SAN BRUNO
Community Foundation

Community Grants Fund
Sample Grant Application (2020-2021)

Thank you for your interest in The San Bruno Community Foundation's 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. Such programs may include, but are not limited to, racial equity and social justice programs as well as programs addressing community needs related to COVID-19.

All portions of the Grant Application must be submitted by 5:00 p.m. on Wednesday, September 30, 2020. Failure to provide a complete Grant Application by the deadline will result in your Grant Application not receiving consideration.

GRANT APPLICATION CHECKLIST

A complete Grant Application includes:

1. **Executive Summary** – Complete the form regarding Applicant Organization and Community Grant Proposal

2. **Narrative** – Respond to questions (250-word limit for each response) regarding:

    a. **Applicant Organizational Information** – All Applicant Organizations to complete

    b. **Purpose of Grant** – Separate forms for program proposals and capacity-building proposals

3. **Supporting Documentation** – Applicant Organization to upload in **PDF format**, except as noted

    a. **Marketing Collateral** highlighting the Applicant Organization's work, such as an annual report, brochure, newsletter, blog posts, or direct mail (if available)

    b. **Applicant Organization's Financial Statements** from the most recent fiscal year completed (audited if available)

    c. **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.

    d. **Completed Program Budget.** Download the Budget Template at https://www.sbcf.org/grant-application-forms. Upload the completed budget in Excel spreadsheet format.

    e. **Signature Page**. Download the Signature Page at https://www.sbcf.org/grant-application-forms. Upload the signed form in PDF format. A scanned copy of the hand-signed form is required. Digital signatures are not accepted.

    f. *For 501(c)(3) public charities and 501(c)(4), 501(c)(5), and 501(c)(6) organizations:* **Proof of Federal Tax-Exempt Status** (such as copy of IRS determination letter)

    g. *For 501(c)(4), 501(c)(5), and 501(c)(6) organizations:* **Completed IRS Form 990, Schedule A, Part III and related documentation** to demonstrate that the Applicant Organization satisfies the public support test of Internal Revenue Code Section 509(a)(2). You can download Schedule A from the IRS website at https://www.irs.gov/pub/irs-pdf/f990sa.pdf. 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.

    h. *For 2019-2020 Grantees:* Grant Report or Status Report for 2019-2020 Community Grants Fund award. Download the form at https://www.sbcf.org/cgf-report-forms.

Additional Information

Please note that as part of its due diligence review process, the Foundation will check each Applicant Organization's status on the following government databases:

- **Internal Revenue Service's Tax Exempt Organization Search** (to check an Applicant Organization's eligibility to receive tax-exempt charitable donations (generally only a 501(c)(3))
- **California Secretary of State's Business Search** (to check whether properly formed corporations and LLCs are listed as "active")
- **California Franchise Tax Board's Entity Status Check** (to check if an Applicant Organization is exempt from California franchise taxes)
- **California Attorney General's Registry of Charitable Trusts Verification Search** (to check if an Applicant Organization is registered and if its status is "current")

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 Applicant Organizations, 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 questions regarding its required registration with any of these four government databases, it should contact the relevant entities and/or confer with appropriate legal counsel.

Finally, please review the Application Guide at https://www.sbcf.org/grant-application for definitions, explanations, and additional guidance in completing the Community Grants Fund Application. Applicant Organizations using a fiscal sponsor must contact Foundation staff at grants@sbcf.org for specific instructions on filling out this Application.

EXECUTIVE SUMMARY:
APPLICANT ORGANIZATION

Legal Name of Applicant Organization: *

Fictitious Business Name (if applicable):

Is Application Organization serving as a fiscal sponsor for the program seeking funding?
◯ Yes   ◯ No
Note: If the Applicant Organization is serving as a fiscal sponsor for the program seeking funding, you must contact Program Consultant Stephanie Rutgers at grants@sbcf.org for detailed guidance on completing this Application.

Website:

Tax Identification Number:

Corporate or Organization Number (if applicable):

Applicant Organization's Tax Status (select one): *
◯ 501(c)(3)* public charity
◯ 501(c)(4) that meets the public support tests described in 509(a)(2)
◯ 501(c)(5) that meets the public support tests described in 509(a)(2)
◯ 501(c)(6) that meets the public support tests described in 509(a)(2)
◯ Governmental unit described in 170(b)(1)(A)

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

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 prior to completing the Application.

