

Letter of Intent (LOI) Guidelines



2024-2025 Grant Cycle: Civility, Unity, Community Building, and Concern for the Common Good

Mission and Purpose

The mission of Carlsbad Charitable Foundation (CCF) is to improve the quality of life in Carlsbad by meeting emerging needs through:

- Encouraging and increasing responsible and effective philanthropy,
- Building a community endowment,
- Providing funds annually to organizations and causes, and
- Giving the community a vehicle for legacy planning and cash gifts that will benefit the residents of Carlsbad annually and in perpetuity.

The vision of CCF is to inspire a culture of giving that supports, strengthens, and enriches the quality of life in the Carlsbad community now and for generations to come.

The Letter of Intent (LOI) is the first step in a two-step application process, which will facilitate the allocation of funding for Carlsbad-centered projects. The funding range is \$5,000 to \$25,000. CCF will evaluate all LOI submittals and qualify those that meet the project and eligibility criteria.

The deadline for submitting the LOI is **5:00 p.m., December 4, 2023**. Organizations that are moved to the next step of the LOI process will be invited to submit a full application proposal by **January 17, 2024**. Those organizations invited to submit a full application will submit the completed application by **February 7, 2024**.

Focus Area

CCF will be accepting proposals for projects that promote civility, unity, community building and concern for the common good.

- Civility includes respect, courtesy, dignity and tolerance.
- We encourage projects that involve community collaboration, cooperation and partnerships that focus on multigenerational impact in Carlsbad.

Eligibility Criteria

To be eligible all applicants must meet the following criteria:

- Grants must be administered by a 501(c)3 public charity, or an organization that is fiscally sponsored by a 501(c)3, a school or other government agency. CCF does not make grants to supporting organizations or private, non-operating foundations.
- If an organization is using a fiscal sponsor, a cooperative relationship between the two must be clearly demonstrated.
- The project must be achievable within a 12-month timeframe.

Projects will build and/or strengthen one or more of the following elements:

- Applicant encouraged to act as the lead in a collaborative project that brings together a variety of stakeholders such as: other nonprofits, corporations, the City of Carlsbad, first responders and faith-based organizations. MOU is required.
- Project must have specific goals.
- Applicant must outline the strategies and approaches for achieving the goals.
- Project must include evaluation procedures and measurable outcomes to monitor success.
- Project must demonstrate plans for long-term sustainability (future funding viability, etc.).

Frequently Asked Questions

What is the LOI deadline?

The deadline for LOI submission is 5:00 p.m., December 4th, 2023. Incomplete or late applications will not be accepted.

How do we apply?

Letters of Intent (LOI) must be submitted online by no later than 5:00 p.m. on or before December 4, 2023. For 2023, SDF has introduced a [new grant application portal](#) to submit your LOI.

Whether you have submitted an SDF LOI and/or grant application in previous years or not, all nonprofit applicants are required to create a new user account to submit your CCF LOI. After creating your account, click the “Apply” button to access the application.

For additional guidance regarding creating a new user account, please [see this tutorial. Register/apply today.](#)

Who is eligible to apply for Carlsbad Charitable Foundation funding?

To be eligible for a grant from Carlsbad Charitable Foundation, organizations must have tax-exempt status and provide services in the community of Carlsbad. An 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, and the fiscal sponsor must be willing to administer the grant if awarded.

Applications are due no later than 5:00 p.m., Monday, December 4, 2023.

Carlsbad Charitable Foundation at San Diego Foundation does not make grants to supporting organizations or private, non-operating foundations.

How much can we request?

Carlsbad Charitable Foundation will accept requests in the range of \$5,000 to \$25,000.

What is the grant period?

Grants are made for one year. This grant cycle is from July 1, 2024 to June 30, 2025.

What reporting is required?

Carlsbad Charitable Foundation requires a mid-year and a final report; the details of which will be specified in the grant award letter. Carlsbad Charitable Foundation encourages funding and grant recognition through print and social media channels. All grant recipients will be required to submit five high-resolution photographs plus a short cellphone video showcasing the result/impact of the grant with the required final report.

What will CCF not fund?

Carlsbad Charitable Foundation does not fund:

- Capital or annual campaigns
- Existing obligations/debt
- Scholarships
- Projects that promote religious or political doctrine

Who can I contact if I have any questions?

For program questions or technical questions regarding the online application, please contact Eve Childs at echilds@sdfoundation.org.

Letter of Intent (LOI) Required Fields

Please Note: Below are the questions that will be on the LOI application. All information must be typed directly into the fields of the online application and submitted through Foundant. After creating your account, click the “Apply” button to access the application. For additional guidance regarding creating a new user account, please [see this tutorial](#). [Register/apply today](#). All questions with an asterisk are required.

Applicant Information

- **Is your organization a 501(c)(3) public charity?**
- **Does your organization have a fiscal sponsor?**
- **Organization Name**
- **Address, City, State, Zip**

- **Telephone**
- **Website**
- **Organization Budget Size**
- **Tax ID (EIN) Number**

Organization Information

- **DBA:** Please provide if the organization name you use is different from your legal name.
- **Mission Statement*:** Describe the organization's mission and goals.

Fiscal Sponsor Information (if applicable)

- **Organization Name**
- **Address, City, State, Zip**
- **Telephone**
- **Website**
- **Organization Budget Size**
- **Tax ID (EIN) Number**

LOI Questions

- **Serving Carlsbad*:** Does your project serve Carlsbad? (Y/N)
- **Project Name***
- **Amount Requested***
- **Letter of Intent*:** Provide a compelling description of your project, how it aligns with the focus area and why we should support it for Carlsbad.