

## **State Equality Fund Announcement and 2009 Open Invitation for Letters of Intent**

The Gill Foundation, Evelyn and Walter Haas Jr. Fund, and an anonymous donor, in conjunction with Tides Foundation, are pleased to announce the third year of the State Equality Fund. This is an open announcement and invitation. The State Equality Fund operates as a donor advised fund of Tides Foundation and it is the grant making entity. However, the Fund is programmatically staffed on behalf of the donors by the Gill Foundation's Movement Building Center. By virtue of this arrangement, almost all of the State Equality Fund assets--\$1.7 million for 2009--will be re-granted.

The goal of the fund is to further equal opportunity for people at state and local levels regardless of sexual orientation or gender identity and expression. It is an outcome-based fund, with an emphasis on one to three year plans to achieve elements of equality in the form of policy change, and to a lesser extent, initial implementation or impactful enforcement of policy change. While working in conjunction with other funding collaboratives, the goals of the State Equality Fund are distinct from both the Civil Marriage Collaborative, with its focus on near-term marriage equality, and the National Collaborative, with its focus on a few targeted states. In order to effectively complement the work of the other collaboratives, the State Equality Fund supports issues and locales not already receiving significant levels of funding. For organizations that are engaged in state or local LGBT advocacy work and that are not already grantees of the Civil Marriage Collaborative or the National Collaborative, the State Equality Fund is the only avenue in 2009 for directly or indirectly accessing Gill Foundation funds. More information on guidelines, priorities, and outcomes is attached.

### 2009 Cycle 2 Timeline

The State Equality Fund is proceeding with two grant cycles in 2009. *This is a change from previous years of the fund.* Full proposals to the State Equality Fund are received by invitation only, but invitations are extended based on an open Letter of Intent (LOI) process. Cycle 1 is underway; the timeline for Cycle 2 is as follows:

**May 29, 2009:** LOIs due to Gill Foundation

**Late June 2009:** Invitations for full proposals are issued

**August 3, 2009:** Full proposals due to Gill Foundation

**Mid-August to Mid-October 2009:** Site visits and follow-up as necessary

**Late December 2009:** Award Letters and grants issued by Tides Foundation

## Letter of Intent

Electronic copies of LOIs are due to the Gill Foundation by May 29, 2009 for Cycle 2. No hard copies will be accepted without a prior arrangement. Please e-mail files to Dave Montez, program officer at [davem@gillfoundation.org](mailto:davem@gillfoundation.org); **include the name of your organization in the subject line of the e-mail**. Please address the following in your LOI: (use outline headings and limit the entire letter to 1,000 words)

- 1) Basic Information (does not count toward 1,000 word limit)
  - a) Operating name of organization:
  - b) Name of organization as printed on IRS 501(c)(3) Determination Letter (if different):
  - c) Name, telephone, and e-mail address of Executive Director:
  - d) Name, title, telephone, and e-mail address of contact person (if different):
  - e) Mailing address, fax number, and physical address (if different):
  - f) Website:
- 2) Organizational background
- 3) The outcome (required) and benchmarks (if applicable) for which funding is sought. Please see the Requirements of Measurable Outcomes section below and be sure to follow the single sentence rule for outcomes stating what is to change, the numerical degree of change (if other than policy change) and the date for achievement.
- 4) Total cost of effort and amount sought from the State Equality Fund for each year. The State Equality Fund may offer multi-year funding. If you are seeking multi-year funding, please also explain how your plan will change if only a single year of funding is awarded.
- 5) Plans, activities, or strategies for achieving the outcome. Please highlight collaboration and coordination with other agencies, community support, and how the plan effectively includes people of color.
- 6) If you are currently receiving a multi-year grant from the State Equality Fund, you may apply for more funding to achieve other outcomes. However, please demonstrate that your organization will have the requisite level of staffing and other resources necessary to complete the proposed scope of work.

**Do not mention** specific electoral or candidate work in any submission to the State Equality Fund. Based on the LOIs, invitations for full proposals will be extended in late June 2009.

