

Community Grants Fund Application Guide 2019-2020 Grant Cycle

In 2016, The San Bruno Community Foundation created the Community Grants Fund. This responsive grantmaking program allows local community groups to apply for grant funding to support new or existing programs that benefit the San Bruno community. Funded by a portion of the restitution funds resulting from the City of San Bruno's settlement with Pacific Gas & Electric Company following the 2010 gas pipeline explosion that devastated San Bruno's Crestmoor neighborhood, the Community Grants Fund invests in the many local organizations that form the lifeblood of the San Bruno community.

This document has two main sections:

- I. **Program Guidelines**, which explain the Community Grants Fund, eligibility requirements, funding priorities, criteria, conditions for acceptance of grants, and program timeline
- II. **Application Instructions**, a detailed explanation of each page of the online Grant Application to assist applicants in completing the form

APPLICATION DEADLINE:
Wednesday, September 25, 2019, 5:00 p.m.

The Community Grants Fund is funded with support from



I. Program Guidelines

A. Grant Awards

Grant Size: The Foundation has the discretion to determine the amount of each grant in connection with the Community Grants Fund. Grants to an organization will not exceed \$25,000 in a grant cycle. Requested grant amounts must be substantiated by the program budget.

A single Applicant Organization may apply for funding for more than one program, but must complete a separate Application for each program for which it is seeking a grant. Please note that a single Applicant Organization is unlikely to receive funding for more than one program in a given grant cycle.

For the 2019-2020 grant cycle, with support from YouTube and Google.org, the Foundation intends to award, in connection with the Community Grants Fund, multiple grants totaling \$300,000 that benefit a diverse cross-section of the San Bruno community. The number of grants provided will depend on a number of factors, including the number and quality of Applications received. The Foundation may elect to fund proposals at less than the requested amount.

Duration and Frequency of Grant Awards: Grant awards are to be used within a one-year period (the 2020 calendar year for this cycle of grants). Grantees are able to apply for funding for the same program for up to three consecutive years. After three years of consecutive funding for a particular program, the grantee is required to wait at least one year before reapplying for funding for that program. The grantee would be able to apply for funding in the fourth year for a different program.

B. Eligible Organizations

The Community Grants Fund is generally open to the following types of organizations that engage in activities to benefit the San Bruno community:

- 501(c)(3)* public charities
- 501(c)(4), 501(c)(5), and 501(c)(6) organizations that meet the public support tests described in 509(a)(2)
- Governmental units that are described in 170(b)(1)(A)

* All numerical references are to specific sections of the Internal Revenue Code (IRC).

Notwithstanding the list above, entities not eligible for Foundation funding include 509(a)(3) supporting organizations, 509(a)(4) organizations organized and operated exclusively for testing for public safety, political organizations, organizations that the Foundation is prohibited by law from funding with public funds such as religious institutions and private schools, and organizations that unlawfully discriminate in violation of state or federal law, including on the basis of race, ethnicity, nationality, gender, disability, sexual orientation, gender identity, age, or religion.

Individuals are not eligible to apply for grants in connection with the Community Grants Fund.

The Foundation recommends that any Applicant Organization with questions about eligibility for a grant in connection with the Community Grants Fund, particularly 501(c)(4), 501(c)(5), and 501(c)(6) organizations, contact Foundation staff prior to completing an Application.

C. Activities Eligible for Funding

The Foundation offers two types of grant funding:

- Programmatic Support (including one-time projects, ongoing programs, or capital projects)
- Capacity-Building Support (to assist Applicant Organization in carrying out its mission more effectively)

The Foundation will not directly fund the following: (1) existing deficits, (2) direct contributions to restricted endowments, (3) lobbying or political activity, and (4) religious activity that government agencies are legally prohibited from funding.

D. Funding Priorities

Applications must be for programs that (1) benefit the San Bruno community and (2) fall within one of the Foundation's focus areas:

- Publicly owned community facilities
- Community health and safety
- Sports and recreation
- Education
- Youth activities
- Public spaces, parks, and open space
- Community building
- Human and social services for all
- Economic vitality
- Intra-San Bruno transit
- Healthy, stable, and affordable housing

The Foundation has embraced an inclusive definition of "community" to include those who live, work, attend school, and utilize community and commercial resources in San Bruno.

