

**TD Charitable
Foundation
Capacity
Building Fund**



Charitable Foundation



About the TD Charitable Foundation & Capacity Building Fund

Founded in 2002, the TD Charitable Foundation endeavors to be a responsible corporate citizen through its mission to support, respect and improve the quality of life in the diverse communities we serve. We primarily fund programs aligned to one or more of the four drivers of our corporate citizenship platform, the [TD Ready Commitment](#), with special consideration given to those that benefit historically underserved communities and low-to-moderate income people.

The Capacity Building Fund includes two opportunities:

- **Capacity Building Grants** provide funding to help strengthen and increase the impact of organizations on the communities they serve. These grants support work around three key issues: tactics, talent and tools.
- **The Nonprofit Training Resource Fund** is also available for organizations to request funding toward specific trainings that increase their employees' capacities and skill sets.

Before you apply, please read the eligibility, FAQs and application checklists in both the **Capacity Building Grant** and **Nonprofit Resource Training Grant** sections below and contact us with any questions at us-charitablegiving@td.com.



Capacity Building Grant Eligibility

We support initiatives that:

- Are tax-exempt under IRS Code 501(c)(3) or supported by a public school or other qualified state or local governmental entity that isn't classified as a private foundation
- Comply with the [TD Charitable Foundation's anti-discrimination policy](#)
- Are located in a TD Bank, N.A. metro market area

We have a preference for projects and organizations that:

- Align to one or more of the TD Ready Commitment drivers
- Align to one of the following focus areas:
 - Tactics—investments in strategy that can include program design or implementation, creation or expansion of a strategic plan, or succession planning
 - Talent—investments in people that can include hiring new staff, professional development or skill development for existing staff or leadership development for board members.
 - Tools—investments in infrastructure that can include technology improvements, program evaluation tools, program supplies/materials, or other capital purchases
- Have annual operating budgets of \$2 million or less
- Have not received more than \$200,000 from TD Bank and/or TD Charitable Foundation in the last twelve months
- Have measurable goals and outcomes
- Add value to the scope of services offered by an organization
- Support low- to moderate-income people and communities
- Support diverse and/or historically underserved communities



We do not support:

- Individuals
- Private foundations
- Political candidates, lobbying or advocacy organizations
- Religious organizations
- Research organizations or projects
- Organizations with a limited constituency, such as athletic teams or social, fraternal or labor groups
- Organizations or events that are not open to members of the general public
- Organizations that discriminate on the basis of race, national or ethnic origin, color, religion, age, sex, sexual orientation, gender identity or expression, marital status, family status, veteran status, disability or other characteristics protected by law
- Programs serving residents of communities outside our geographic footprint
- Fundraising events (e.g., golf tournaments, school events)
- Annual appeals
- Funds to pay down operating deficits
- Endowment funds
- Travel, trips, tours or conference expenses for groups, individuals or organization employees
- Grant amounts less than \$25,000



Capacity Building Grant Application FAQ

How do I apply?

You must apply [online](#).

What is the grant amount for Capacity Building Grant funding?

The range for Capacity Building grants is \$25,000-\$150,000. You may apply for full or partial funding of a program.

Is there an application deadline?

We accept capacity building grants twice a year, following the funding calendar, which can be found on the [Capacity Building Fund page](#).

When do you notify applicants?

Applicants are notified according to the funding calendar, which can be found under the “How to apply” section on the [Capacity Building Fund page](#).

Is there someone I can contact if I have a programmatic question?

Yes. You can contact us via the relevant e-mail address below:

- New England: newenglandcharitablegiving@td.com
- New York, Southern CT and Northern New Jersey—Bergen/Passaic counties: newyorkcharitablegiving@td.com
- Pennsylvania and Central, Southern and Coastal New Jersey: panjcharitablegiving@td.com
- Delaware, Virginia, Maryland, Washington, D.C., North Carolina and South Carolina: midsouthcharitablegiving@td.com
- Florida: floridacharitablegiving@td.com

Who will review my grant application and make the final funding decision?

All applications will be reviewed at the local level, with final review and approval by the TD Charitable Foundation’s Board of Directors.



If my organization receives a Capacity Building Grant, is my organization eligible for other funding from TD Charitable Foundation and/or TD Bank?

Organizations that receive a Capacity Building Grant are unable to reapply for a Capacity Building Grant for two years. However, you may be eligible for other funding, including from the TD Charitable Foundation or the Nonprofit Training Resource Fund. [Click here](#) to see information for other funding opportunities.