## Additional Information

Tides Foundation is the legal grant making entity for the State Equality Fund; however, it is staffed by Gill Foundation employees. Therefore, all questions at all stages of the proposal, grant, and reporting processes should be directed initially to the Gill Foundation and not Tides Foundation. Please contact Dave Montez, program officer ([davem@gillfoundation.org](mailto:davem@gillfoundation.org)) with questions before submitting your LOI.

## State Equality Fund 2009 Guidelines

### Requirement of Measurable Outcomes

The State Equality Fund is outcome based, meaning we are looking for tangible, quantifiable achievements within 3 years. **Outcomes** are defined as measurable benefits for people during and after a particular project; they are the measurable achievement all work is made to accomplish. More detailed definitions with general guidance on outcomes and other terminology are at the end of this packet. To be considered for the State Equality Fund, an outcome should meet the following requirements **and be stated in a single sentence**:

- 1) Be a single outcome or a related sequence of outcomes focused on one of the funding areas listed below. Multiple unrelated outcomes are discouraged.
- 2) Be an element of LGBT equality in the form of policy or systems change, the initial implementation or the impactful enforcement of a policy change in the areas listed below.
- 3) State the method of measuring success (if other than policy enactment) and state the numerical degree of success expected.
- 4) State a date for achievement within three years. If the long-term outcome extends beyond three years, then in a separate sentence please also include a short-term outcome that will be achieved within three years.
- 5) If the earliest outcome is not achievable in the grant year commencing in December 2009, please state benchmarks that will be achieved in each year of the project, including the first, until the long-term outcome is achieved. (see definition sheet for benchmarks)

### Funding Areas

The goal of the State Equality Fund is to promote lesbian, gay, bisexual, and transgender (LGBT) equality. However, no grant dollars can be used for lobbying, voter registration, electoral or candidate work. The fund will support outcomes at the state or local level in the following areas:

- 1) Nondiscrimination in employment, housing, commerce, treatment and provision of services regardless of sexual orientation or gender identity or expression.
- 2) Same-sex relationship recognition, including domestic partner benefits, civil unions, and other forms of relationship recognition. Due to the participating funders' involvement in the Civil Marriage Collaborative, efforts to achieve marriage equality in the near-term (1-3 years) are ineligible for the State Equality Fund.
- 3) Parenting rights for existing and potential LGBT parents, including adoption rights, second parent adoption, and foster parenting.
- 4) Safe schools for LGBT students, including protection for students from anti-LGBT bullying and harassment.

- 5) Violence prevention and reduction including, but not limited to, domestic violence and hate crimes.
- 6) Addressing and reducing the barriers to LGBT equality that exist among certain constituencies, such as people of color.
- 7) Securing public funding for LGBT services.
- 8) While the State Equality Fund is focused on advancing LGBT equality, it will also consider funding the prevention of negative policies or systems changes in the areas listed above.

### Funding Priorities

Among proposals that are eligible for funding, the State Equality Fund will give priority to the following:

- 1) Efforts and/or organizations that are not significantly funded by the Civil Marriage Collaborative or the National Collaborative.
- 2) State-based or local organizations with ongoing LGBT equality efforts.
- 3) Proposals that demonstrate meaningful collaboration with relevant organizations, including non-LGBT allies, and all other LGBT advocacy efforts in the state or locale. Joint proposals are welcomed and encouraged. We expect organizations to work with and build progressive coalitions and we encourage joint proposals with progressive organizations.
- 4) State efforts that have the greatest impact on the most number of people, especially those efforts that have regional or national significance.
- 5) Efforts and projects that will leave the grantees with greater capacity to achieve further LGBT equality gains in the future.
- 6) Efforts that show strong community buy-in, financial support, and long-term sustainability.
- 7) Well developed plans that are achievable and feasible.
- 8) Efforts that effectively engage and include people of color and address racial disparities.

