



Spring 2008 Civil Society Grant Guidelines

The following grant guidelines will help you prepare your grant proposal and assemble the required documentation. **Please note that all proposals are to be submitted online no later than 5:00 P.M. on Tuesday, February 19, 2008.**

Important information for all applicants:

- To be eligible for a grant from The San Diego Foundation, preference is given to organizations located in and providing services in San Diego County. Organizations must have 501c3 status. A 501c3 organization may serve as a fiscal sponsor for a charitable organization that does not have tax exempt status if a cooperative relationship between the two can be clearly demonstrated. The fiscal sponsor must be willing to administer the grant and provide regular financial reporting to The Foundation if it is awarded a grant.
- Follow the application checklist and instructions included in these guidelines. Only online application submissions will be accepted.
- A portion of the discretionary funds for all of our programs is earmarked for the **capital needs** of nonprofits. If you have capital needs that are relevant to your project or program, we encourage you to include these as part of your financial request. Examples of these include technology equipment, venue improvements and other long-term assets and materials.

To apply, please visit our website and access our secure online grant forms.

You will be prompted to submit information directly into fields on the website. The bulk of the proposal must be submitted as an attached document. The online process is designed to allow you to stop and save your work at any time.

If you have any questions or difficulty, please contact our Community Grants Coordinator: Kerri Favela at Kerri@sdfoundation.org or (619) 235-2300, extension 1329.

Spring 2008 Civil Society Grant Guidelines: Initiative & Expected Results

The San Diego Foundation's Civil Society Working Group was established with the mission to foster civic engagement to build leadership and support for community-driven problem-solving and innovations. The Working Group is poised to conclude a three year initiative that has focused on regional housing concerns with the following vision:

San Diego is a region in which residents care about one another and are actively involved in improving the quality of life in their neighborhoods. Such a community is characterized by its appreciation of diversity, openness to creative thinking, and effective problem-solving.

A New Consensus for Housing Initiative

The San Diego region requires a shared commitment for informed, inclusive civic engagement for the purpose of planning for strong, satisfying communities. Toward this end, the Civil Society Working Group launched on "A New Consensus for Housing in San Diego County," a three-year initiative to improve the capacities that residents and organizations require to engage around the region's compelling housing needs, and to support strategies that foster successful communities with choices for all.

Project outcomes for the 2006 grants highlighted the critical need for effective outreach and collaboration across geographic, economic and cultural barriers. Civil Society grants in 2007 focused on consensus building, inclusive communication structures, community reinvestment, and community-driven strategic planning. To bring this initiative to a close, 2008 grant-making will prioritize demonstrable expertise and technologies that have potential to contribute to a unified vision and plan for future housing for the San Diego region within one year.

Expected Results of the Initiative

A unified vision and plan for future housing for the San Diego region by 2009 as measured by:

- Dissemination of new and existing research and information on housing options and attitudes to the public, organizations, the business community, government officials and the media.
- Strategic civic engagement that builds the capacity of residents to meet their own and mutual needs and results in replicable models for sustainable community development.
- Strategic community reinvestment that results in workforce housing and revitalized neighborhoods characterized by economic and social diversity.
- Organized convenings of residents, organizations, policy-makers, and other stakeholders that lead to beneficial new relationships, breakthrough thinking, informed and engaged communities over the long term, and ultimately, consensus on a regional plan of action and implementation strategy.

A Data Driven Approach:

The San Diego Foundation will support organizations that demonstrate innovative approaches leading to significant community impact that can be measured by specific metrics and time frames including:

- Research, public opinion surveys and forecasts that educate and inform The Foundation and others about public attitudes regarding current and future housing options in the San Diego region.
- Public communication structures that provide practical information and identify resources related to housing options in the region.
- Community development and reinvestment strategies that leverage private capital to achieve community-oriented goals.
- Frameworks for strategic civic engagement that can be replicated, adapted and deployed in communities throughout the region.
- Proceedings, including findings and recommendations, of forums and other convenings that bring together diverse perspectives, residents, organizations and other stakeholders in dialogue and planning for housing and sustainable community development.

Preference will be given to applicants with current projects, strategic partnerships, demonstrable experience and capacity to achieve expected results, and the commitment to sharing best practices and lessons learned to advance initiative goals. Applicants are encouraged to apply for grants generally between \$50,000 and \$75,000.

Questions? Contact Cheryl Alethia Phelps at cheryl@sdfoundation.org or (619) 235-2300.

