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Strategic Growth. Lasting Impact.

FOUNDATION RESEARCH · WORK SAMPLE

Funder Research Brief

Prioritized foundation prospects for Second Shift
Prepared for Sandbar Community Kitchen

PREPARED FOR	Sandbar Community Kitchen · Renata Oliveira, Executive Director
PROGRAM	Second Shift paid culinary training · $118,600 annual cost · $60,000 to raise for 2027
SCOPE	Massachusetts and regional private, family, and corporate foundations; 2027 deadlines
PREPARED BY	Jesika Davis, Founder & Principal Consultant · November 2026

About this sample. Sandbar Community Kitchen, Westhaven, and all eight foundations in this brief are fictional, as are their program officers, giving histories, and deadlines. The format is the one I deliver to real clients: a short list ranked by fit, a one-page profile of each top prospect, the calendar, and what I would do first. A real brief draws on funder 990-PFs, published guidelines, grants databases, and conversations with program staff.

Most nonprofits apply to too many funders and research too few. Six well-matched prospects, each with a named contact and a reason to care, beat a list of forty.

01

The short list

Eight funders screened from an initial list of 31. Ranked by fit: whether they fund workforce or food-access programs in Bristol County, whether a $10,000 to $30,000 request is in their normal range, and whether Sandbar has a path to a conversation before applying.

#	FUNDER	FIT	ASK	DEADLINE	WHY THEY'RE ON THE LIST
1	Eldridge Family Foundation	STRONG	$25,000	Feb 15	Funds job training in Bristol County; gave Tidewater Recovery House $20K in 2025; board member Ellen Marsh knows a trustee.
2	Fairwater Savings Bank Charitable Foundation	STRONG	$10,000	Rolling (Q1 best)	Branch in Westhaven; "economic opportunity" priority; 2024 grant to Westhaven Food Bank $7,500. Sandbar has never applied.
3	Greater Westhaven Community Trust · Opportunity Fund	STRONG	$15,000	Mar 31	Workforce-development cycle; Sandbar received $10K in 2024 for the dining room. Hallowell Family Fund is housed here.
4	Alder Street Foundation	GOOD	$20,000	LOI May 1	Statewide; reentry employment is a named priority since 2023. No South Coast grantees yet; they have said they want one.
5	Costa & Sons Fisheries Foundation	GOOD	$5,000	Sep 30	Westhaven-based corporate foundation; small grants to local food and youth programs. Relationship, not revenue.
6	Marion Pryor Trust	GOOD	$10,000	Jun 1	Bank-administered trust; feeds "the hungry of Bristol County." Dining room fits; Second Shift is a stretch. Apply for meals, not training.
7	New England Culinary Workforce Fund	WATCH	$30,000	Invite only	Perfect mission match; funds by invitation after a site visit. Ask Alder Street's program officer for an introduction.

#	FUNDER	FIT	ASK	DEADLINE	WHY THEY'RE ON THE LIST
8	Whitcomb Charitable Foundation	LOW	—	—	Funds food access but only in Plymouth County. Screened out; included so no one re-researches it.

WHAT THE LIST ADDS UP TO

If the top four come in at the recommended asks, Second Shift's 2027 gap of $60,000 is covered with $10,000 to spare. The realistic case, with one of the four declining, is $45,000 to $50,000. The Pryor Trust and Costa & Sons are for the dining room and the relationship, respectively, and should not be counted toward the training gap.

02

Funder profiles

1. Eldridge Family Foundation

Based	New Bedford, MA · family foundation, est. 1998 · assets about $42M
Gives	About $1.9M a year, 60–70 grants; median grant $20,000; range $5,000–$75,000
Priorities	Economic opportunity, youth, and health in Bristol County. "Programs that lead to employment" is named in the guidelines.
Relevant grants	Tidewater Recovery House $20,000 (2025, job readiness); Westhaven Food Bank $15,000 (2024); South Coast YouthWorks $30,000 (2023–2025, three years)
Process	Online application; Community Investment Grants due Feb 15 and Aug 15; decisions in 10 weeks; site visit for new applicants over $15,000
Contact	Daniel Oyelaran, Program Officer. Takes calls before applications; prefers a 20-minute conversation to a long email.
Connection	Ellen Marsh serves on the library board with trustee Catherine Eldridge-Brooks.
Ask	$25,000, program support, one year. Full proposal drafted (see Grant Proposal sample).

Next step: Ellen emails Catherine Eldridge-Brooks before Thanksgiving to say Sandbar will apply and ask whether a call with Daniel is welcome. Renata calls Daniel the first week of December.