E. Criteria

Grant Applications will be evaluated on a variety of factors, including but not limited to:

1. Benefits of the proposed program to the San Bruno community
2. Proposal's alignment with one of the Foundation's focus areas
3. Program methodology and budget
4. Requested grant amount in relation to the anticipated community benefit
5. Organization's track record, stability, and financial health

F. Conditions

Prior to receipt of a grant, grantees will be required to sign a Grant Agreement and agree to comply with certain terms and conditions set forth by the Foundation, including but not limited to the following:

- Within 60 days of the conclusion of the applicable grant period, provide the Foundation with a year-end report documenting the use of the grant funds and describing programmatic accomplishments.
- Acknowledge The San Bruno Community Foundation on all printed materials and all publicity related to activities supported by Foundation grants.
- Immediately notify the Foundation of: (1) any changes in grantee's tax-exempt status; (2) grantee's inability to expend the grant for the specified grant purposes; and (3) any expenditures of grant funds made for any purpose other than the intended grant purposes.
- Provide requested documentation, including financials or evidence of tax-exempt status.
- Within 60 days, report to the Foundation regarding any major changes in personnel or volunteers that would affect the grantee's ability to carry out the funded program.

G. Timeline

- July 2019: Community Grant Application period opens
- August 20 and September 9, 2019: Grant Workshops
- September 25, 2019, 5:00 p.m.: Community Grants Fund Application deadline
- December 2019: Notification of Community Grants Fund awards
- 2020: Funding period

II. Application Instructions

These Instructions provide potential Community Grants Fund Applicant Organizations with guidance on submitting a Grant Application. In addition to offering general suggestions for writing a strong grant proposal, the Instructions review each section of the Community Grants Fund Grant Application, providing brief explanations of the questions and insights into the intent of the questions being asked.

A. Grant Application Deadline

All portions of the Grant Application must be submitted by 5:00 p.m. on Wednesday, September 25, 2019. Grant Applications must be completed online at www.sbcf.org. Failure to provide a complete Grant Application by the deadline will result in your Grant Application not receiving consideration.

B. General Tips for Writing Grant Proposals

We offer some general suggestions for drafting a strong Grant Application:

1. Follow the directions. Pay close attention to what is being asked and include only the materials specified.
2. Be clear, concise, and accurate. Make the case for your proposal in your own unique way, but include precise data. Avoid technical jargon. Use descriptive, active, and specific language; avoid generalizations and vague language. Economize content and avoid repetition.
3. Remember that the goal of the Community Grants Fund is to provide funding for programs that ***benefit the San Bruno community***, and, therefore, a strong proposal will successfully make the case that its program will enhance the quality of life for some segment of the people living and working in San Bruno. Highlight the organization's commitment to San Bruno, the issue to be addressed in San Bruno, and how the program will address that issue in San Bruno.
4. Proofread carefully. Make sure numbers add up and typos are removed.
5. When in doubt, ask for clarification. Questions can be emailed to grants@sbcf.org. Make sure you understand what is expected.
6. Don't procrastinate. Start working on your Grant Application well before the deadline to ensure sufficient time to ask questions and do further research as needed.

C. The Grant Application

The Community Grants Fund Grant Application is available at <https://www.sbcf.org/grant-application> and must be completed online. Paper applications will not be accepted.

Note that you do not need to complete the Grant Application in a single sitting. You can start filling out the online form, save your progress, and resume completing the Application at a later time.

Page 1. Grant Application Checklist

This page includes a list of all items required in a complete Grant Application. Read through the Checklist carefully before beginning a Grant Application. The Grant Application is in online form only and consists of an executive summary of the Applicant Organization, an executive summary of the grant proposal, a series of narrative questions regarding the Applicant Organization, a series of narrative questions regarding the purpose of the grant, and a set of supporting documentation. Note that some items in the list of supporting documentation do not need to be submitted by every Applicant Organization.

The Checklist also includes a list of four government databases that the Foundation, as part of its due diligence process, checks for the status of each Applicant Organization (Internal Revenue Service's (IRS) [Tax Exempt Organization Search](#),

California Secretary of State's [Business Search](#), California Franchise Tax Board's [Entity Status Check](#), and California Attorney General's [Registry of Charitable Trusts Verification Search](#)). The results of this due diligence review will be taken into consideration as part of the Foundation's evaluation of the Applicant Organization's track record, stability, and financial health. This due diligence review does not apply to governmental unit applicants, and certain other organizations may not be required to register with some of the above entities or otherwise appear in some of the above databases. If an Applicant Organization has any questions regarding its required registration with any of the above entities or appearance (or lack of appearance) in any of the above databases, it should contact the relevant entities and/or confer with appropriate legal counsel. In your response to Question #3 of Page 4 of the Grant Application, you will have the opportunity to explain any issues related to the organization's current status with any oversight entity, including the IRS, Franchise Tax Board, California Attorney General, and California Secretary of State.

