



NEWPROFIT

Health Equity Cohort Application Guide

Fall 2021

Application Guide Overview

This Application Guide is designed to walk you through the completion of New Profit's Health Equity cohort application. We have done our best to anticipate the questions you may have as you complete this form. If anything remains unclear once you've consulted this guide, please email the Health Equity cohort team at catalyze@newprofit.org.

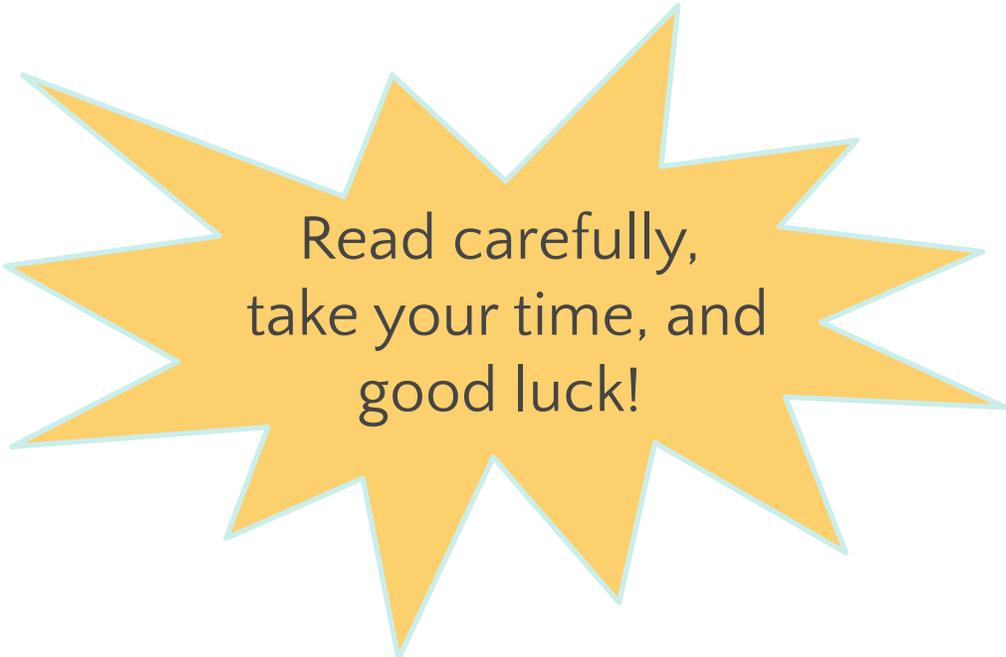
In this Guide...

Completing the Application

- Getting started
- Investment Selection criteria
- Application questions

Submission deadline & key dates

Additional Resources



Read carefully,
take your time, and
good luck!

Getting Started

A few technical notes as you begin:

- The SurveyMonkey platform does not allow users to save partially completed forms to return to later, so you will want to complete and submit the form in one sitting. We recommend writing responses in the [editable version](#) provided to you and then copying and pasting them into the SurveyMonkey form so that an unexpected loss of internet does not result in a loss of effort and time.
- You will not be able to access your responses once you submit your application. As a result, we recommend drafting and finalizing your responses in another document before submitting them through SurveyMonkey.
- Make sure your organization fits the criteria in the Eligibility Questions before filling out the rest of the form. You will not be able to submit a full application if your organization is not a match for the Health Equity cohort at this time.
- For questions requiring a written response, your response should be no longer than 260 words (400 words for the personal story). Note: The form will not cut you off, so please use a separate tool to ensure you submit responses within the word limit such as <https://wordcounter.net/>.
- For any files that you upload into the form, please include your organization's name in the filename. All file sizes are restricted to 16 MB.

Investment Selection Criteria Overview

All eligible organizations will be reviewed and assessed against New Profit's investment selection criteria. Please see below for an overview of the criteria we will be using for this cycle. New Profit is constantly learning and therefore evolving our view on these criteria and how we apply them. We have included here the high-level dimensions we look for and some examples of what we look at more specifically. We look holistically at organizations and their strengths and growth edges across these dimensions. We look at these dimensions across application review and interviews. Not all of them will be addressed directly in this current application stage.