2. Fairwater Savings Bank Charitable Foundation

Based	Fall River, MA · corporate foundation of Fairwater Savings Bank (14 branches, one in Westhaven)
Gives	About $650,000 a year across its footprint; most grants $2,500–$10,000
Priorities	Affordable housing, economic opportunity, financial education, basic needs. Each branch region has an advisory committee.
Relevant grants	Westhaven Food Bank $7,500 (2024); Westhaven Housing Partnership $10,000 (2025)
Process	Rolling online application; regional committee meets quarterly; first-quarter requests have the most money left
Contact	Lisa Tavares, Community Relations Manager, Westhaven branch. On the regional advisory committee.
Connection	None yet. Sandbar banks elsewhere, which the committee will notice; be ready to answer.

Ask	$10,000 toward trainee wages, with a request that Fairwater's Westhaven branch host a graduate hiring lunch

Next step: Renata invites Lisa Tavares to a Tuesday dinner in January. Apply in February for the March committee meeting.

3. Greater Westhaven Community Trust · Opportunity Fund

Based	New Bedford, MA · community foundation · competitive cycles by fund
Gives	Opportunity Fund: about $400,000 a year in workforce and adult-education grants, $5,000–$25,000
Relevant grants	Sandbar $10,000 (2024, dining room equipment); South Coast YouthWorks $25,000 (2025); Tidewater Recovery House $15,000 (2025)
Process	LOI Mar 31, invited proposals May 15, awards July. Past grantees in good standing can skip the LOI.
Contact	Marcia Dias, Senior Program Officer. Knows Sandbar; visited in 2024. Sandbar's 2024 final report is on file and was on time.
Note	The Hallowell Family Fund is housed at the Trust. Do not reference it in the application; donor-advised funds are separate from competitive grants, and the Trust is careful about that line.
Ask	$15,000 for the employment coordinator and placement costs across both cohorts

Next step: Renata emails Marcia in January to confirm Sandbar can go straight to the proposal stage, and to ask whether the coordinator position is a better fit for the Opportunity Fund or the Trust's Capacity Fund.

4. Alder Street Foundation

Based	Boston, MA · private foundation · assets about $180M
Gives	About $8M a year statewide; workforce grants $20,000–$60,000, usually two years
Priorities	Reentry employment named as a priority in 2023 strategy; 2025 annual report says the foundation "has not yet found partners on the South Coast."
Process	LOI by May 1 (two pages); full proposal by invitation in July; decisions November. New grantees usually start at $20,000.
Contact	Priya Raman, Program Director, Economic Mobility. Spoke at the 2026 Massachusetts Nonprofit Network conference about wanting "small, operator-led programs with real wage data."
Connection	None direct. Tidewater Recovery House's director met Priya at the conference and offered to introduce Renata.

Ask	$20,000 a year for two years, for Cohort 2 wages and the six-month employment tracking Alder Street asks for

Next step: Take the Tidewater Recovery House introduction in January. Have the 2025 wage and retention data in one page before the call; it is what Priya said she wants to see.

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Calendar and first moves

WHEN	FUNDER	ACTION	OWNER
Nov 2026	Eldridge	Ellen Marsh emails Catherine Eldridge-Brooks	Ellen
Dec 2026	Eldridge	Call with Daniel Oyelaran; confirm Feb 15 cycle and site-visit timing	Renata
Jan 2027	Fairwater; South Coast Trust; Alder Street	Lisa Tavares to Tuesday dinner; email Marcia Dias; take Alder Street introduction	Renata
Feb 15	Eldridge	Submit proposal	Jesika / Renata
Feb 2027	Fairwater	Submit for March committee	Jesika
Mar 31	South Coast Trust	Submit proposal (or LOI if required)	Jesika
May 1	Alder Street	Submit LOI with 2025 wage data	Jesika
Jun 1	Pryor Trust	Submit dining-room request	Jesika
Sep 30	Costa & Sons	Submit small request; invite to Cohort 2 graduation	Renata

Three things to do before any application goes out

1. **One page of 2025 outcomes.** Enrolled, completed, certified, employed at 90 days, starting wage. Every funder on this list will ask for it, and Alder Street will not take a call without it.
2. **A clean overlap answer.** Eldridge pays weeks 1–3 wages and the coordinator; South Coast Trust pays coordinator and placement; Alder Street pays Cohort 2 wages. Write it once, in one paragraph, and reuse it so no funder sees the same dollar twice.
3. **Update the Candid profile.** Three of these funders check it. Sandbar's shows the 2023 budget and no program outcomes.

Screened out, and why

- **Whitcomb Charitable Foundation:** Plymouth County only.
- **Massachusetts Workforce Innovation Fund:** State program; minimum grant $100,000 and requires a registered training provider. Revisit in 2028 if Second Shift reaches three cohorts.

- **Nineteen others:** National foundations with no Massachusetts giving, funders closed to new applicants, or giving ranges under $2,500. List available on request.

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Work sample. All organizations, foundations, people, grants, and figures in this document are fictional.