Page 2. Executive Summary: Applicant Organization

In this section, you are to provide basic information about the **Applicant Organization** that is applying for the Community Grant.

- **Legal Name of Applicant Organization:** Provide the complete legal name of the Application Organization as it appears in its founding or other official documents (e.g., articles of incorporation).
- **Fictitious Business Name:** If the organization does business under a name other than its legal name, provide the "fictitious business name" (also known as a DBA ("doing business as")).
- **Fiscal Sponsorship:** If the Applicant Organization is serving as a fiscal sponsor for the program seeking funding, indicate so. Applicant Organizations serving as fiscal sponsors must contact Stephanie Rutgers, Program Consultant, at grants@sbcf.org for detailed guidance in completing this Application.
- **Website:** Provide the website address or URL for the Applicant Organization's website.
- **Tax Identification Number:** Provide the Applicant Organization's Federal Taxpayer Identification Number (TIN), an identifying number used for tax purposes in the United States and typically issued by the IRS.
- **Corporate or Organization Number:** If applicable, provide the organization's corporate entity number, which is the number that the Secretary of State assigns to every new entity, whether a corporation or LLC, when its articles of corporation or organization are approved.
- **Applicant Organization's Tax Status:** To be eligible to apply for a Community Grant, an Applicant Organization must be one of the following types of organizations, as defined by the noted sections of the Internal Revenue Code:
 - o A 501(c)(3) public charity
 - o A 501(c)(4), 501(c)(5), or 501(c)(6) organization that meets the public support tests described in 509(a)(2)
 - o A governmental unit described in 170(b)(1)(A)

Section 501(c)(3) is the portion of the Internal Revenue Code that allows for federal tax exemption of nonprofit organizations, specifically those that are considered public charities, private foundations or private operating foundations. Only 501(c)(3) organizations that are public charities are eligible for Foundation funding.

The IRS recognizes tax-exempt status for nonprofit social welfare organizations and local associations of municipal employees under IRC Section 501(c)(4). Common types of 501(c)(4) organizations include civic organizations like many Lions Clubs and Rotary Clubs. Labor, agricultural, or horticultural organizations may receive tax-exempt status from the IRS under IRC Section 501(c)(5). Section 501(c)(6) provides for tax-exempt status for business leagues, chambers of commerce, and other nonprofit business organizations. 501(c)(4), 501(c)(5), and 501(c)(6) organizations must meet the public support tests described in IRC Section 509(a)(2) to be eligible for SBCF funding.

Governmental units described in 170(b)(1)(A) include states and any political subdivision of a state, such as a municipality or a public school district.

The Foundation recommends that any Applicant Organizations with questions about their eligibility for a grant in connection with the Community Grants Fund, particularly 501(c)(4), 501(c)(5), and 501(c)(6) organizations, contact Foundation staff at grants@sbcf.org prior to completing a Grant Application.

- **Contact Person for this Grant Application:** Provide the first and last name, title, and email address for the person serving as the Applicant Organization's primary contact with the Foundation regarding its Grant Application.
- **Executive Director or equivalent:** If not already listed as the Contact Person, provide the first and last name, title, and email address for the Applicant Organization's executive director, CEO, president, or other person serving as the chief executive.
- **Address and Phone Number:** Provide the Applicant Organization's main address and phone number for all communications related to the Grant Application. Please note that an organization does not need to be incorporated or physically reside in San Bruno to be eligible for a Community Grant. Applicant Organizations must demonstrate that the program for which it is seeking funding benefits the San Bruno community (or some subset of the San Bruno community), but there is no preference for organizations based in San Bruno. For example, an organization based in Burlingame that provides service throughout San Mateo County could apply for a grant to support a program that specifically benefits San Bruno residents.
- **Year Founded:** Provide the year the Applicant Organization was first incorporated or publicly open for business.
- **Geographic Area Served:** List the geographic territory (*e.g.*, certain cities, counties, neighborhoods) that the Applicant Organization primarily serves through its operations.
- **Applicant Organization's Board of Directors and Officers:** List the names of the Applicant Organization's current Board of Directors or equivalent (*e.g.*, Board of Trustees for a school district) as well as its officers, including their titles.
- **Employees:** Indicate whether the Applicant Organization has employees or is entirely run by volunteers. If it has employees, indicate the number of full-time employees and part-time employees.
- **Ineligible Applicants:** SBCF is unable to fund certain types of organizations. If you indicate that the Applicant Organization is one of the following types of organizations, it is **not eligible** to apply for a Community Grant:
 - A 509(a)(3) supporting organization
 - A 509(a)(3) testing for public safety organization
 - A political organization
 - An organization that the Foundation is prohibited by law from funding with public funds, such as a religious institution or a private school
 - An organization that unlawfully discriminates in violation of state or federal law, including on the basis of race, ethnicity, nationality, gender, disability, sexual orientation, gender identity, age, or religion
 - An individual

