

# Regional Grants



**Charitable Foundation**



## About our program

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The TD Charitable Foundation, founded in 2002, endeavors to be a responsible corporate citizen in the communities where we live and do business. We primarily fund programs aligned to one or more of the four drivers of our corporate citizenship platform, the [TD Ready Commitment](#). Special consideration will be given to organizations that share TD's value of inclusion by delivering programs that support diverse and/or historically underserved communities and to programs that support low-to moderate-income individuals with services that improve the quality of life.

Before you apply, read this guide and contact us with any questions at [US-CharitableGiving@TD.com](mailto:US-CharitableGiving@TD.com).

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### Eligibility

#### **We support initiatives that:**

- ✓ Are tax-exempt under IRS Code 501(c)(3), a public school or other qualified state or local governmental entity and not 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 support projects that:**

- ✓ Are programmatic in nature and focus
- ✓ Add value to the scope of services offered by an organization
- ✓ Have detailed, quantifiable benefits, which should be in the application narrative
- ✓ Support low- to moderate-income individuals by providing services which improve the quality of life
- ✓ Support diverse and/or historically underserved communities
- ✓ Fund collaborative programs and programs which leverage additional dollars into

the community

**We do not support:**

- Programs serving residents of communities outside our geographic footprint
- Individuals
- Private foundations
- Political candidates, lobbying or advocacy organizations
- Organizations with a limited constituency, such as fraternal or labor groups
- Religious organizations
- Athletic teams or social groups
- 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
- Organizations or events which are not open to members of the general public
- Research organizations or projects
- Fundraising events (e.g., golf tournaments, school events)
- Annual appeals
- Travel or conference expense for the organization's employees
- Funds to pay down operating deficits
- Trip and tours by groups or individuals
- Endowment funds
- Grant amounts less than \$5,000

## Application FAQ

**How do I apply?**

You must apply [online](#).

**How much is the grant?**

The minimum amount is \$5,000. You may apply for full or partial funding of a program.

**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?**

We accept applications on a bi-monthly basis, following our [funding calendar](#).

**When do you notify applicants?**

Applicants are notified according to the [funding calendar](#).

**Is there someone I can speak with if I have a programmatic question?**

You may contact your local Senior Regional Giving Manager:

New England: [Jennifer.Gabriel@td.com](mailto:Jennifer.Gabriel@td.com)

New York, Southern CT, and Northern New Jersey—Bergen/Passaic counties:

[Akash.Mahajan@td.com](mailto:Akash.Mahajan@td.com)

Pennsylvania, Central and South New Jersey: [Renee.Rattigan@td.com](mailto:Renee.Rattigan@td.com)

Delaware, Virginia, Maryland, Washington, D.C., North Carolina, and South Carolina:

[Jada.Thornton@td.com](mailto:Jada.Thornton@td.com)

Florida: [Seth.Dreyfuss@td.com](mailto:Seth.Dreyfuss@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 recommendations by the TD Charitable Foundation's regional grants committee and approved by the Foundation's Board of Directors.

**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.

The TD Charitable Foundation prohibits discrimination based on 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. Organizations which do not affirm their projects compliance with the TD Charitable Foundation's anti-discrimination policy are not eligible for funding from the TD Charitable Foundation.

## Application Checklist

The application has seven sections.

1. General Organization Information—such as name, address, phone number, website address, etc.
2. Contact Information—such as top executive information and request contact information if different
3. Additional Organization Information—such as year founded, mission, organization type, staff and volunteer information, etc.
4. Organization Financial Information—such as total revenue, total expense, net assets, explanation

regarding any significant changes in net assets position, in expense structure or/and in revenue generation, top funders, etc.

5. Request Information—such as program title, requested donation amount, program budget
6. Required documents
7. Acceptance of Grant Conditions, should your organization be chosen for funding.

In order for your funding request to be considered, you must attach the following 4 required documents to the online donation application. Required documents must be in either PDF format or Word format.

1. A detailed program proposal (3 pages maximum), including the following:
  - A brief background of your organization and a history of its programs
  - A detailed description of the program for which your organization seeks funding, including the objectives of the program
  - A description of the need of the program, including the population and the geographical area served, and identification of any gaps in existing services or programs which would be met through funding this proposal
  - A timetable of the program
  - A description of measurement tools you will use to determine the success of the program
  - A detailed communication and public relations plans to publicize this donation and its results
2. A list of your organization's Board members including their board position, their employer and their job title
3. 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, which is a simple return

Note: We will not accept the 990N or Postcard.

4. 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; or, a letter on official letterhead providing the nine-digit tax identification number of the applying government entity or public school and signed by the senior officer
5. Your organization's current operating budget
6. A budget for your proposed project
7. A letter from an executive of your organization certifying that the TD Charitable Foundation may use any pictures your organization sends to us as a part of this submission for newsletters showcasing Foundation activities

## 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](mailto: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: [cgadmin@cybergrants.com](mailto:cgadmin@cybergrants.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?**

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](mailto:us-charitablegiving@td.com).

### **What is the reporting period for this impact report?**

The e-mail 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 2018, please report on all activities completed from November 2018 through August 2019.
- If your grant date says April 2019, please report on all activities completed from April 2019 through January 2020.

### **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.

### **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 contact your Senior Regional Giving Manager at TD and notify them. 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.

You will not be penalized in any way for not completing this year's report under these circumstances.



**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.

**The COVID-19 pandemic has forced us to change/defer/cancel the activities that we originally planned when we got the grant from TD. Should we still complete the impact report?**

If you have the capacity to complete the report this year, yes, we would like to hear from you. Given the pandemic, many of TD's community partners have had to adjust, delay, defer or pivot their activities, and it's important for TD to learn about how this affected your organization and your beneficiaries.

If you've already discussed the adjustments to your activities with your primary contact at TD, then you should see two additional questions on the report so that you can share how you used TD funding to specifically address the impact of the pandemic. These questions should not add undue burden to the task of completing the report and will help TD learn how we can continue to provide flexible support to organizations and communities at this difficult time.

However, we're also aware that many partner organizations will be struggling with greatly diminished capacity and emergency situations, which may preclude your ability to complete the report. If your organization is facing these kinds of circumstances, please let TD know via your primary contact, and we can defer your reporting to a later date—in no way will your organization be penalized for this.