

Organizational Development 2024

Community Foundation for Monterey County

Grantwriting Tips and Instructions

Organizational Development grants are meant to support organizations and leaders to be stronger, more resilient and equitable. Grants can help your organization make progress in addressing unique, non-recurring management and leadership situations.

- Review the Guidelines to ensure that your organization and project are eligible. Conversations with CFMC staff, in advance of grant application submission, are encouraged.
- While there are many possible activities that could help move an organization forward, CFMC prioritizes focused, strategic projects.
- Decisions are typically made within two months of receipt of a complete proposal.

Compelling proposals:

- Demonstrate a vision for organizational growth.
- Clearly describe what will be different about the organization as a result of the capacity building project and how success will be measured.
- Include realistic budgets that demonstrate comprehensive support for the project's success.
- Detail a plan that makes sense with the necessary financial and human resources for implementation.
- Have leaders who take an active role and are guided by assessment, feedback, learning and improvement.

1. Be clear and concise in your responses.
2. If you need to leave this form and return later, scroll to the bottom of the page and click "Save Application" before logging out.
3. Have someone review your document to ensure clarity. If they have questions, so will our reviewers.
4. Watch character count limits on the narrative response questions. The character counter is below each narrative box and the total count **INCLUDES SPACES**.
5. The character counts are **maximum limits**. You are not required to use all the space.
6. You may download a printer-friendly PDF of your application by clicking the "Application Packet" link at the top of this page.

For technical inquiries, call 831.754.5880 or email grants@cfmco.org.

For all other inquiries including fiscally sponsored groups, please contact Susie Polnaszek at susiep@cfmco.org or 831.375.9712 x138.

File Upload Instructions

For questions that require an uploaded document, please follow these steps.

1. Create or identify a document on your computer that addresses the request. Include the name of your organization on all documents and in the name of each document you upload. USE WORD, EXCEL OR PDF FORMATS ONLY.

2. Return to the appropriate question of your online application. Click on the "upload a file" button. Locate the document on your computer. Click "Open".

3. Your file will begin uploading; you may see a progress indicator. (Note: You no longer have to click "Save" at the bottom of the page to upload files.) When the upload is complete, the file's name will appear as a blue link under the corresponding "upload a file" button. We recommend that you click this link to check the file. The red "X" on the right allows you to delete the file (it does not indicate an error.) Note file size limits for each document.

Grant Request

These questions are an opportunity to describe the What, Why, and How of your Organizational Development project. Please read through all the questions before answering.

Project Name*

Provide a brief one-line phrase to describe this request. This phrase serves as the title of your request in our records. Examples include "facilitated board retreat to develop a three-year plan for..." or "executive coaching and development of a multi-year fund development plan".

Character Limit: 150

Requested Amount*

Use "5,000" format. Grants are expected to range from \$5,000 to \$10,000.

Character Limit: 20

Total Budget for Organizational Development Project*

Character Limit: 20

Briefly describe your project*

What activities will be done and by whom? What is the project timeline, and what expenses will the grant fund? What will be different about your organization as a result? If working with a consultant or vendor, upload a copy of the proposal, Scope of Work in the Attachment section of the application.

Character Limit: 3000

Why is this project important now?*

Character Limit: 3000

What support do you have to be successful with the project?*

Is this the first time your organization has addressed this area of need, or have you undertaken similar capacity building projects in the past? If so, what were the impacts and lessons learned? Briefly describe other activities your organization will undertake to support the goals of this Organizational Development project, if any. How will you pay for future costs or related activities?

Character Limit: 3000

Organization

Will this grant be managed by a nonprofit fiscal sponsor?*

501(c)3 nonprofit fiscal sponsors serve as the grant applicant on behalf of a group which does not have its nonprofit status recognized by the IRS. Fiscal sponsors agree to be responsible for managing grant funds and reporting requirements.

If your group is not an incorporated nonprofit organization, please speak with Susie Polnaszek before submitting this application, 831.375.9712 x138.

Choices

No

Yes

Fiscally-Sponsored Groups

What is the mission of the fiscally-sponsored group?

Character Limit: 1000

What is the legal name of the nonprofit fiscal sponsor?

Character Limit: 250

Fiscal Sponsor Tax Exemption

What is your nonprofit fiscal sponsor's tax exempt number or employer identification number (issued by the IRS)?

Character Limit: 20

Annual Budget (of the sponsored group)

Upload a detailed budget (for the year reflected in the grant request) including both income and expenses.

File Size Limit: 2 MB

Leadership

List the names of the advisory members (of the sponsored group) and/or the leaders responsible for implementing the proposed activities. Include their city of residence and profession/expertise.

Character Limit: 1000

Memorandum of Agreement

Upload a signed memorandum of agreement with the sponsored group or collaborating organizations verifying the terms of the arrangement and signed by all parties.

File Size Limit: 2 MB

Name of Executive Director or Other Authorized Representative of Fiscal Sponsor

Nonprofit fiscal sponsors agree to be accountable to the Community Foundation for the management and reporting of expenses related to this grant. IF a grant is approved, I agree to be responsible for maintaining financial records and any requested expense reports and information.