Note: California law prohibits the Foundation from funding religious institutions directly. Nonprofit organizations that are not owned, operated, or controlled by a religious sect, congregation, denomination, church, or sectarian organization may apply. The project or program for which the organization is seeking funding must be purely secular and open to all without discrimination.

- **Past Community Grants Fund Grantees:** Indicate (a) whether the Applicant Organization has ever received a Community Grant from the Foundation and, if so, check the years of the grant cycle that apply, and (b) if it is applying for funding for a previously funded program or for a different program. Grantees are able to apply for funding for the same program for up to three consecutive years.

Page 3. Executive Summary: Community Grant Proposal

In this section, you are asked to provide brief information about the **program** for which the Applicant Organization is seeking Community Grant funding.

- **Type of Community Grant Requested:** Indicate whether the Applicant Organization is seeking funding for “Programmatic Support” or “Capacity-Building Support, defined as follows:
 - o “Programmatic Support” includes projects, programs, and capital projects:
 - A project is a planned undertaking or organized set of services designed to achieve specific outcomes that are *time-limited*.
 - A program is an organized set of *ongoing* services designed to achieve specific outcomes for a specified population that will continue beyond the grant period.
 - A capital project is a planned undertaking to purchase, build, or renovate a space or building or to acquire equipment or other capital assets.
 - o “Capacity-Building Support” assists an organization in carrying out its mission more effectively. Such efforts can include projects that strengthen the development of an organization’s core skills and capabilities, such as leadership, management, finance and fund-raising, programs and evaluation, in order to build the organization’s effectiveness and sustainability.

The Foundation anticipates that most proposed activities will fall under “Programmatic Support.” How you respond to this question will determine the second set of narrative questions (Page 5 of the Grant Application) you will be asked to answer. Those selecting “Programmatic Support” will receive one set of “Purpose of Grant” questions; those seeking “Capacity-Building Support” will receive a different set of questions related to the grant’s purpose.

- **Ineligible Activities:** SBCF generally does not fund certain types of activities. If you indicate that the activity for which the Applicant Organization seeks funding falls into one of the following categories, the program is **not eligible** to receive a Community Grant:
 - o Existing deficits
 - o Direct contributions to restricted endowments
 - o Lobbying or political activity
 - o Religious activity that government agencies are legally prohibited from funding
- **SBCF Focus Area(s) Being Addressed by this Request:** The Foundation focuses its funding on enhancing the quality of life in San Bruno, with an emphasis on enduring and long-term benefits. The areas of priority include the following list. Indicate which area(s) the proposed program addresses (more than one area can be checked):
 - o Publicly owned community facilities
 - o Community health and safety
 - o Sports and recreation
 - o Education
 - o Youth activities
 - o Public spaces, parks, and open space
 - o Community building
 - o Human and social services for all
 - o Economic vitality
 - o Intra-San Bruno transit
 - o Healthy, stable, and affordable housing
- **Program Name:** Provide a short name for the program for which Applicant Organization seeks funding.
- **Purpose of Grant (one sentence):** What is the desired result of the program in general terms? In a single sentence, provide the broad, overarching ***purpose of the program*** for which the Applicant Organization seeks funding.