My organization's annual revenue exceeds \$2 million. Am I eligible to apply?

No. The Capacity Building Fund is limited to organizations with annual revenue of \$2 million or less.

I do not know or prefer not to answer if my organization considers itself one or more of the following: Black-led, Latinx-led, Asian-led, Women-led, LGBTQ2+-led, Veteran-led, Persons with Disability-led, Native American-led. Am I eligible to apply?

Yes. You are eligible to apply and can choose the "Prefer not to answer/I do not know" option. Choosing this will not count against your organization in the review process.

Does the TD Charitable Foundation have an anti-discrimination policy?

Yes. Building an inclusive organization is a key element of the TD Charitable Foundation's giving strategy. We are working to create and sustain a diverse and inclusive workplace that reflects the communities we serve. Our commitment to diversity includes how we contribute to our communities. Projects, programs and activities funded by the TD Charitable Foundation must be consistent with this commitment.

Preparing to Apply for the Capacity Building Grant

You will need to answer questions about the following to complete the application:

- General organization and contact information—such as name, address, mission statement, etc.
- Request details—such as request amount, project title, communities served, outcome measurement, confirmed partners, etc.
- Financial information—such as organization budget, project budget, explanation of any significant changes in revenue, expenses, etc.
- Acceptance of grant conditions, should your organization be chosen for funding

In addition to the application questions, the following documents are required (in PDF or Word format) for your funding request to be considered.

- A list of your organization's board members including their employer, job title, and board position
- Last available audited financial statement or a copy of filed tax form, if the organization does not have an audit performed. Acceptable financial documents include:
 - A full financial audit
 - Completed tax return
 - 990EZ return—we will not accept the 990N or Postcard
- A copy of the 501(c)(3) federal tax exemption letter of determination and, if applicable, evidence of your organization's authority to operate under the 501(c)(3) of another organization. Alternatively, a letter on official letterhead (signed by the senior officer) providing the nine-digit tax identification number of the applying government entity or public school
- Your organization's current operating budget
- A budget for your proposed project



Nonprofit Resource Training Grant Eligibility

We support organizations that:

- Are tax-exempt under IRS Code 501(c)(3) or supported by a public school or other qualified state or local governmental entity that isn't classified as a private foundation
- Are located in a TD Bank, N.A. market area
- Comply with the [TD Charitable Foundation's anti-discrimination policy](#)
- Serve low- to moderate-income communities and/or people
- Support diverse and/or historically underserved communities

We support standalone and certification training programs that:

- Are pertinent to one or more employees' or board members' roles
- Have not been completed at the time of application
- Begin at least 30 days from application submission



Nonprofit Resource Training Grant Application FAQ

How do I apply?

You must apply [online](#).

How much is the sponsorship?

The maximum amount is \$1,000.

How many times may I apply for a grant?

Your organization may apply as many times as you'd like throughout the year, but only one grant will be awarded to an organization per our fiscal year, November 1–October 31.

Is there an application deadline?

No. We accept applications on a rolling basis and review them monthly.

When do you notify applicants?

Applicants are notified 2–6 weeks from submission. Notification and payout are usually made in the fourth week of each month.

May I discuss my submission in person?

Unfortunately, due to the high volume of requests, individual meetings are not possible.

Does the TD Charitable Foundation have an anti-discrimination policy?

Building an inclusive organization is a key element of the TD Charitable Foundation's giving strategy. We are working to create and sustain a diverse and inclusive workplace that reflects the communities we serve. Our commitment to diversity includes how we contribute to our communities. Projects, programs and activities funded by the TD Charitable Foundation must be consistent with this commitment.



Nonprofit Resource Training Grant Application Checklist

For your funding request to be considered, you must attach the following required documents to the online Nonprofit Training Resource Fund donation application:

- A letter from an executive of your organization approving enrollment of specific employee(s) in this class/course
- A detailed class/course description (one page maximum), including:
 - The class/course title and objectives
 - The dates and duration of the class/course
 - The class/course location
 - The tuition rates
 - The name of the organization providing the class/course
 - The number of individuals from your organization who will be attending the class/course
- A list of your organization's board members including their employer, job title, and board position
- Last available audited financial statement or a copy of filed tax form, if the organization does not have an audit performed. Acceptable financial documents include:
 - A full financial audit
 - Completed tax return
 - 990EZ return—we will not accept the 990N or Postcard
- A copy of the 501(c)(3) federal tax exemption letter of determination and, if applicable, evidence of your organization's authority to operate under the 501(c)(3) of another organization. Alternatively, a letter on official letterhead (signed by the senior officer) providing the nine-digit tax identification number of the applying government entity or public school.
- (If applicable) A certificate of completion or other evidence of attendance to the most recent training previously funded or partially funded by the TD Charitable Foundation Nonprofit Training Resource Fund donation program



Technical FAQ

When I try to open the application, I receive an error message stating, “My browser is not configured to accept cookies.” Why?