Note that given this commitment to learning and evolving our approach, these dimensions differ slightly from those on our website.

Equity & Proximity

Equity is the overall objective of our portfolio work and we believe it can only be achieved through fundamental systems change. We look for organizations that are centering equity and proximity internally as individuals, in work with teams, as well as in the core of their work in the world. A few of the things we are looking for are:

- **Awareness:** Social entrepreneur demonstrates awareness of how their identities influence their leadership footprint and a desire to understand this more deeply
- **Proximity:** Social entrepreneur strives to better understand the experiences of the communities their organization serves through the approach to their work, measurement, and continuous learning.

Investment Selection Criteria

Impact Model

We look for organizations that are committed to centering equity and systems-level change as the ultimate purpose of their work. We seek to invest in a diversity of models that target different root causes of health inequities. A few of the dimensions of impact models we consider include:

- **Theory of Change:** Organization's definition of the problem is rooted in an understanding of systemic inequities and the ways they manifest in the experiences of individuals within historically marginalized communities
- **Early Evidence of Impact:** Organization is clear about the impact it aims to achieve and demonstrates promising outputs and outcomes
- **Centering Constituents:** Organization demonstrates a commitment to continuous learning in its approach to impact, including a commitment to incorporating feedback from a diverse set of stakeholders

Investment Selection Criteria

Adaptive Leadership

We believe the organizations that will most sustainably catalyze systemic change over time are those that are best positioned to make adaptive choices and innovate, centering the communities they serve. For this reason, we see leadership as a set of competencies and orientations that allow leaders and teams to navigate changing contexts. A few dimensions of leadership we consider include:

- **Learning Orientation:** Social entrepreneur demonstrates an openness to: learning, seeks feedback to growing from a wide range of partners, and actively integrates that feedback
- **Network builders:** Social entrepreneur demonstrate a strong ability to galvanize constituent buy-in and/or partnerships that accelerate the organization's mission and impact

Investment Selection Criteria

Sustainability

An important aspect of our ability to support an organization is understanding its overall sustainability from a financial and team perspective. Some of the dimensions we consider include:

- **Financial Health & Management:** Organization's financials demonstrate financial viability
- **Senior Team Composition:** Organization leadership, including social entrepreneur, is composed of multiple talented members (skills and experience) with diverse backgrounds and experiences
- **Board Engagement:** Key members of the organization's board are overall aligned with social entrepreneur's vision and approach to impact and organizational management

New Profit Fit, Cohort Fit & Value Add

Using the criteria above, we also assess our potential to add value for an organization based on:

- New Profit's strategic support capabilities and partnership, and their potential to accelerate impact and sustainability of the organization
- Social entrepreneur desires a candid, collaborative relationship based on a rigorous exchange of ideas
- Social entrepreneur and organization are excited and committed to being a part of the cohort with peer organizations

Application Questions

Preliminary Questions (1/3)

- 1. Name of organization** – List the name of your organization in full as it appears on your 990 form.
- 2. Social entrepreneur's name** – Provide the name of your organization's social entrepreneur. We define a social entrepreneur (CEO, ED, or equivalent title), as both the leader and final decision-maker of an organization's internal/external strategy, daily operations, and financial decisions. Outside of your board, the buck stops with you.
- 3. Is your organization a 501(c)(3)?** – Let us know whether your organization has 501(c)(3) status with the IRS. Your organization is also eligible if your fiscal sponsor has 501(c)(3) status.
- 4. Has your organization been in operation between two and five years?** – Calculate this based on the year your organization was legally founded.