Contact Person for this Grant Application:

First Name: *   Last Name: *

Title: Email: *

Phone Number:

Executive Director or equivalent (if not the Contact Person):

First Name: _____   Last Name: _____

Title: _____   Email: _____

Address: _____   City: _____

State: _____   Zip Code: _____

Phone Number: _____

Year Founded: _____

Geographic Area Served: _____

Please list the Applicant Organization's Board of Directors and officers (or equivalent), with titles: [   ]

Does the Applicant Organization have employees?
○ No, entirely volunteer-run
○ Yes, # Full-time: _____ # Part-time: _____

SBCF is unable to fund certain types of organizations. Please indicate whether Applicant Organization falls into one of the following categories of organizations and therefore is ineligible for SBCF funding:
○ A Section 509(a)(3) supporting organization (a charity that carries out its exempt purposes under the Internal Revenue Code by supporting other exempt organizations)
○ A Section 509(a)(4) organization that is organized and operated exclusively for testing for public safety
○ A political organization
○ An organization that SBCF is prohibited by law from funding with public funds, such as a religious institution or 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
○ None of the above

Has the Applicant Organization ever received a Community Grant from The San Bruno Community Foundation?
○ Yes   ○ No
    In which grant funding cycle? Check all that apply:
    ○ 2016-17   ○ 2017-18   ○ 2018-19   ○ 2019-20

    Is the Applicant Organization now applying for funding for a program that was previously funded or a different program?
    ○ Same program   ○ Different program

    For 2019-20 Grantees: As a result of circumstances arising from the COVID-19 pandemic, did SBCF provide Applicant Organization with an extension of the grant period or other amendment to the grant agreement?
    ○ SBCF approved an extension of the grant period.
       [If so,] What is the amended end date for the grant period? (MM/DD/YYYY) _____
       [If so,] If Applicant Organization is seeking funding for the same program that was funded in 2019-2020 and received an extension of the grant period beyond December 31, 2020, clarify how both sets of funding (the 2019-2020 grant and the 2020-2021 grant being sought now) would be utilized in 2021. [   ]

    ○ SBCF approved other amendments to the grant agreement.
       [If so,] What are the amendments? [   ]

    ○ The grant agreement for the 2019-20 grant has not been amended.

EXECUTIVE SUMMARY:
COMMUNITY GRANT PROPOSAL

Type of Community Grant Requested (select one): *

◯ 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) – Applicant Organizations applying for Capacity-Building Support are required to contact SBCF at grants@sbcf.org prior to completing this Application.

SBCF generally does not fund certain types of activities. Please indicate whether the requested grant is intended to fund one of the following categories of activities and therefore is ineligible for SBCF funding:

◯ An existing deficit
◯ A direct contribution to restricted endowments
◯ Lobbying or political activity
◯ Religious activity that government agencies are legally prohibited from funding
◯ None of the above

SBCF Focus Area(s) Being Addressed by this Request (check all that apply):

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

Program Name: * _____

Purpose of Grant (one sentence): _____

Beginning and Ending Program Dates: Beginning:_____   Ending:_____
(Month and Year)

Amount Requested (not to exceed $25,000): $_____ (No decimals or commas)

Total Program Cost: $_____ (No decimals or commas)

San Bruno Portion of Program Cost: $_____ (No decimals or commas)
(Please provide dollar amount, not a percentage of the total cost)

Applicant Organization's Annual Budget: $_____ (No decimals or commas)

Is this a new program?
◯ Yes   ◯ No

Is this a collaboration with other organizations?
◯ Yes   ◯ No
   If yes, list the other organizations involved: _____

NARRATIVE: ORGANIZATIONAL INFORMATION
All Applicant Organizations to Complete

Please provide short answers (no more than 250 words each) to the following questions:

1. Briefly describe the Applicant Organization's history, mission, and goals.

2. Briefly describe the Applicant Organization's current activities, recent accomplishments, and future plans.

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](#))**.** You may also include an explanation of how the COVID-19 pandemic has impacted the Applicant Organization, operationally, financially, and programmatically.

NARRATIVE: PURPOSE OF GRANT
For Programmatic Support Requests

Please provide short answers (no more than 250 words each) to the following questions:

1. Describe the proposed program. Present a detailed description of the specific activities for which funding is being requested, including program goals and objectives.

2. Identify the needs, problems, and/or opportunities to be addressed, as well as the other organizations addressing this issue 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 you reach them.

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.

5. Explain how the program aligns with the SBCF Focus Areas selected on Page 3.

6. Describe in detail how the Applicant Organization will 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. If applicable, include alternative plans in the event that COVID-19 shelter-in-place and social distancing restrictions that may be imposed or heightened during 2021 affect your implementation plans.

7. If the program is a collaboration, identify the other organizations and/or partners participating in the program and their roles.

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 amounts committed or requested for the program.

9. Describe how you will be able to implement this program without SBCF funding, if at all.

10. If the program will continue beyond the 2021 calendar year, describe its long-term funding sources. How will the program be sustained?

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.