- **Program Dates:** Provide the month and year for the beginning and end of the program. If it is an ongoing program and there are no current plans to terminate it, write “ongoing” in the “Ending” space.
- **Amount Requested:** Indicate in dollars (\$) the amount the Applicant Organization is seeking from the Community Grants Fund. The amount must be a whole number with no decimals or commas. Community Grants will not exceed \$25,000 to a single organization in a particular year.
- **Total Program Cost:** A summation of all the costs involved for the program, from inception to completion. The amount must be a whole number without any decimals or commas.
- **San Bruno Portion of Program Cost:** In some cases, Applicant Organizations seek funding for programs with a footprint larger than San Bruno (*e.g.*, they serve all of San Mateo County). Specify the portion of the total program cost, in dollars (\$), that will be used specifically to provide services to, address the needs of, or otherwise provide benefits to the San Bruno community. The amount must be a whole number without any decimals or commas.
- **Applicant Organization’s Annual Budget:** Provide total expenses from the Applicant Organization’s budget for the fiscal year in which awarded grant funds would be used. This figure should match the total expense line from the Applicant Organization’s Budget document uploaded on page 7. The amount must be a whole number without any decimals or commas.
- **Is this a new program?** Indicate whether this is the first time the Applicant Organization has run this program.
- **Is this a collaboration?** Indicate whether the program is a collaboration or partnership involving other organizations, and list those organizations. Organizations often submit joint proposals for funding to address common issues of organizational capacity and program outreach where they have similar outcomes to accomplish.

Page 4. Narrative: Organizational Information

The questions in this section give you an opportunity to tell the Foundation about the **Applicant Organization** generally (as opposed to the specific program for which you seek funding). All Applicant Organizations must complete this section. Short narrative answers of ***no more than 250 words*** are required for each question.

1. **Briefly describe the Applicant Organization’s history, mission, and goals.** Discuss the history of the organization and provide its current mission statement. What is this organization about? Why was it created? What issues does it seek to address? How has it changed over time? Explain the original issue and/or opportunity the organization was founded to address and how that may have changed over time. Offering a solid description of when, why, how, and if relevant, by whom the organization was founded, as well as how the organization may have changed over time, provides context for understanding an organization’s current reality.
2. **Briefly describe the Applicant Organization’s current activities, recent accomplishments, and future plans.** Tell the Foundation about the Applicant Organization’s current programs and projects, highlights and milestones, and aspirations beyond the grant period. Provide specific details that outline the depth and breadth of the Applicant Organization’s activities. To the extent that the organization has a record of activities in **San Bruno**, please note those efforts and achievements. An explanation of the organization’s activities benefiting and ties to the San Bruno community is especially important for organizations seeking capacity-building support.
3. **Is there anything else you would like to share about the Applicant Organization that reflects on its track record, stability, and/or financial health?** If applicable, please use this space to explain any issues related to the Applicant Organization’s current status with any oversight entity, including but not limited to the IRS ([Tax Exempt Organization Search](#)), California Secretary of State ([Business Search](#)), California Franchise Tax Board ([Entity Status Check](#)), and California Attorney General ([Registry of Charitable Trusts Verification Search](#)). One criteria that the Foundation will evaluate in its review of all Grant Applications is the Applicant Organization’s track record, stability, and financial health. In your response, discuss any concerns about the organization’s governance that could arise during the Foundation’s due diligence review of the organization and how the organization is addressing those concerns; such

concerns might include the organization's status in one of the databases listed above, financial challenges facing the organization, or a recent change in leadership.

Page 5. Narrative: Purpose of Grant (for Programmatic Support Requests)

An Applicant Organization that indicates in the first question on Page 3 that it seeks funding for **Programmatic Support** will be asked to respond to this set of questions. These questions pertain to the **specific program for which you seek funding**, rather than the organization generally. Use these questions to fully outline the details of the program – its goals, benefits, and implementation. An important point to remember is that the Foundation is looking to fund programs that **benefit the San Bruno community**. Your answers to these questions should focus on their relevance to **San Bruno**. The strongest proposals will sufficiently explain how the particular program will specifically benefit some segment of the San Bruno community, as opposed to San Mateo County, the Peninsula, the Bay Area, or Northern California generally. Short narrative answers of **no more than 250 words** are required for each question.

