Organizational Development 2021

Community Foundation for Monterey County

Grantwriting Tips and Instructions

Organizational Development grants are intended to help an organization make progress in addressing special, non-recurring management and leadership situations within the organization. Organizational Development grants may be used for a broad range of capacity-building activities including:

- Board development
- Strategic planning
- Agency restructuring
- Fund development planning
- Evaluation and community assessments
- Executive coaching
- Marketing and communications
- Improving information management and systems
- Specialized staff training
- Collaboration management

Organizational Development grants typically range between $1,000 and $5,000. Organizational Development grants do not support staff time/salaries.

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, please contact Karina Gutierrez-Barboza at grants@cfmco.org or 831.754.5880.

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 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 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

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

Program 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: 250

Requested Amount*
Character Limit: 20

Total Budget for OD Project*
(for the time period of this request)
Character Limit: 20

Project Start Date*
Activities funded by an Organizational Development grant are expected to be completed within one year, although related work will often occur before or after that period. When do you expect to begin the work that would be funded by this grant? Remember, grant funds may not be used for expenses already incurred. Organizational Development grant applications are generally processed in two months.
Character Limit: 10

Project End Date*

Character Limit: 10

Briefly describe what you plan to do and what shifts in the organization you expect to see.*

How did you come to understand the need for this activity? Why are these particular activities important to the organization now? If your organization has already taken some steps to address this area, please describe them.

Character Limit: 3000

Who will carry out these activities?*

If working with a consultant or vendor, a copy of the proposal, Scope of Work or estimate is required. It can be uploaded in the Attachments section of the application.

Character Limit: 1000

Related Activities

Briefly describe other activities your organization will undertake to support the goals of this Organizational Development grant, if any.

Character Limit: 1000

How have the COVID-19 and economic crises affected your operations?

Character Limit: 2000

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 Full-time*

Character Limit: 10

Number of Paid Employees Part-time*

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 ask 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

Financial Information

Date Fiscal Year Ends*
Character Limit: 10

OD Project Budget*
Upload a budget for this request. Include the organization's financial and in-kind commitment to project. Staff wages/salaries may be a part of the overall project budget but are not eligible under an Organizational Development grant.

You are not required to use this template; however; the project budget should include all project income (committed, pending and in-kind, if relevant) and all expenses, clearly showing the specific expenses this grant would support. Contact us if you have questions after reviewing this sample project budget.http://www.cfmco.org/wp-content/uploads/2017/12/Sample-Program-Budget-Report-Form-2015-.xlsx

File Size Limit: 2 MB

Consultant's Proposal or Vendor Cost Estimates*
If funds in this request would be used for a consultant, upload a copy of the consultant's proposal, outlining the expected costs and services for this project. If purchasing equipment valued over $100.00, upload a vendor's quote, product price sheet or a scope of work.

File Size Limit: 2 MB

Organizational Budget*
Upload a copy of 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, these financial documents are for 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, vehicles and long-term debt, etc.

File Size Limit: 2 MB

Profit & Loss Statement or Statement of Activities*

Upload a profit and loss statement for 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

Fiscally-Sponsored Groups Only

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

Upload a detailed annual budget (of the sponsored group) 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 memorandum of agreement with the sponsored group verifying the terms of the arrangement and signed by all parties.

File Size Limit: 4 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 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
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, 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 grantee 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 <u>keep your online account and contact information current by informing us of any changes.</u> 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. When 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 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/*

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 Other 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