NARRATIVE: PURPOSE OF GRANT
For Capacity-Building Support Requests

Please provide short answers (no more than 250 words each) to the following questions:

1. Provide a brief overview of the strengths and major challenges facing the Applicant Organization at this time.

2. Describe the specific capacity issue to be addressed with this request. How was the issue identified?

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?

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.

5. Describe the project plan. Explain how the capacity-building project would be implemented and include specific tasks and activities as well as the timeline.

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.

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.

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?

9. How will addressing this capacity issue bolster Applicant Organization's ability to serve the San Bruno community? What program(s) of Application Organization that contribute to the San Bruno community would benefit if this request for capacity-building support were approved?

10. Explain how the Applicant Organization aligns with the SBCF Focus Area(s) selected on Page 3.

11. ***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.

SUPPORTING DOCUMENTATION

We request that you upload the following documentation as part of your Grant Application. These supporting documents must be submitted prior to the September 30, 2020, Application deadline.

Except for #4 below, you must upload the requested documents in PDF format.

ALL APPLICANTS:

1. **Marketing Collateral** highlighting the Applicant Organization's work, such as an annual report, brochure, newsletter, blog posts, or direct mail (if available)

2. **Applicant Organization's Financial Statements from the most recent fiscal year completed (audited if available)**

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.

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. *Please be sure to include on the spreadsheet the budget allocated specifically for San Bruno.*

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

5. **Proof of Federal Tax-Exempt Status** (such as copy of IRS determination letter)

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

6. **Completed IRS Form 990, Schedule A, Part III and related documentation to demonstrate that the organization satisfies the public support test of Internal Revenue Code Section 509(a)(2).** You can download Schedule A from the IRS website at https://www.irs.gov/pub/irs-pdf/f990sa.pdf. 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.

2019-2020 COMMUNITY GRANTS FUND GRANTEES:

7. **Grant Report or Status Report for 2019-2020 Community Grants Fund Award.** Applicant Organizations that received a Community Grant in 2019-2020 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 yet been fully expended). If applicable, explain in the Grant Report or Status Report how the Organization's ability to use the grant funds was affected by the COVID-19 pandemic. Please select one option below and upload document if applicable:
    ○ The Applicant Organization already submitted its **Grant Report** to The San Bruno Community Foundation for its 2019-2020 Community Grant.
    ○ The Applicant Organization is submitting its **Grant Report** for its 2019-2020 Community Grant to The San Bruno Community Foundation with this Application for a 2020-2021 Community Grant.
    ○ The Applicant Organization is submitting a **Status Report** on its 2019-2020 Community Grant with this Application for a 2020-2021 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. *Once the form is completed, save it as a PDF, and upload it.*

The San Bruno Community Foundation reserves the right to request a paper copy of the uploaded documents, particularly if necessary to verify the information you have provided in this Application.

SIGNATURE PAGE

If you have not done so already, please download the Signature Page at https://www.sbcf.org/grant-application-forms. You must hand sign the form and upload it below. Digital signatures are not accepted.

The Signature Page certifies that:

1. The signer has full authority to sign this Application on behalf of Applicant Organization.

2. All of the information provided to The San Bruno Community Foundation in Applicant Organization's Grant Application, including all supporting documentation, is true, correct, and complete, and there are no material omissions from the Grant Application.

3. If any information contained in the Grant Application is not true, complete, and accurate, or if material information has been omitted, Applicant Organization understands that it could be disqualified from receiving, and/or forfeit or be required to return, any Community Grant that it receives from the Foundation.

4. All decisions by the Foundation regarding grant awards, including through its Community Grants Fund, are made in the sole discretion of the Foundation, and all decisions of the Foundation are final.

5. The signer acknowledges that successful Applicant Organizations will be required to sign a separate Grant Agreement, and agree to the terms thereof, prior to disbursement of a grant award.

Applicant Organizations that submit Applications without completing the Signature Page will be disqualified from consideration for the Community Grants Fund. You must upload the hand-signed Signature Page in PDF format.

The San Bruno Community Foundation reserves the right to request a paper copy of your signed Signature Page, particularly if necessary to verify the information you have provided in this Application.

FINAL STEP: SUBMITTING YOUR APPLICATION

Have you completed all sections of the Online Application?

To preview your completed Online Application before submitting it, please click "Preview" button below. If you would like to print out a copy of this Application, please do so from the preview screen.

You must hit the "CONFIRM" button on the next screen to officially submit your Application Form. Failure to do so will result in an incomplete Application Packet, and you will not be considered for a Community Grants Fund award. Note: Once you click "CONFIRM," you cannot return to the Application.

By clicking on the "CONFIRM" button, I confirm that the Application Form is complete.

You will receive a screen message confirming the Application submission as well as an emailed copy of the Application for your records. If you have any questions, please visit www.sbcf.org or email grants@sbcf.org.

6/30/20