1. **Describe the proposed program.** Present a detailed description of the specific activities for which funding is being requested. This section asks for the goals and objectives of the program to be funded, as opposed to the Applicant Organization's overall goals and objectives. What does the Application Organization seek to accomplish with this program?
2. **Identify the needs, problems, and/or opportunities to be addressed, as well as the other organizations addressing this issue in San Bruno.** This is the place to highlight the Applicant Organization's understanding of the concern it is addressing through this specific program: Why is this issue important? What is the Applicant Organization's expertise in addressing the issue? How does the Applicant Organization's approach to the issue compared with the approach of other organizations addressing the issue? Describe the issue in as local a context as possible: What are the needs *in San Bruno*? How can this issue be best addressed *in San Bruno*?
3. **Identify the target population and geographic community to be served, the estimated number of people to be reached, how they will benefit and how you will reach them.** By including information on the population to be served, you provide a clear sense of the current beneficiaries of the proposed program. As appropriate, provide a quantitative explanation of the demographics of the population to be impacted by this program. If the target population extends beyond San Bruno, include information about the target population in San Bruno as well as the program's total target population. In terms of outreach, be specific about the types of communication and delivery methods you will use to connect with this population to serve it.
4. **Explain how the program contributes to and/or impacts the San Bruno community specifically, using both quantitative and qualitative measures when possible, and how you will measure the program's success.** Detail the program's contributions to San Bruno; quantify the results (e.g., number of individuals or families affected) as appropriate. Describe what successful outcomes for the program would look like and how the organization will determine if the program has achieved its intended outcomes.
5. **Explain how the program aligns with the SBCF Focus Area(s) selected on Page 3.** The Foundation focuses its funding on enhancing the quality of life in San Bruno, with an emphasis on enduring and long-term benefits, and has identified eleven priority areas for its activities. Make the case that the program falls within at least one of the focus areas listed on Page 3 of the Grant Application.
6. **Describe in detail how the Applicant Organization will be implement the program, including tasks or stages involved, which staff members or volunteers will be involved in carrying out each task or stage, and the general timeline for implementation of the program.** Explain the nuts and bolts of how the program will be carried out. What tasks or stages are involved? Who will be responsible for each task? Outline any key dates or chronology associated with accomplishing the program.
7. **If the program is a collaboration, identify the other organizations and/or partners participating in the program and their roles.** To the extent that the program involves other partners, describe those partners, the division of responsibilities, and how the partnership benefits and strengthens the program's effectiveness.

8. **If funding in addition to any SBCF grant awarded is necessary to implement the program, indicate where you will obtain the additional funding and whether the program can be implemented without such additional funding. List other funders and/or potential funders and dollar amounts committed or requested for the program.** Provide all other sources of funding needed to carry out the program and indicate whether such funding has already been committed.
9. **Describe how you will be able to implement this program without SBCF funding, if at all.** If the Applicant Organization does not receive funding from the Foundation, explain whether and how it will be able to carry out the program, either as it has been proposed or modified to accommodate a smaller budget.
10. **If the program will continue beyond the 2020 calendar year, describe its long-term funding sources. How will the program be sustained?** Community Grants typically provide funding for a grant period of one year. If applicable, explain how the program will continue to be implemented once SBCF funding sunsets. List future funding sources and whether they are already secured or anticipated.
11. **For past Community Grants Fund grantees only: If this program received a Community Grant from The San Bruno Community Foundation in any previous year, briefly describe how this year's proposal differs from the previously funded proposal.** Only organizations that received a Community Grant from the Foundation in a previous grant cycle are to answer this question. Explain any differences between the program seeking funding now and the previously funded program, including but not limited to the intended target population, method of implementation, staffing, timeline, additional sources of funding, and partnerships.

Page 6. Narrative: Purpose of Grant (for Capacity-Building Support Requests)

An Applicant Organization that indicates in the first question on Page 3 that it seeks **Capacity-Building Support** will be asked to respond to this set of questions. Use these questions to fully outline the organizational challenges the Applicant Organization faces and how the capacity-building effort for which it seeks funding will assist it in carrying out its mission more effectively. Short narrative answers of **no more than 250 words** are required for each question.