Application Questions

Preliminary Questions (2/3)

5. **Does the social entrepreneur work for your organization on a full time (-40 hours/week) basis?** – Let us know whether your organization’s leader is committed to the organization for at least 40 hours/week.
6. **Does the social entrepreneur plan to stay at the organization for the duration of cohort programming?** – If the social entrepreneur has plans to leave your organization before the end of cohort programming, answer “no.”
7. **Programming: Social entrepreneurs in the Health Equity cohort will engage in monthly 1:1 coaching, three convenings (typically spread out over 2-3 days; likely virtual but possibly in-person in later 2022) and three 2-3-hour virtual learning sessions over the course of one year. Does this potential time commitment seem feasible for you and your organization?** – Depending on the situation around the pandemic, convenings may shift from virtual to in person in Boston if or when it is completely safe to do so. Please consider whether possibly traveling for convenings three times throughout programming would impact your attendance (and note that New Profit covers travel expenses for portfolio social entrepreneurs).

Application Questions

Preliminary Questions (3/3)

8. Ability to commit to and attend ALL programming is required for selection into the Health Equity cohort. Can you attend the first convening in March? If not, we will not be able to consider your organization. All other program dates will be shared during the interview process and you will be asked to confirm your availability. Note: Convenings may be full or half-days depending on whether virtual or in-person in Boston.

Convening #1: March 8 - 10, 2022

We are looking to partner with social entrepreneurs who can fully engage in all cohort programming. Please let us know if this time commitment is feasible for you and your organization.

Application Questions

Applicant and Social Entrepreneur Information (1/2)

We are aware that in some cases, the social entrepreneur will delegate completing the application to another team member and have included these questions to ensure we have contacts for both.

9. **Applicant's full name** – Provide us with your first and last name.
10. **Applicant's job title** – Let us know your position within the organization.
11. **Applicant's email address** – Provide us with the best way to reach you via email.
12. **Applicant's preferred phone number** – Let us know the best way to reach you via phone.
13. **Founder(s) of the organization** – List the name(s) of the founder(s) of your organization. If the founder(s) are still with your organization, please include their current title(s).
14. **Social entrepreneur's (CEO/ED) email address** – List the leader of your organization's email address –this should be the same individual as the social entrepreneur in question #2.

Application Questions

Applicant and Social Entrepreneur Information (2/2)

15. Please provide the full name of the person on your team in charge of scheduling. – This person should handle scheduling for your CEO/ED.

16. Please provide the email address of the person on your team in charge of scheduling. – Provide us with the best way to reach this person via email.

17. Which of the following describe(s) how the CEO/ED identifies? Please check all that apply. – Check all gender identities and personal pronouns that apply to the individual listed in question #2.

18. Which of the following describe(s) how the CEO/ED identifies? Please check all that apply. – Check all racial/ethnic identities that apply to the individual listed in question #2.

19. Please upload the ED/CEO's resume or bio in PDF or DOC/DOCX form. – Please include your organization's name in your filename.

Application Questions

Organizational Information (1/3)

20. Organization's website URL – Please share the link to your organization's website.

21. What is your annual organizational budget? – Calculate this based on your annual projected operating budget for the fiscal year you are currently operating in.

22. Is your organization fiscally sponsored? If so, please share the name of your fiscal sponsor. – If your organization is fiscally sponsored, we ask that you share the name of your fiscal sponsor here.

23. Is your organization a previous New Profit grantee? – Let us know if your organization has previously received funding from New Profit.

24. Year founded – List the year your organization was legally founded.

25. Location of headquarters (city, state) if applicable. If your organization is fully virtual, please indicate "virtual" – List the location of your headquarters, including both city and state. If you are a national organization with regional and national headquarters, please list the national headquarters only.

26. Optional: In what geographies does your organization operate? Please also note the number of program sites in each geography, if applicable. For example, "Boston, MA (2)" – List the number of program sites your organization is currently operating. A program site is a location where services are provided, and it may or may not have full-time staff dedicated to it.