THE SAN DIEGO FOUNDATION GRANT PROPOSAL CHECKLIST

Please submit the following items in one Word document or PDF file with the name of your organization, Civil Society Spring 2008 Grant Cycle, and the requested amount in the upper right-hand corner of each page:

- Part A: Project Goals, Objectives, and Expected Results, (maximum of one page)
- Part B: Project Narrative, (maximum of five pages)
- Part C: Project Budget, (maximum of one page)
- A list of grants, if any, received by organization in the last 12 months for this program/project (sources and amounts).
- A list of the organization's current Board of Directors, including each member's name, profession, and office held on the Board, if any.

Please note: After you have submitted your application, we may request copies of audited financial statements, including notes and management letter(s), for the last two fiscal year(s). If audited financial statements are not yet complete for the most recently completed fiscal year, we may instead request unaudited statements for that year. For organizations with a total annual operating budget under \$500,000 and without audited financial statements, 990 tax forms or in-house statements verified and signed by an authorized representative of the organization are acceptable.

Part A: Project Goals, Objectives, and Expected Results

The statement of goals, objectives, and outcomes should be **NO MORE THAN ONE PAGE**.

Organization

A brief statement of your organization's mission, history, and population served.

Goals

The goals should be an inspirational statement. They do not need to be measurable or time-limited. Your goals should specify the social condition that your organization will address and change.

Example:

- *To engage a broad spectrum of San Diego County residents in dialogue, town hall meetings and other forums that influence housing policy in order to ensure that the quality of life for all of our communities is considered in future regional housing plans.*

Objectives

Objectives are the specific, measurable, and time-limited statements of purpose intended to guide your organization's activities toward achieving the goal. Answer the questions: "What steps will you take to achieve the goal and in what timeframe?"

Example:

- *To conduct a study of public dialogue efforts among San Diego County residents regarding housing, the outcomes and plans of action that resulted from these efforts, and lessons learned regarding how to engage more residents who represent a cross-section of San Diego County.*

Expected Results of Your Organization's Program/Project

Expected results are the individual, organizational or community-level changes that can reasonably occur during the grant period as a result of the proposed activities or services. The expected outcomes may relate to a new level of functioning of an organization, new or expanded resources devoted to addressing the goal, or specific changes in the knowledge, attitudes and behaviors among program participants after program participation. The grant objectives and expected outcomes should describe **what is expected to happen as a result of this grant, and how it would support achievement of the expected results of the New Consensus for Housing Initiative (see page 2).**

Example:

- *Applicable research report and analysis of the strengths and weaknesses of past efforts to bring San Diego County residents together in a public forum to discuss the future of housing in the region; project also includes a detailed plan for dissemination and public discussion of the report.*

Part B: Proposal Narrative

The following outline is specific to the Civil Society Grants Program. Please be sure to read the questions carefully and to answer each completely. Please limit your proposal narrative to **no more than five pages**. Clear and concise content, not length, is of greatest importance.

Project Description

- A complete description of the proposed project, how it will be implemented and how its impact will be measured.
- Description of the specific activities that the proposed grant will fund, including the time period in which the project will take place.
- Rationale for the proposed project (why is this important?) and rationale for your organization to lead the work.
- Description of how the proposed project meets the Civil Society Spring 2008 Grant Cycle guidelines.

Population

- Who will benefit from the project, and where will the project take place? Who is the target community/population?
- If this is an existing project, how many participants has it reached to date?
- Are this project, the organization's staff and board accessible to all sectors of the community being served?

Organizational Profile

- Describe your organization's major accomplishments and how the organization will build on these successes to improve impact and effectiveness in the future.
- Describe specific issues that the proposed grant will help the organization address.
- Provide an overview of the organization's strategic plan, if available.
- Provide a description of the senior staff and management structure, as well as proposed staffing for the project, identifying project personnel and any consultants or advisors who will be involved with the project.

Challenges

- What are the key challenges for the proposed project?

Budget and Sources of Funding

A budget request is detailed in Section C of the proposal guidelines; however, it is helpful to include additional details in the narrative, such as:

- Summary of the total project and/or organizational budget, with any narrative detail that might be appropriate about how the grant funds would be used.
- A description of any capital needs included in the proposal. A portion of the discretionary funds for all of our programs is earmarked for the capital needs of nonprofits. If you have capital needs that are relevant to your project or program, we encourage you to include these as part of your financial request. Examples include technology equipment, venue or facility improvements, and other long-term assets and materials.
- A list of other contributors or funding prospects.
- Your sustainability plan and plan for endowment building.

Part C: Proposal Budget

Sample Organization Budget

Total Organization Budget: \$5,000,000

Total Amount Requested: \$25,000

Expense Categories	Requested Amount from TSDF	Total Project Budget
Salaries/benefits	\$ 5,000	\$ 20,000
Project Expenses	\$ 10,000	\$ 30,000
Communications/outreach	\$ 5,000	\$ 15,000
Office Supplies	\$ 5,000	\$ 35,000
Total	\$ 25,000	\$100,000