these areas toward a goal that fits within our priorities (e.g., a program that uses theater to teach the dangers of substance abuse, a nonprofit that trains service dogs for veterans with disabilities).
- To ensure that funds benefit a wide variety of causes, the Foundation limits the number of grants awarded each year to independent organizations affiliated with the same national organization (e.g., Boys & Girls Clubs, YMCAs).

Organization Size

- The Cummings \$30 Million Grant Program primarily supports small and medium-sized nonprofits that do not enjoy the stable donor bases and endowments that generously support so many larger institutions in the Boston area (e.g., major hospitals and universities).
- The Foundation wants grants to go where they will make a meaningful difference—not where they will be drops in buckets.

Eligibility

The Cummings \$30 Million Grant Program will *not* generally consider requests for:

- Endowments
- Medical research
- Religious endeavors
- Relatively new entities
- Political, legislative, or lobbying organizations
- Individuals or debt reduction, no matter how worthy
- Organizations that do not regularly file IRS Form 990
- Major capital campaigns, unless very near completion
- Organizations that are classified as a private foundation
- Primary and secondary schools that charge significant tuition
- Very large organizations already supported by robust endowments
- Organizations that do not have tax-exempt status under Section 501(c)(3) of the U.S. Internal Revenue Service Code
- National or regional organizations, or local branches thereof that do not have an EIN separate from that of the larger entity
- Organizations that discriminate based on race, color, gender, religion, sexual orientation, national origin, age, disability, etc.
- Municipalities (with the exception of public schools), except for the 11 communities in which the Cummings organization operates [commercial properties](#)

Selection Criteria

Given the great diversity among grant recipients, we do not have a standard scoring rubric to aid in decision making. Instead, we ask committee members to rely on the key principles below, plus their own valuable experience and good judgment, to determine which applicants should advance in the process.

Impact

Cummings Foundation seeks funding opportunities that will have a meaningful impact on a nonprofit and the people it serves. “Meaningful impact,” however, can take many forms. For example, one program might affect the lives of hundreds of children by providing educational materials, whereas another program might provide one-on-one mentoring that affects only a few dozen children, but changes the course of their educational paths. Although different in scope, both programs might be worthy of grant funding.

History of Success

Cummings Foundation applauds the initiative of newly formed nonprofits that seek to meet community needs. Given the large size of most grants made through the Cummings \$30 Million Grant Program, however, the Foundation gives priority to *established* nonprofits with a *proven history* of providing value to the community. Grants may be awarded to fund new programs of established nonprofits if the application successfully demonstrates the need for the program and the organization’s capacity to fill that need.

Population Served

Cummings Foundation gives priority to nonprofits that serve people who have been disadvantaged or marginalized in some way. We greatly appreciate effective programs that work to prevent or counteract discrimination due to race, religion, sexual orientation, gender identity, citizenship status, age, physical disability, etc.

Other Considerations

Fiscal Sponsorship

Fiscal sponsorship is when a nonprofit organization extends its tax-exempt status to another group. The fiscal sponsor accepts tax deductible donations on behalf of the sponsored project/organization, and accepts responsibility for the use of those funds, ensuring their application toward the intended charitable purposes. Although CFI will consider requests from organizations that have fiscal sponsors, it is more likely to fund organizations that have their own 501(c)(3) statuses because of the transparency and IRS oversight that accompanies that designation.

Grant-makers

CFI changed its eligibility requirements a few years ago to allow requests from grant-makers, which are organizations that, rather than providing services or programs, raise funds to grant them to other organizations or to individuals. Grant-makers should demonstrate that they have systems and expertise in place to ensure due diligence when vetting funding requests.

Foundant Instructions

For data privacy and to protect the information of applicants/grantees, the Foundation does not make its grants management system user guide publicly available. Volunteers on grant selection and site visits committees are provided with access to applicant/grantee materials (e.g., letters of inquiry, applications, impact reports, site visit reports, contact records) to be well informed and adequately carry out relevant activities while representing Cummings Foundation.

Sample Feedback

- Website demonstrates effective materials and background to accomplish stated goal. I appreciate the effort to increase their services to students with special needs. They appear to have a good track record of success and a plan for making their work self-sustainable
- Impactful program filling a critical need. The need will only increase going forward.
- Extremely well written case statement with specific goals and strong impact on the lives of their students. While perhaps not affecting the large numbers of people as other proposals, it will make a huge difference in the lives of students they help.
- Relatively small but comprehensive program offering essential support to life's most struggling populations. They seem to do a lot with a large volunteer and small paid staff who are dedicated to their important mission.
- Provide valuable service. Very heavily volunteer oriented. Grant would have a meaningful impact on the organization.
- Not life & death but SUPER Teen program provides an important service at a critical time in the lives of those it serves. Very targeted use of the grant money.
- The requested amount is almost half of their budget and does not appear to be particularly innovative or targeted toward a Cummings geographic priority area. There is not convincing information on how this playground will enhance science and arts learning (although not a necessary goal). The proposal does not seem overly compelling.
- A good program but the situation of the population served is not as dire as some with some other social justice programs.
- This LOI is quite confusing and not clear about what they hope to accomplish. The language is difficult to understand, and looking at their web site did not clarify either. I wonder how effective it can be if they are not able to communicate clearly their goals and method of operation.