

# Opportunity 2019

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## *Community Foundation for Monterey County*

### *Grantwriting Tips and Instructions*

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The Opportunity Fund is the Community Foundation's grant program which addresses one-time, non-recurring expenses. Applications are accepted throughout the year for grants to support emerging organizations and ventures, unanticipated needs and other time-sensitive efforts where a small amount of money will make a difference. Opportunity grants typically range between \$1,000-5,000. While larger grants (up to \$10,000) may be considered, they are the exception.

Before submitting a grant application, please review the Opportunity Grant Guidelines, which include more information about funding priorities and requirements. You may also wish to review a list of recent Opportunity grants.

#### **Grantwriting Tips**

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. Watch character count limits on the narrative response questions. The character counter is below each narrative box and the total count **INCLUDES SPACES**.
4. The character counts are maximum limits. You are not required to use all the space.
5. Have someone review your document to ensure clarity. If they have questions, so will our reviewers.
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, contact Karina Gutierrez-Barboza at [grants@cfmco.org](mailto:grants@cfmco.org) or 831.754.5880.

For all other inquiries including fiscally sponsored groups and collaborative proposals, contact Janet Shing at [janet@cfmco.org](mailto:janet@cfmco.org) or 831.375.9712 or 754.5880 x137.

#### **File Upload Instructions:**

For any question below that requires a document to be uploaded, please follow these steps.

1. Create or identify an existing document on your computer that addresses the request. **Include the name of your organization on all documents and in the name of each document that 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 right away, and 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 you just uploaded (it does not indicate an error). (**Note file size limits for each document.**)

## *Organization Information*

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**The questions in this section refer to the OVERALL 501(c3) nonprofit organization, NOT only this request.**

### **Organization's Mission Statement\***

*Character Limit: 1000*

### **Year Organization was Established\***

*Character Limit: 4*

### **Number of Paid Full-time Employees\***

*Character Limit: 10*

### **Number of Paid Part-time Employees\***

*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*

### **What percent of the Board made a financial contribution to the organization in the last year?\***

Board members donate time and often, in-kind donations. This and the following question refers to the total amount the Board donated in cash.

*Character Limit: 3*

### **What was the total amount donated by the Board in the last year?\***

*Character Limit: 20*

## Grant Request

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Describe your work and the objectives you are trying to achieve. Please read all the questions thoroughly before answering.

### Program Name\*

Provide a brief one-line phrase to describe this request. This phrase describes the planned activities and serves as the title of your request in our records. Examples include: "new collaborative initiative to address..." or "expanded classes/program at a new venue in...".

*Character Limit: 250*

### Requested Amount\*

*Character Limit: 20*

### Total Project Budget\*

(for the time period of this request)

*Character Limit: 20*

### Project Start Date\*

This work may extend for more than a year but for grant reporting, what is the proposed 12-month period of this grant request? Remember, grant funds may not be used for expenses already incurred. Opportunity grant applications are generally processed in two months.

*Character Limit: 10*

### Expected Project End Date\*

*Character Limit: 10*

### Briefly describe your request. Include how grant funds would be used.\*

*Character Limit: 2000*

### What community issue(s) does this project address? Why is this critical now?\*

Describe the events that led up to this point.

*Character Limit: 2000*

### How many people are expected to be served by this grant?\*

Be as specific as possible in describing the population to be served, including age, ethnicity and geographic area.

*Character Limit: 250*

### How will your organization fund these activities in the future?\*

Provide information about other funding sources supporting this project.

*Character Limit: 1500*

## Financial Information

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### Date Fiscal Year Ends\*

Character Limit: 10

### Project Budget\*

Upload a budget for this request. You are not required to use this template; however, the project budget should include all project income (committed and pending) and all expenses, clearly showing the specific expenses this grant would support. Contact us if you have questions after reviewing this sample project budget.

File Size Limit: 2 MB

### Organizational Budget\*

Enter the organization's annual budget for the current fiscal year and upload a copy of the organizational budget.

Character Limit: 10 | File Size Limit: 2 MB

### Consulting Services

Upload a copy of the consultant's budget and proposal, if this request would support their work. Include the consultant's proposal outlining their services and costs.

File Size Limit: 2 MB

### Upload complete financial statements for the most recently completed fiscal year including:

#### 1. Balance Sheet or Statement of Financial Position\*

Upload your organization's 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 payable, accrued vacation, plus equity/real estate, vehicles, and long-term debt.

File Size Limit: 2 MB

#### 2. Profit & Loss Statement or Statement of Activities\*

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

File Size Limit: 2 MB

## *Fiscally-sponsored Groups Only*

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Community Foundation accepts applications from non-incorporated groups when a 501(c)3 nonprofit fiscal sponsor serves as the legal and financial manager. Fiscal sponsors agree to be responsible for managing grant funds.

Complete this section ONLY if this application is being submitted by an unincorporated group working with fiscal sponsor. To submit a complete application, applicants are encouraged to speak with a Community Foundation staff person before submitting your application, 831.375.9712 or 754.5880.

### **Provide a brief summary of the sponsored group's mission/purpose.**

*Character Limit: 2000*

### **What is the legal name of the nonprofit fiscal sponsor?**

*Character Limit: 200*

### **Fiscal Sponsor's Tax Exemption**

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

*Character Limit: 10*

### **Annual Budget (of the sponsored group)**

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

*File Size Limit: 2 MB*

### **Leadership (of the sponsored group)**

List the names of the advisory members and/or the leaders responsible for implementing the proposed work. Include their city of residence and profession/expertise.

*Character Limit: 3000*

### **Memorandum of Agreement**

Upload a copy of the memorandum of agreement between the fiscal sponsor and the sponsored group.

*File Size Limit: 2 MB*

## *Collaborative Applications Only*

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### **Collaborative Requests**

Nonprofit organizations are eligible to receive one Opportunity grant per calendar year. Exceptions are made for collaborative efforts. If this is a collaborative request, briefly explain

the nature of this collaboration and each partner's role and responsibilities. If more than one partner organization will receive some of the requested grant funds, this should be clear in the program budget.

*Character Limit: 2000*

### **Upload a copy of the memorandum of agreement among all the partners in this collaborative request.**

Call your program officer if you have questions, 831.375.9712 or 754.5880.

*File Size Limit: 2 MB*

## *Organization Agreement*

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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 characteristics 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, begins approximately 2-3 months after a complete application is submitted

**Final Report Due:** Approximately 15 months after a complete application is submitted

**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, and a final expense report showing how grant funds were spent based upon the budget submitted to the CFMC. 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. Ability 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](http://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. IF a grant is approved, you will be able to save and upload photos directly related to the funded activities to your online account under Photo Release.

**Do you understand and agree to the terms and requirements of this grant?**

If you have any questions, contact your program officer or staff contact immediately, 831.375.9712 or 754.5880, [www.cfmco.org/about-us/staff/](http://www.cfmco.org/about-us/staff/). \*

**Choices**

Yes

**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: 100*

**Name of Executive Director or Authorized Representative of Fiscal Sponsor  
(Fiscally Sponsored Applications Only)**

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 the final expense report.

*Character Limit: 100*

**Title**

*Character Limit: 100*

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

*Character Limit: 2000*