

A wide-angle photograph of the Golden Gate Bridge in San Francisco. The bridge's two massive towers are visible, with the suspension cables fanning out to support the deck. The bridge spans across a body of water, with a thick layer of white fog or low clouds obscuring the lower parts of the bridge and the water's surface. The sky is a clear, pale blue with a few wispy clouds. In the foreground on the left, a dark, silhouetted hillside is visible.

THE SAN FRANCISCO FOUNDATION

The Community Foundation of the Bay Area

How To Apply Workshop

October, 2011



Agenda

- Introductions
- What we fund
- How to apply
- Q & A



Introductions

The San Francisco Foundation

- James W. Head, Vice President of Programs
- Program Officer/Director
- Program Fellow
- Program Assistant



The Foundation's Mission

The San Francisco Foundation mobilizes resources and acts as a catalyst for change to build strong communities, foster civic leadership, and promote philanthropy.

Impact



In response to the continued economic challenges in Bay Area communities, the Foundation remains committed to:

- Focusing, deepening, and measuring our work to address critical issues affecting the most vulnerable in the region to improve the quality of life for all
- Social justice is our core value
- Commitment to closing the gaps of inequities in the region

Program Areas and Service Areas

Community Health
Arts and Culture
Education
Environment
Community Development

San Francisco

Alameda

Contra Costa

Marin

San Mateo

Grantmaking



- The San Francisco Foundation welcomes applications **once** a year
- Deadlines this year:
 - **November 7, 2011: Arts & Culture and Education organizations**
 - **November 14, 2011: Community Development, Community Health and Environment organizations**
- Applicants must have a valid tax exempt status: 501(c)(3), public entity, or fiscally sponsored.
- Projects must benefit residents in at least **one of the five** Bay Area counties.



What does the Foundation fund?

Core Operating Support

Capacity Building Support

Project Support

Types of Support

Core Operating Support

To support the core operating programs of Shelter Care.

- To support the central, ongoing work of an organization. Funds can be applied toward the general costs of running the operations.
- Distinct from program and capacity building requests in that you do not need to present a specific project or propose an expansion of capabilities.
- Core operating support is most often granted to prior TSFF grant recipients.

Types of Support

Capacity Building Support

To support the planning process for the staff, board, and program development of Community Arts.

- To strengthen an organization's overall ability to achieve its mission.
- Typically, capacity building grants improve organizational efficiency and effectiveness through specific enhancements in staffing, infrastructure, knowledge, or expertise.
- For example, establishing a fund development component or upgrading technological infrastructure.

Types of Support

Project Support

*To support the “**ready for work, ready for college**” tutoring and mentoring program at Denzel Washington Community School.*

- To create new or support existing programs or projects that meet identified community needs.
- Funds may be used to pay for program costs, project staffing, supplies, and other non-personnel costs.

The Foundation generally does *not* fund:

- Projects outside the five-county Bay Area we serve
- Medical, academic, or scientific research
- Religious activities (although religious institutions may apply for nonsectarian programs)
- Direct assistance to individuals
- Conferences or one-time events
- Capital campaigns
- Visit www.sff.org for specific Program information

Concurrent grants allowed 2011-12

- In 2011-12, the Foundation will award overlapping grants to the same organization via the Open Application process.
- As it relates to the three-year limit rule for consecutive years of funding, if your organization was awarded a grant in the 2010 Open Application cycle, an award in 2011-12 will constitute *a second year* of funding.
- Grants from special initiatives, mini grant programs or RFP's do not count toward the three-year limit.

Financial Documents

Audit requirements

- Organizations with budgets of \$1,000,000 and over must provide a recent (within two years) copy of audited financial statements.
- Organizations with annual budgets less than \$1,000,000 are required to provide the most recently filed IRS Form 990.
- Recent Audit from all Fiscal Sponsors

Financial Documents

The Foundation asks for three years of Financial Statements (uploaded as one document; please don't send three Audits):

- Income Sheet
- Balance Statement
- Cash Flow Statement

And three-year Financial History totals (located in Parts I and IV of Form 990):

- Total Revenue
- Total Expenses
- End of Year Assets

Arts & Culture organizations – CA Cultural Data Project - www.caculturaldata.org

Application Process



Online application

Evaluation of application

Decision

Notification and funding

Grantmaking Timeline

Application Deadline	Initial Notification	Approval	Start of Grant Period
November 7, 2011 Education and Arts and Culture	January, 2012	March, 2012	April, 2012
November 14, 2011 Community Development, Community Health, and the Environment			

Applying Online

- <https://granteecenter.sff.org>
- Access Grantee Center from the top of any page on sff.org
- Online resources:
 - Application Guidelines
 - PDF of online application
 - Grantee Center Help page

Please add grantsmanagement@sff.org to your Safe Senders List.

Logging in to Grantee Center

Create your User Account at <https://granteecenter.sff.org>



Register New Account

Please complete the following form to create a new Grantee Center account. Each individual using Grantee Center should create his or her own account. You will have the opportunity to add more organizations to your account once you are logged in, by visiting the My Profile tab. Please note that your account information is different from Primary Contacts for grants; you can designate the grant contact when you fill out your grant application.

First Name:*	<input type="text"/>
Last Name:*	<input type="text"/>
Title:	-- Select -- <input type="text"/>
Position:*	<input type="text"/>
Phone Number:	(<input type="text"/>) <input type="text"/> - <input type="text"/> <input type="text"/> Phone Type: -- Select -- <input type="text"/>
Email Address:*	<input type="text"/>
Username:*	<input type="text"/>
Organization:*	Find / Add Organization

Make me the primary user.