If you receive this error message, please contact a member of your organization’s technology staff. You may need to adjust your computer’s settings in order to access the application.

Can I copy and paste information from a Word document into one of the grant application’s text boxes?

Yes. You can copy information from an existing Word document and paste it into the application.

I don’t have all of the required documents in a digital format. How can I submit them?

Please contact the TD Charitable Foundation staff at us-charitablegiving@td.com. You will be contacted with instructions on how to forward these documents to us. Grant requests will not be considered via this email link.

How will I know that my grant request has been received?

After your application is complete, you will receive an email confirmation for your new application. Please add the following email address to your list of approved senders to ensure that future communication is received from the TD Charitable Foundation: do-not-reply@tdreadycommitment.td.com.



Impact Report FAQ for Grant Recipients

The TD Ready Commitment's goals for an inclusive and sustainable tomorrow come to life using four interconnected drivers of change. Within these four drivers are 10 outcome-driven focus areas where TD targets its efforts to positively impact our colleagues, customers and community.

To determine our progress toward our goals, we collect standardized data from our community partners regarding the social and environmental impact of our philanthropic community investments. Community partners will receive direct guidance on reporting timelines and instructions on accessing the report via email.

My organization received funding from TD. How do I complete our impact report?

If you are required to submit an impact report, a notification will automatically be sent to your organization within 9 months of your grant date. You'll receive this notification via email to whichever person you indicated as the primary contact in your initial application. The email invitation will provide a link to log into TD's grant portal—the TD Ready Commitment Network—where you can complete the report.

If you haven't set up a login for TD's grant portal, you'll receive a prompt to create a password for that portal in a separate email. If the person who was listed as the primary contact on your application is no longer with your organization or is unavailable to complete the report this year, please update this information in the TD Ready Commitment Network. If you're unable to access the TD Ready Commitment Network, please email us at us-charitablegiving@td.com.

What is the reporting period for this impact report?

The email you receive will specify your organization's grant date, and this will be the starting point to report all activities that took place from the grant date and for the 9 months following.

For example: If your grant date says November 2022, please report on all activities completed from November 2022 through August 2023.



What should I include in the impact report?

You should include information on activities supported by TD funding for the 9 months following your grant date. Please do not include data on any activities that took place outside of this timeframe.

Is there a deadline for completing the impact report?

Yes. The notification email will have the due date for the impact report in the subject line. The due date will also be available in the TD Ready Commitment Network.

If you'll be unable to meet this deadline, please contact your Senior Regional Giving Manager to notify them. Please note that if you do not complete an impact report for your activities (without extenuating circumstances—see below), it may affect decisions on future grant applications from your organization.

We received more than one grant from TD this year. Should we include all our impact data in one report?

No. If you received funding from TD for separate initiatives this year, you should receive separate impact reports to complete. They'll be delivered to the email address of the primary contact listed on the application. So, if you listed the same person for multiple initiatives, they'll receive multiple invitations to complete an impact report. You'll be able to discern which report is for which initiative based on the 'project title' and the related request information on the invitation emails and TD's granting portal.

If our program is ongoing and we have not exhausted our TD funding, do we still need to submit a report?

Yes. Please report on activity completed during the 9-month period following your grant date, regardless of if there are still TD funds to exhaust for this program. Please note within your impact report narrative if there are leftover funds and a timeline for use of these funds.



We received a notice to complete an impact report for funding we received this year, but our activities haven't started yet, so we have nothing to report. What should we do?

Please send a message to the appropriate email address below and notify TD of your situation. Your report will be marked 'no activities to report' for this year, and you'll be issued a report to complete next year for these activities. Under these circumstances you will not be penalized in any way for not completing this year's report.

- New England: newenglandcharitablegiving@td.com
- New York, Southern CT and Northern New Jersey—Bergen/Passaic counties: newyorkcharitablegiving@td.com
- Pennsylvania and Central, Southern and Coastal New Jersey: panjcharitablegiving@td.com
- Delaware, Virginia, Maryland, Washington, D.C., North Carolina and South Carolina: midsouthcharitablegiving@td.com
- Florida: floridacharitablegiving@td.com