1. **Provide a brief overview of the strengths and major challenges facing the Applicant Organization at this time.** Provide context for the Applicant Organization's need for capacity-building. What are the Applicant Organization's greatest assets? Where does it need improvement? What internal and external challenges does it currently face?
2. **Describe the specific capacity issue or need to be addressed with this request. How was the issue identified?** Summarize the specific organizational challenge that will be addressed with the requested funding – for example, fund development, board or staff leadership, management capacity, public relations, or program development and evaluation. How did the Applicant Organization become concerned with this issue?
3. **Is the Applicant Organization currently working on this issue? If so, where is it in the process? Has it worked to address this issue previously? If so, what were the outcomes of these efforts?** Describe efforts the Applicant Organization is already taking to address this capacity issue. To what extent have they been successful? Where have they fallen short? How will SBCF funding complement or build upon these efforts?
4. **Please identify any current, past, and potential funders of this capacity-building project, the amounts received or requested, and the status of the request.** Detail other funding sources for the capacity-building effort for which the Applicant Organization now seeks SBCF funding.
5. **Describe the project plan. Include specific tasks and activities as well as the timeline.** Explain the nuts and bolts of how the capacity-building project will be carried out. What tasks or stages are involved? Outline any key dates or chronology associated with accomplishing the project.
6. **Identify key staff or board members who will be involved in the project. Briefly describe their roles and what skills and experiences they will bring to the project.** Who will staff the project? Who will be responsible for which tasks? What are the staff members' qualifications for leading and implementing this effort?

7. **Are there specific consultants or groups with whom the Applicant Organization will partner to address the identified capacity issue? What was the process and criteria for selection? If the project includes software, equipment, or other products, please describe the process and criteria for selection.** Identify consultants or partners participating in the capacity-building effort, and describe their roles and how they were selected. Similarly, list and provide the process for selecting any technology or equipment needed to carry out the project.
8. **What will be the key outcomes, including long-term impact, of this project? How will the project strengthen the Applicant Organization, enable it to deliver programs or services more effectively, and better achieve the Applicant Organization's mission? How does it further the goals in its strategic plan?** Detail how the project will benefit the Applicant Organization's organizational capacity and its ability to fulfill its mission. In addition, explain how the project, by strengthening the organization, will benefit San Bruno. Describe what successful outcomes for the project would look like and how the Applicant Organization will determine if the project has achieved its intended outcomes.
9. **Explain how the Applicant Organization aligns with the SBCF Focus Areas selected on Page 3.** The Foundation focuses its funding on enhancing the quality of life in San Bruno, with an emphasis on enduring and long-term benefits, and has identified eleven priority areas for its activities. Make the case that by strengthening the organization, the capacity-building effort falls within at least one of the focus areas listed on Page 3 of the Grant Application.
10. **For past Community Grants Fund grantees only: If this project received a Community Grant from The San Bruno Community Foundation in any previous year, briefly describe how this year's proposal differs from the previously funded proposal.** Only organizations that received a Community Grant from the Foundation in a previous grant cycle are to answer this question. Explain any differences between the capacity-building project seeking funding now and the previously funded project, including but not limited to the capacity issue being addressed, project plan, staffing, timeline, additional sources of funding, and partnerships.

Page 7. Supporting Documentation

This section requires Applicant Organizations to upload certain supporting documentation as part of the Grant Application. These supporting documents must be submitted by the September 25, 2019, deadline with the rest of the Grant Application. Except for #4 below, all supporting documents must be uploaded in PDF format.

The first set of supporting documents apply to all Applicant Organizations. The remaining items apply only to specific types of applicants, as noted below.

Please note that the Foundation is not requesting letters of support from an Applicant Organization as part of the Grant Application. If you have a letter of support you would like to offer, you may reference that it is available in the written narrative, but do not upload it with the Application.

ALL APPLICANTS:

1. **Marketing Collateral.** Provide any marketing materials highlighting the Applicant Organization's work, such as an annual report, brochure, newsletter, blog posts, or direct mail. Such materials help the Foundation better understand the Applicant Organization. The Foundation understands that some small Applicant Organizations may not have marketing material to provide.
2. **Applicant Organization's Financial Statements from the most recent fiscal year completed.** Provide the Applicant Organization's financial statements, including a statement of activities/income statement and balance sheet, from the last fiscal year. Audited financial statements, if available, are preferred.
3. **Applicant Organization's Budget for the fiscal year in which awarded grant funds would be used (expenses and income).** If a budget or draft budget is not yet available, provide the budget from the current fiscal year and describe any known variances expected in the coming year. This should be the budget for the *entire organization* (or, for very large organizations, the department that would implement the program) and must include both income and expenses.
4. **Completed Program Budget.** Download the Budget Template at <https://www.sbcf.org/grant-application-forms>, complete it, and upload the completed Excel spreadsheet here. This is the budget for the *specific program* for which

funding is sought and therefore is different from the organizational budget requested under #3. Please be sure to specify in the designated column on the spreadsheet the budget for the entire program versus the amount allocated specifically for the San Bruno portion of the program. You may edit the expenditure category titles as appropriate. The categories provided are examples of common program expenditure types.