Application Questions

Organizational Information (2/3)

27. Number of full-time employees by year (2020, 2021, 2022 projected) – For 2020 and 2021, list the number of employees that work or worked at least 40 hours per week for your organization. Please do not include volunteers or interns in this number. For 2022, provide a projected number or your best estimate.

28. Number of part-time employees by year (2020, 2021, 2022 projected) – For 2020 and 2021 list the number of employees that work or worked less than 40 hours per week for your organization. If you hire paid interns, you may include them here. Please do not include volunteers or unpaid interns in this number. For 2022, provide a projected number or your best estimate.

29. Number of volunteers by year (2020, 2021, 2022 projected) – For 2020 and 2021 list the number of volunteers that your organization works or worked with. You may include unpaid interns in this number. For 2022, provide a projected number or your best estimate.

30. Does your organization have a 501(c)(4)? – Let us know whether your organization has a 501(c)(4).

Application Questions

Organizational Information (3/3)

31. Was your organization fully virtual before the COVID-19 pandemic? – We define “fully virtual” as working and serving communities online or virtually, rather than in person.

32. Do you envision your organization being fully virtual post-pandemic? – We understand that this decision might not be made yet. Provide your best estimate.

Application Questions

Program Model & Story (1/3)

33. Issue Area: How does your organization define health equity?

We find that different organizations define health equity in different ways. We would like to understand how you and your organization define health equity with respect to your mission, vision, and values.

34. Strategy: Does your organization's strategy fit into one or more of the Health Equity cohort's focus areas? Check all that apply.

We are interested in seeing which of the focus areas coincide with your work. We would like to understand where you and your organization is targeting systems change. Are you focused more on dismantling racism and bias? Maybe your organization instead is addressing a specific driver of health such as housing, education, etc.? Or are you focusing your efforts on the actual health care system infrastructure i.e. payers, insurance, hospital systems?

35. Problem: Within the broad space of health equity, what is the problem your organization is addressing? We are interested in understanding your perspective on both the symptoms of the problem AND what you believe to be the root and systemic cause(s) of the problem.

We would like to understand how your organization views the problem you address. How is your definition of the problem rooted in an understanding of systemic inequities and the ways they are experienced by individuals within marginalized communities?

36. Approach or Program Model: What is your organization's core approach or program model to address the problem? We want to understand what your organization does day to day. Does your approach or model further equity for the communities you serve? If so, how?

Sometimes when we hear a nonprofit "pitch" for the first time, we have difficulty discerning what the organization does day to day. Help us understand the key elements of your work and how they fit together. Think about the communities served or systems impacted by your organization and tell us how they experience your work and how this work is focused on advancing equity in these communities or systems. Be specific and explain how your approach operates in practice.

Application Questions

Program Model & Story (2/3)

37. Entrepreneurial Insight & Stakeholders: What unique insight led you to your particular solution to this problem? What role have your stakeholders – the community or communities your organization serves – played in developing your organization’s agenda/strategy for change?

All great solutions grow from a core revelation about how a specific problem could be addressed. For example, a direct service program model that offers low-income high school students the opportunity to start their own businesses is predicated on the insight that entrepreneurship, when combined with academic and college preparatory support, activates students’ academic achievement and college aspirations. Tell us about the insight that lies at the heart of your solution and how it drives the way you have crafted your program model.

Additionally, we are interested in learning about the role that your stakeholders play in (a) developing your organization's agenda/strategy for change and in (b) executing your approach. You may provide examples to help describe what these roles have looked like.

38. Who do you consider to be your organization’s peers, and what about your organization’s approach makes you stand out?

We would like to better understand where your organization fits within the health equity space and the role that you play as a systems actor within that space. Why should we invest in you and your approach?

39. What challenges is your organization facing in pursuing health equity?

We’d like to understand what challenges exist at the organizational level. What are the barriers to your organization pursuing health equity? What resources, connections, or opportunities would address those barriers?