### Funding Exclusions

- 1) The following are ineligible for funding under these guidelines: endowments, capital projects, pride events, arts and cultural programming, individuals, scholarships, debt relief, debt retirement, video production/distribution and LGBT services.
- 2) No grant dollars can be used for lobbying, voter registration, electoral or candidate work.
- 3) Funding is limited to organizations providing programming within the United States or its recognized territories.

## Additional Considerations and Information

- 1) Funding is limited to organizations with a current 501(c)(3) determination letter or advance ruling. Projects fiscally sponsored by a community foundation with a 501(c)(3) determination letter or advance ruling are also eligible.
- 2) Organizations may submit proposals by invitation only. Invitations for proposals are based on Letters of Intent submitted during a designated open cycle. Unsolicited proposals will not be accepted. This is a competitive process. As such, an invitation to submit a full proposal is not a guarantee of funding. Funding in any year or cycle does not imply or guarantee future funding.
- 3) Guidelines and instructions for full proposals will be sent with invitations for proposals.
- 4) The Gill Foundation or Tides Foundation will initiate all contact asking for clarification, additional information, or a meeting, as needed.
- 5) Barring extenuating circumstances, yearly awards will not exceed 15 percent of an organization's budget; 50 percent of a project budget or \$50,000 – which ever figure is less.
- 6) Multi-year grants up to three years may be awarded, but it will depend on the resources of the State Equality Fund and the quality of proposals.
- 7) Organizations must have a board-approved nondiscrimination policy inclusive of sexual orientation and gender expression in effect. That policy will be requested with the full proposal.
- 8) There is no guarantee that the State Equality Fund will continue into future years.

## Definitions

There are several acceptable ways to model your outcome plan. If you currently use an model with different terminology than the five stages listed below, we do not expect you to change. We provide these definitions to help you identify true outcomes within whatever model you employ. *Additionally, we do not require you to identify all five stages in your proposal; we only require outcome, benchmarks if applicable, and the plans or strategies necessary to reach your outcome.*

**Inputs** are the resources you will use during a project to achieve your outcome. They include things like grant money, staff and staff time, facilities, equipment, existing research, and base poll results.

**Activities** are the strategies, programs, and plans that an organization employs to achieve a specific outcome. Organizations use inputs during activities. For models that have a “process” step, strategies and activities are two-thirds of this step. In the advocacy arena, examples of activities include public education campaigns, research for messaging purposes, issue polling, trainings, town hall meetings, signature drives, and letter writing campaigns.

**Outputs** are the end product of activities and should not be confused with outcomes, which are the ultimate desired effect. Some models refer to outputs as “milestones” while others lump activities with outputs and call them “objectives.” For models that have a “process” step, outputs are the final one-third of this step. Examples of advocacy outputs include the number of people contacted, talking points, baseline poll results, trained volunteers, signatures gathered or letters written, reports, and curriculum.

**Benchmarks** are not always included in models. They are appropriate only when the ultimate desired outcomes are not achievable in the short term. Benchmarks are measurable progress indicators that are just beyond the direct control of the program. They are the results of outputs and often a necessary step toward an ultimate outcome. Examples of benchmarks within advocacy include committee hearings, improved poll results, expressions of support, or policy advancement short of passage. An increased individual fundraising base or additional institutional support for the proposed project is also an acceptable benchmark. As with an outcome, a benchmark should be stated with a measurement and time frame.

**Outcomes** are measurable benefits for people during and after a particular project. Outcomes should state what change is occurring, how the change will be measured (if other than a single policy change), and a deadline for when the change is expected. There can be a single outcome or outcomes can be staged from short to long term based on time, degree of control and degree of impact. Goals can be considered outcomes as long as they are quantifiable, measurable, and beneficial to the desired constituency. Examples of outcomes include the enactment of legislation, corporate policy change, executive orders, and court rulings, all by a certain date. An example of an outcome in the area of implementation or enforcement is “a 20 percent reduction in X as measured by Y within one year.”

*A bibliography of other sources for outcome model information is available by request. Please contact Dave Montez at [davem@gillfoundation.org](mailto:davem@gillfoundation.org).*