

SAN BRUNO

Community Foundation

2019 COMMUNITY GRANTS FUND REVIEW AND RATINGS INSTRUCTIONS

You are to rate each application assigned to you on a scale of 5 (highest) to 1 (lowest) for each criterion as well as an overall score. All scores should be **whole numbers** (e.g., no 2.5 or 3.7).

A. Criteria

We have established five primary criteria for evaluating applications. The following chart and explanations are to guide your ratings of each criteria:

- 5 = Exceptional – top 10% of applications, clearly meets the criteria
- 4 = Strong – top 25% of applications
- 3 = Good/OK – around the 50th percentile, generally meets the criteria
- 2 = Below Average – definitely in the bottom half of applications
- 1 = Minimal/None – bottom 10% or does not meet the criteria

The five criteria are as follows:

- 1. The benefits of the proposed program to the San Bruno community:** It is critically important that all grant awards go to programs *that have meaningful benefit to the San Bruno community specifically*. We emphasized this over and over again (in our written materials and at the grant workshops) as the most important criterion. Applicant Organizations need to make the case that the proposed program addresses a need *in San Bruno* and that the grant funding would specifically benefit San Bruno.

Key questions to consider include: Has the Applicant Organization made the case that there is a need for this program specifically in San Bruno? Are other organizations already meeting this need? What is the target population in San Bruno that would be served by the program? How does the program contribute to and/or impact the San Bruno community? Is the Applicant Organization able to quantify the community benefit (e.g., how many people in San Bruno will benefit)? For those program with a footprint greater than just San Bruno, does the Applicant Organization explain how the funds will specifically benefit the San Bruno community (e.g., do we know that the funds will go specifically toward serving San Bruno residents vs. other program beneficiaries)? Narrative questions 5-7 should address this criterion.

Proposals scoring high on this criterion will clearly articulate the need *in San Bruno specifically* and the ways in which San Bruno will benefit. Weaker proposals regarding this criterion may identify a need in San Mateo County generally but fail to discuss the need in San Bruno specifically (e.g., identify need for veterans' mental health services in San Mateo County generally but not in San Bruno specifically). Weaker proposals may also fail to tailor the use of the funds to the San Bruno community's benefit (e.g., asking for funding to support a program's services that are offered throughout San Mateo County, but only a small portion of the funds would be used to benefit San Bruno directly or it's not clear that a significant portion of the funds would be used to benefit San Bruno).

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Please note: There is no requirement that Applicant Organizations must be physically located in San Bruno or that the delivery of services to the San Bruno community physically take place within San Bruno's borders. For example, a nonprofit based in Burlingame could seek funding for a program that it runs out of its Burlingame facility, so long as it makes a sufficient case that the program is open to San Bruno residents, it meets a need in San Bruno, and the funds being sought are tied to the benefit of the San Bruno community.

2. **The proposal's alignment with one or more of the Foundation's focus areas:** The Foundation Board took the results of the Foundation's extensive 2015 Community Listening Campaign to identify 11 focus areas for the Foundation's work. It is imperative that grant awards go to support programs that fall within one or more of these focus areas. Narrative question 8 gave Applicant Organizations the opportunity to make the case, in the event that it is not self-evident, that their proposal clearly falls within one or more of the focus areas.
3. **Program methodology and budget:** In your assessment, would the proposed program satisfactorily meet the needs that it aims to address? Has the Applicant Organization articulated a well thought-out plan of action that can be effectively accomplished given its staffing, resources, expertise, and bandwidth? Does the program budget reflect a realistic estimate of the necessary expenses to carry out the proposal?

In addition, is the program supported by several sources of funding? We believe that it is important for an organization to have "skin in the game," so to speak, and we do not want an organization to become completely dependent on the Foundation for the program to continue beyond 2020. It may be reasonable for the Foundation to provide most (or possibly even all) of the funds for a proposal in the first year if the Applicant Organization has clearly articulated a plan to develop other long-term funding sources.

