Organizational Development 2023

Community Foundation for Monterey County

Grantwriting Tips and Instructions

Organizational Development grants are intended to help make progress in addressing special, non-recurring management and leadership situations through activities and investments that strengthen your organization. Organizational Development grants may be used for a broad range of capacity-building activities such as the following.

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

Organizational Development grants range between $1,000 and $10,000. Recent grants have averaged $7,391. In some cases, Organizational Development grants can support staff time/salaries.

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

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: 150

Requested Amount*
Use "5,000" format. Grants are expected to range from $1,000 to $10,000.
Character Limit: 20

Total Budget for Organizational Development Project
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 organizational changes 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?

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 project, if any.

Character Limit: 1000

Organization Information

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

Organization's Mission Statement*

Character Limit: 1000

Year Organization was Established*

Character Limit: 4

Number of paid full-time employees

For the next three questions, 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 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

Financial Information and Attachments

Date of Fiscal Year End*
Character Limit: 10

Organizational Development Project Budget*

Upload a budget for this request. You are not required to use our template; however, the program budget should 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*

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 for $100, 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. The 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.

Do 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*

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