Application Questions

Program Model & Story (3/3)

40. As a sector, what are the barriers that prevent you and/or your organization from achieving your vision?

We'd like to understand what challenges exist at the field level. Are there certain actors you need to be connected with? Is there a need for a shared definition of health equity? Do you need more access to funding or specific types of funding?

41. Personal Story: We believe that people's backgrounds and awareness of their identities deeply influence their leadership and decision-making. How does your identity and lived experience influence your leadership, insights, and decision-making? (400 words)

We ask that the social entrepreneur respond to this question in the first person so that we can learn more about them as a leader. When writing your response, we encourage you to think about your racial/ethnic identity, socioeconomic status, gender identity and expression, regional identity, lived experiences, educational attainment, etc.

42. Internal Organizational Equity: What are your organization's equity priorities for your team and culture? How does equity inform your talent strategies? Recognizing that Diversity, Equity and Inclusion is a journey and not a destination, where do you think your organization is doing well and what is your vision for success in continuing to advance equity internally?

Please share how your organization is working to understand systemic barriers experienced by people of different identities within your organization and how your organization is gathering their insight and feedback for improvement.

Application Questions

Impact (1/3)

43. Organizational Growth & Expanded System Influence: In the next 3–5 years, how do you aspire to contribute to systemic change? Which systems conditions (policies, practices, resource flows, relationships, power dynamics, and narratives/mental models) do you seek to address? Which levers will you use to influence those conditions?

Bill Drayton, founder and Chief Executive Officer of Ashoka, proposed that “social entrepreneurs are not content just to give a fish or teach how to fish; they will not rest until they have revolutionized the fishing industry.” Widespread, transformative, sustained social impact requires entrenched systems, such as education or public health, to shift so that they produce different results. In this question, please articulate your theory about what kinds of systemic changes might result, in the long-term, from your work, and the approaches you are now pursuing to help bring this change about. Examples of strategies for achieving systemic impact include: demonstration of “proof points,” accompanied by influence strategies, to alter public opinion or shift the way a field of practice operates; coalition-building to shift public policy; social movements; and more.

Please do not describe your organization’s growth plan here. We recognize that your program model will not likely reach every person in America that needs your services. Therefore, we are interested in how your organization aims to change the system in which the problem you address is currently entrenched. Find more resources on how New Profit views systemic change [here](#).

Application Questions

Impact (2/3)

44. Impact I: How does your organization define and measure impact? What evidence, qualitative or quantitative, do you have of the effectiveness of your organization's approach or program model? How do you obtain that evidence?

We are interested in understanding how your organization views the results of your work. How does your organization make a case for the impact of your work using quantitative and/or qualitative data and anecdotal evidence? If your organization engages in systems change work, please describe how you are assessing the quality of your efforts and how you intend to measure progress.

If you have conducted formal evaluations of your program, please describe the findings briefly. If applicable, please describe the assessment tools you use to measure effects.

Application Questions

Impact (3/3)

45. Impact II: Please describe the core constituents your organization serves. If relevant, please share the total number of core constituents served in FY2020 and FY2021.

How does your organization define your core constituents? What are the communities or systems actors your organization works most closely with to bring about your impact? If applicable to your organization's approach, how many core constituents has your organization served over the past two years?

46. Impact III: Share an anecdote that brings to life your organization's impact on a community, institution, or individual.

We want to understand how your organization engages with the communities you serve or systems you work with. To that end, we ask you to help us visualize your work and relationships with a community, institution, or individual. Beyond that, we encourage you to be creative with your answer in order to convey the unique and meaningful work that you do to partner with your community.

Application Questions

Financials and Funding (1/3)

- 47. **Fiscal year start month** – Input the month that your fiscal year starts.

- 48. **Fiscal year end month** – Input the month your fiscal year ends.

Application Questions

Financials and Funding (2/3)

49. Total annual operating budget (2020, 2021, 2022 projected) Report here the dollar amount of your annual operating budget expended or projected in each fiscal year for 2020, 2021, and 2022. The calculation should include all expenses incurred in the regular operation of your organization. Capital purchases and one-time payments should be excluded.