4. **Requested grant amount in relation to the anticipated community benefit:** Applicant Organizations were able to request grant funding up to \$25,000. Many Applicant Organizations asked for the full amount – some, perhaps, because they could. Is the requested grant amount proportional to the anticipated community benefit? For example, a proposal that benefits 10 students (that is, a relatively small number of people) might be deemed worthy of a \$5,000 grant, but the community benefit may not justify a substantially larger grant. Also, please consider quantitative (how many people will directly be affected by the proposal?) as well as qualitative (including secondary community benefits) measures of community benefit.
5. **Organizational track record, stability, and financial health:** Some proposals have been submitted by large, established organizations with large paid staffs, and others come from small, grassroots, volunteer-based community organizations. While the Foundation is very interested in supporting different types of organizations, it also has a fiduciary responsibility to ensure that all grantees are sufficiently equipped to properly administer grant awards. Does the Applicant Organization appear to have the staffing (whether volunteer or paid) to carry out its proposed program? Does the Applicant Organization appear to have the administrative and financial structures in place to ensure that grant funds would be used for

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their intended purposes? How long has the Applicant Organization been in existence? How long has it been running the program for which it seeks funding? Does the Applicant Organization appear to be financially healthy? Has it recently experienced significant changes in leadership and staffing? Do you have any concerns about the Applicant Organization's stability, ability to carry out the intended program, and prospects for long-term success?

B. Overall Score

The overall score should be your overall rating for a particular application. *The most important criterion is benefit to the San Bruno community, which should be weighted about 33% of the overall score. The four remaining criteria (alignment with a focus area, program methodology and budget, requested amount in relation to community benefit, and organization's track record, stability, and financial health) should generally be weighed equally for the remaining 67% (about 17% each).*

At the same time, the overall score should **NOT** necessarily be a mathematical calculation of the five criteria scores. **You may decide that an exceptional strength in one area merits a bump up in the overall score, or a serious deficiency in one area outweighs strengths in other areas.**

PLEASE NOTE: The one area where applications cannot score on the low side and still receive an overall score of 4 or 5 is "benefits to the San Bruno community." ***Given the origins of the Foundation's funds, all grant recipients must demonstrate meaningful community benefit in San Bruno specifically.***

Please use the following guidelines when assigning an application's Overall Score:

- 5 = Exceptional – we'd be crazy not to give this organization a grant!**
- 4 = Strong – very competitive; should seriously be considered for a grant
- 3 = Good/OK – meets the basic requirements and has no serious weaknesses
- 2 = Below Average – has serious weaknesses in at least one criterion
- 1 = Not Qualified – should not be in consideration for a grant

We realize that some of you will likely be "harder" graders than others, and that's fine. That's why we have multiple readers review each application. At the same time, we don't want applications disadvantaged by a particularly harsh grader or advantaged by an overly generous one, so we do ask you to be mindful of distributing your scores to distinguish between stronger and weaker applications. In other words, it's not as helpful if you give half of the applications you read a 5, or if you give none or maybe one a 5. Try to distribute your scores using the full range of options.

In addition, keep in mind that in each of the past two years, we have awarded \$300,000 – funding 23 different programs in 2017-2018 and 25 in 2018-2019. Although it will depend on the Review Panel's assessment of this year's applicant pool, let's assume that we fund 20-25 programs this year. Each panelist will read about 30% of the application pool (14-15 out of 50). If you also read 30% of the eventual grant winners, on average six to eight of the applications you read will be funded.

The Review Form will allow you to write down any follow-up questions you have about the particular Applicant Organization. As noted above, the quality of the proposals varies greatly, and after reading

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some proposals, you may have additional questions you would like answered before being able to support funding. For example, you may feel that an Applicant Organization has sufficiently identified a community need, but you aren't sure that the proposed program is justified by the program budget. Or you may have concerns about funding all parts of a proposal and be more comfortable advocating for partial funding. (Remember that the program guidelines explicitly state that the Foundation has the discretion to fund proposals at less than the requested amount, and, in fact, in past years we have funded a large number of proposals at less than the requested amount.) Please include these types of follow-up questions and concerns in the "Follow-up Questions" box.