Character Limit: 100

The following Organization questions apply to the nonprofit fiscal sponsor.

Organization Information

The questions in this section refer to the OVERALL 501(c)3 nonprofit organization, NOT only this request.

Organization's Mission Statement*

Character Limit: 1000

Year Organization was Established*

Character Limit: 4

Number of Paid Employees

For this and the next question, answer if this is your first grant request to CFMC or if there have been any changes since submitting your last grant request to CFMC.

Character Limit: 10

Number of Active Volunteers

Character Limit: 10

Board of Directors*

List all current board members with city of residence and profession/expertise.

Character Limit: 3000

Financial Information and Attachments

Organizational Development Project Budget*

Upload a budget for this request. You are not required to use our template; however, it is helpful to include the organization's financial and in-kind commitment to the project. Staff wages/salaries may be a part of the overall project budget and may be considered eligible if directly related to the organizational development project for this grant proposal.

File Size Limit: 2 MB

Consultant's Proposal or Vendor Cost Estimates*

Upload a the consultant's proposal, outlining the expected costs and services if funds in this request would be used for a consultant. If purchasing equipment valued for \$100+, upload a vendor's quote, product price sheet or a scope of work.

File Size Limit: 2 MB

Organizational Budget*

Upload your organization's current annual budget (for the year reflected in the grant request) showing both income and expenses. If this request is for a fiscally-sponsored group, this and the following two questions refer to the sponsoring 501(c)3 nonprofit organization.

File Size Limit: 2 MB

Balance Sheet or Statement of Financial Position*

Upload a balance sheet for the most recently completed year. This financial statement lists the organization's assets and liabilities by category at a specific point in time. Examples of asset lines are cash, accounts receivable, prepaid expenses, property and equipment. Examples of liability lines are accounts payable, salaries and wages, accrued vacation, plus equity/real estate, vehicle and long-term debt, etc.

File Size Limit: 2 MB

Profit & Loss Statement or Statement of Activities*

Upload a profit and loss statement for the most recently completed year. This financial statement lists income and expenses by categories. Examples of income are grants, individual donations, earned revenue and events. Examples of expense lines are salaries and wages, payroll taxes, insurance, contract services, occupancy/utilities/rent and vehicle operation/maintenance.

File Size Limit: 2 MB

Organization Agreement

Prior to submitting this grant application, one of our representatives contacted a CNE staff member about the eligibility and fit of this grant request.

We, the undersigned, certify that the practices of this organization conform to the non-discrimination policy as follows. This organization does not discriminate in its employment practices, volunteer opportunities or delivery of programs on the basis of race, religion, gender, national origin, age, disability, veteran status, marital status, sexual orientation, or any other characteristic protected by law.

We, the undersigned, hereby state that the information presented in this application is complete and factual. By typing our names below and submitting this application, we confirm our authority and have notified and secured approval from all parties. We hereby agree that funds, if granted, will be used only for the purpose described above unless written approval from the Community Foundation for Monterey County is received.

GRANT AGREEMENT

A grant from the Community Foundation for Monterey County (CFMC) is to be used only for the purposes described herein and is subject to the grantee's acceptance of the conditions specified below. Reviewing the grant agreement now will expedite payment IF a grant is approved.

Grant Period: 12-month grant

Final Report Due: 12 months after the grant period begins

Purpose and Use of Funds: Grant funds must be spent within **12 months** of the grant date and for the purposes stated in the grant proposal and specified above. Grant funds may not be used for any expenses incurred prior to the grant date. If something unexpected occurs or additional time to complete the funded activities is needed, you may request an extension or budget modification by email. No changes may be made in timing or budgetary use of the grant funds without the CFMC's advance written approval.

Required Reports: The grantee is expected to submit a final report, through this online grant system as scheduled. The final report consists of responses to questions describing progress made toward the purpose and objectives of the grant. The grantee is responsible for maintaining records of grant funds received and the expenses incurred until all grant requirements have been fulfilled and will provide additional detail to the CFMC in a reasonable time should it be requested. Inability to submit completed, timely reports may affect future eligibility for future grants. If the organization applies for another grant before this grant award is expended, you may be asked to submit a progress report on the grant objectives and expenditures, depending on the grant program.

Details regarding a grant, including annual report due dates and online materials submission (e.g., reports, photos, etc.) are saved in your online account. Email correspondence is used

through our online grants manager. It is your responsibility to keep your online account and contact information current by informing us of any changes. More information is available in the Overview Guide to using our online grants system at www.cfmco.org/apply.

Public Information: The CFMC encourages grantees to make announcements of grants upon receipt of the grant payment. The CFMC communications department is available to provide assistance in your communication efforts. We also welcome your photos reflecting the services made possible by the grant.

By submitting this grant request, you are indicating that you understand and agree to the terms and requirements of this grant.

Name of Authorized Board Member

Character Limit: 100

Name of Executive Director or Other Authorized Representative*

(Second person, different than above)

Character Limit: 100

Title*

Character Limit: 50

Use this space for any optional comments or explanations regarding this grant application.

Character Limit: 2000