50. 2020 total annual cash in

51. 2021 total annual cash in

52. 2022 total annual cash in

Categories: earned income, foundation, government, other, total. Report each category's dollar amount that you received in the fiscal year that is available to spend during that fiscal year. If you have "other" to report, define that funding source in the same box. For 2022, report each category's dollar amount that you received or project to receive.

We recognize that the categories listed above for cash in are not necessarily parallel. For example, your organization may receive earned income from a government agency. In that case, we ask that you use your judgement to place dollar amounts where they fit best. Please feel free to note any anomalies in the "other" box with a brief description.

Application Questions

Financials and Funding (3/3)

53. Who were your organization's two largest funders in 2021? Please include in parentheses what percentage of your 2021 annual revenue came from each funder, e.g., "The Fantastic Foundation (15%)" List your organization's two largest funders whose contributions went towards your organization's cash in for the previous fiscal year. This refers to your largest individual funders or contracts, not funding category (i.e., the name of a philanthropic funder or fee-for-service contract).

54. Optional: Please describe or explain any significant fiscal anomalies related to your organization that may arise in the application. We understand that the past year and a half brought significant and often unprecedented change for many organizations. In this space, we invite you to elaborate on or explain any fiscal anomalies changes your organization experienced during or before the pandemic so that we can continue to build a holistic understanding of your organization beyond the pandemic.

55. Please upload your organization's 2022 projected budget or, if that is not available, your organization's 2021 budget. You may upload a PDF, DOC/DOCX, PNG, OR JPG/JPEG. If available, please upload your organization's 2022 projected budget. We recognize that this may not be possible for some organizations, in which case, we ask that you upload your organization's 2021 budget. Please include your organization's name in your filename.

Application Questions

Team (1/1)

56. What percentage of your staff identifies as people of color? – Please provide the percentage of your staff, including part-time and full-time employees and your leadership team, that identifies as people of color.

57. What percentage of your leadership team identifies as people of color? – Please provide the percentage of your leadership team, however you define it, that identifies as people of color.

58. What percentage of your board identifies as people of color? – Please provide the percentage of your board that identifies as people of color.

Application Questions

Peer Learning Community (1/1)

59. Why are you applying to the Health Equity cohort? Why do you want to be a part of a peer learning community like the Health Equity cohort?

With the Health Equity cohort, we aim to build a collaborative and accountability-focused learning community. We would like to understand why you are interested in joining the Health Equity cohort and how you see yourself contributing and learning from your engagement with peers in the cohort. Where do you believe that your experiences or knowledge could contribute to the peer learning process?

60. What are your 2022 organizational capacity building priorities in order to achieve your vision? – We would like to understand the capacity building areas that you are prioritizing for your organization over the course of the 2022 programming year.

61. Other Commitments: Are you currently participating in a capacity development program? If so, please name the program and the time commitment. – Let us know if you are currently engaged in a capacity development program and, if so, provide the name and time commitment of the program (i.e., hours/month).

62. How did you hear about New Profit and/or this funding opportunity? (Check all that apply)– We are interested in gathering data regarding the best avenues to reach proximate, innovative leaders.

Submission Deadline and Key Dates

- **Thursday, October 7** | Health Equity cohort application launches
- **Thursday, October 21** | Informational webinar from 4–5PM ET
- **Monday, November 1** | Health Equity cohort applications close at 5PM ET
- **November – December** | Diligence
- **January 2022** | Announcement of selected organizations
- **March 2022** | Program kick-off

Additional Resources

1. Cohort Launch Announcement
2. SurveyMonkey Application
3. Editable Version of the Application Template

Thank you!

Thank you for your time and the thought you are putting into completing your application. We look forward to learning more about you and the amazing work your organization is doing!

If you still have questions after reviewing this guide, please reach out to the Health Equity cohort team at catalyze@newprofit.org and include “Health Equity Cohort” in the subject line.