C. Consideration of Past Community Grants Fund Grantees

Through the Community Grants Fund, the Foundation funded 14 projects in 2016-2017, 23 projects in 2017-2018, and 25 projects in 2018-2019. Nearly half of the Applicant Organizations are previous grantees. Some have reached their third year of funding for one specific program (the limit for consecutive years of funding under the program guidelines) and are now applying in their fourth year for a different program. In the final narrative question, past grantees are asked to describe how this year's proposal differs from the previously funded proposal. Also, as mentioned earlier, these Applicant Organizations were required to provide, in addition to the rest of their applications, the formal Grant Report that they are required to submit after the grant funds have been expended or, if they are not yet ready to submit the Grant Report (the funding period does not conclude until December 31, 2019), a Status Report.

The Grant and Status Reports provide confirmation that the funding was used for the grant purpose specified, details on the accomplishments/challenges of carrying out the funding goals, and publicity materials acknowledging the Foundation. All Grant Reports for 2018-2019 grantees include a statement of revenues and expenditures associated with the grant purposes (in 2016-2017 and 2017-2018, grantees awarded grants under \$10,000 were not required to provide a statement of revenues and expenditures with their Grant Reports). For grantees providing a Status Report on a 2018-2019 grant, please do not "ding" them for not having spent the entire grant amount yet. Grantees are given the entire calendar year to expend their funds, so they have until December 31, 2019, to do so.

Previous grantees have no guarantee of receiving another year of funding, and you should give no preference toward funding a repeat grantee just because it was funded last year. At the same time, you should not give a lower score because the Applicant Organization received SBCF funding last year. You are to evaluate each application in the context of *this year's* grant application pool. The Grant Reports of all programs funded or Status Reports for current programs will provide you with information about the Applicant Organization's effectiveness in administering previous grants, which you can use in your evaluation of the current grant application.

As mentioned earlier, we are providing a spreadsheet that indicates if and when Applicant Organizations have applied for and received a Community Grant in a prior year, so that you can see their past history with the program. This includes Applicant Organizations that applied for – but did not receive – Community Grants Fund funding in any past year.

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D. Partial Funding

The Foundation would like to provide grants to a diverse array of meritorious applications. This means we will likely be looking to fund some proposals at less than the requested amount, so your thoughts on which applications would be good candidates for partial funding are important.

VI. Review Form

You will submit all ratings of the applications through an online Review Form (example is in Appendix B). As mentioned above, at the top of each application PDF there is a link called “Review This Application.” When you click on this link, you will be taken to the online form for the particular application. The Applicant Organization’s name and the program name are automatically populated at the top of the form. You will need to fill out the “Reviewer” section with your first and last name as well as your email address.

You must provide a rating score for each of the five criteria as well as an overall score for each application you have been assigned to rate. There will also be a “Notes” field next to each score where you can jot down any thoughts you think are important in explaining your rating and will help refresh your memory during the Panel’s deliberations. And, as mentioned above, we encourage you to use the “Follow-Up Questions” box on the form to write down additional questions, concerns, or ideas about partial funding.

Moreover, because you may want to review some or all of your assigned applications before inputting them into the online form, we are providing a spreadsheet that you can use for your own offline notes. You will **NOT** submit this spreadsheet (all ratings must be submitted in the online Review Forms), but you might find this helpful for jotting your notes with pen and paper as you go along. Included is a box to check off when you have submitted the Review Form to avoid duplicated submissions. Use of the spreadsheet is optional. **All rating scores must be submitted online.** Once you submit the online Review Form, you will receive a confirmation email with your scores for that application.

VII. Your Top Five List

New This Year: We ask you to identify the top five applications that you believe SBCF should fund. After you have read your entire set of assigned applications, take a minute to reflect on the whole set and pick the five you feel most strongly about funding. There is also a column on the spreadsheet to mark your top five. At the conclusion of submitting all of your ratings, **we ask you to send Stephanie (grants@sbcf.org) an email titled “Top 5” and list by name your top five list** (organization name is fine, but for those organizations that submitted more than one application, indicate which program as well).

VIII. Review Deadline

Please complete all assigned online ratings in each application Review Form and email Stephanie your Top 5 List (grants@sbcf.org) no later than 5:00 p.m. on Friday, November 1, 2019.

Any questions? Don’t hesitate to call or email us. Thank you again for your service on the Review Panel!