501(C)(3) PUBLIC CHARITIES AND 501(C)(4), 501(C)(5), AND 501(C)(6) ORGANIZATIONS ONLY:

5. **Proof of Federal Tax-Exempt Status (such as IRS determination letter).** An IRS determination letter is the letter the IRS sends an organization after it has successfully applied for recognition of its tax-exempt status. In this letter, the IRS indicates under which section of the Internal Revenue Code the organization qualifies for tax-exempt status.

501(C)(4), 501(C)(5), AND 501(C)(6) ORGANIZATIONS ONLY:

6. **Completed IRS Form 990, Schedule A, Part III.** The IRS Form 990 is titled "Return of Organization Exempt From Income Tax." It is submitted by tax-exempt organizations and non-profit organizations (except congregations) to provide the IRS with annual financial information. As mentioned earlier, 501(c)(4), 501(c)(5), and 501(c)(6) organizations must meet the public support tests described in IRC 509(a)(2) to be eligible for SBCF funding. Such organizations must complete Form 990, Schedule A, Part III to demonstrate that they meet this requirement. Go to <https://www.irs.gov/pub/irs-pdf/f990sa.pdf> to download Form 990, Schedule A, and complete Part III if necessary. You must attach accounting records, such as previous years' financial statements, to substantiate the figures used to complete IRS Form 990, Schedule A, Part III. You may wish to seek assistance from a certified public accounting firm experienced in nonprofit tax preparation services

Please note: Other organizations do **not** have to provide a completed Form 990 as a supporting document.

2018-2019 COMMUNITY GRANTS FUND GRANTEES ONLY:

7. **Grant Report or Status Report for 2018-2019 Community Grants Fund Award.** Applicant Organizations that received a Community Grant in 2018-2019 must provide an update on that grant by submitting either a Grant Report (completed if all funds have been expended) or a Status Report (completed if all grant funds have not been fully expended). Please select one option below and upload document if applicable:
 - o The organization already submitted its Grant Report to The San Bruno Community Foundation for its 2018-2019 Community Grant.
 - o The organization is submitting its **Grant Report** for its 2018-2019 Community Grant to The San Bruno Community Foundation with this application for a 2019-2020 Community Grant.
 - o The organization is submitting a **Status Report** on its 2018-2019 Community Grant with this application for a 2019-2020 Community Grant.

To access the Grant and Status Report Forms to be completed with this application (if applicable), please go to this link: <https://www.sbcf.org/cgf-report-forms>. Note that a Statement of Revenues and Expenditures must be included as part of the Grant Report. Once either the Grant Report or the Status Report is completed, save it as a PDF and upload it.

2018-2019 Community Grants Fund grantees with questions about this requirement should contact Foundation staff at grants@sbcf.org.

Page 8. Signature Page

To be considered for a Community Grant, an individual who is authorized to submit the Application on behalf of the applicant must hand sign the Signature Page, which must be scanned (in PDF format) and uploaded as part of the Application. Digital signatures are not accepted. You may download the Signature Page at <https://www.sbcf.org/grant-application-forms>.

Page 9. Submitting Your Application

On Page 9, you will have the opportunity to click on the "Preview" button to see your entire Grant Application submission. Before hitting "Confirm," review your responses and make any necessary changes. If you would like to print out a copy of

your Application, please do so from the preview screen. You must click on “Confirm” to submit your Grant Application. Once you hit the “Confirm” button, you have submitted your Grant Application and will not be able to edit it. You will receive a screen message when the Application Form has been successfully submitted.

D. For More Information

The Foundation has scheduled two ***Grant Workshops***, which will provide an overview of the Community Grants Fund and how to apply for a Community Grant. Potential Applicant Organization representatives are encouraged to attend one of the Grant Workshops, which will be held on Tuesday, August 20, and Monday, September 9, from 6:00-7:00 p.m. at San Bruno City Hall, Room 115, 567 El Camino Real, San Bruno.

You may also want to review the portion of the Foundation’s website, www.sbcf.org, pertaining to the Community Grants Fund. Any updates related to the application process will be posted there.

If you have any other questions about the Community Grants Fund and/or the Grant Application, please contact the Foundation at grants@sbcf.org.

7/1/2019