If you are the first user from your organization registering in Grantee Center, you will automatically be designated as the Primary Grantee Center User. An email will be sent to Primary Grantee Center Users each time a new user registers from their organization. If you check this box, you will become the new Primary Grantee Center User and all

Application Overview

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Application overview | [Part 1](#) | [Required Documents](#) | [Preview / Submit](#)

Please provide the information requested below, fields with an asterisk (*) are required. Please visit the [Help section](#) for guideline information specific to this application. If you need to change information about your organization or your fiscal sponsor, please do so in the My Profile section. At the bottom of this page, you can save your application for later, or click "Save and Continue" to advance to the next page now. Please note: you will be logged out after 3 hours; to ensure your information is saved, we recommend you scroll to the bottom of the page and click "Save and View" every 30 minutes while you are working on your application.

Please note that for your application to be saved correctly all fields must be completed on this page and the Save and View Or Save and Continue button clicked to ensure your application is created. If you do not complete all fields and/or do not save the page, and continue on with the application it is possible that no further information will be saved.

The Foundation recommends after completing and saving this page that you click on the My Applications tab and confirm that the application was saved under Applications in Progress. *(Click Edit to continue working.)*

Grantee:	The San Francisco Foundation 225 Bush Street, Suite 500 Modify Address San Francisco, CA 94104 EIN: 010679337 Modify EIN
Mission:	Modify mission
Organization Budget: *	<input type="text" value="\$0.00"/>
Contact: *	<input type="text" value="-- Select --"/> or Create a new contact
Grant Amount*	<input type="text" value="\$0.00"/>
Program Area *	Community Development
Request Duration: *	<input type="text" value="0"/> Months
Grant Purpose: *	<input style="width: 100%; height: 30px;" type="text"/>

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Hello, Talya Sanders

San Francisco Foundation



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Please review the Description and Messages columns for information about the grant purpose and eligibility requirements. You can begin your online applications by clicking Apply Online in the Actions column.

Grant Opportunities

Grant Program	Messages	App Due Date	Grant Period Start	Actions
Education & Arts and Culture Open Application for 2010	-	Dec 06, 2010	May 01, 2011	Apply Online
Community Development, Community Health and Environment Open Application for 2010	-	Dec 08, 2010	May 01, 2011	Apply Online
East Bay Foundation on Aging	This application is for invited guests only.	Dec 03, 2010	Apr 01, 2011	Apply Online

Application Guidelines

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Learn about grant opportunities and begin your application.

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Work on your current grant applications and view past applications. You can save an application in progress and return to this section to continue an application you started in a previous session.

My Grants
Review your current and past grants, and access reports and correspondence forms.

My Profile
Review and update your Grantee Center account information.

<http://www.sff.org/grantseekers/application-guidelines>

News & Resources

Scheduled Maintenance on Saturday, August 6th
Grantee Center will be unavailable on Saturday, August 6th from 8:00 p.m. to 10:00 p.m., due to scheduled maintenance. We apologize for any inconvenience and appreciate your patience.

2011 Open Application Cycle Begins October 3rd and Immigrant Integration Fund Applications Available November 7th
The San Francisco Foundation is pleased to announce we will begin accepting applications for our 2011 Open Application Cycle on Monday,

Application Highlights: Three Narrative Questions

- Brief history of your organization, current programs and services. (1200 characters)
- The issue/problem/need your organization is working to resolve and how you are addressing it, including research or best practice models. (1750 characters)
- The work your organization is requesting funding for and the impact your organization is trying to achieve. Address how the work aligns with the Foundation's grantmaking objectives. (1750 characters)

Short Purpose, Outcomes and Activities

Short Purpose:

- To provide direct mental health support services to frail, isolated and homebound seniors in Alameda County.

Outcome:

- The capacity to serve more homebound seniors with supportive mental health services will be increased, reducing isolation and positively impacting Alameda County seniors' ability to safely age-in-place.

Activities:

- Increase the number of clients served with home-based counseling from 100 to 130 seniors annually.
- Recruit and train five interns through the Volunteer Training Program to work as counselors for geriatric clients.

Population Served

Diversity Policy

- The Foundation actively seeks to promote access, equity, and diversity, and to end discrimination based on race, ethnicity, gender, sexual orientation, disability, or age.
- The Foundation's grantmaking policy reflects a belief that organizational performance is greatly enhanced when people with different backgrounds and perspectives are engaged in an organization's activities and decision-making process.
- The Application Diversity Table asks for estimates related to people served, as well as the actual ethnic breakdown of staff and Board Members.

Review and Submit

Review and submit your application in Grantee Center

Cancel

Save as Application in Progress

Submit Application

- Due to typically high volumes of applications in the Open Application Cycle, you may receive a system error on Submit. Please try logging off and submitting at a later time.
- Once your application has been submitted, you will receive a confirmation email from grantsmanagement@sff.org.

Application Evaluation

Consideration is given to:

- Alignment with the Foundation's mission, goals and objectives
- Relative strength and impact of application and organization
- Potential contribution to meeting the changing needs of the Bay Area
- Diversity and balance among grantees within a funding cycle

About ten weeks after the application deadline, notification will be sent via email from grantsmanagement@sff.org to the Grant Contact, either declining or informing of continued consideration for approval.

Application Evaluation

A Program Director, Officer, or other Program staff may contact you to discuss your application and organization further and might schedule a site visit.

Areas of further inquiry may include:

- alignment with the Foundation's mission, goals, and objectives;
- organizational strengths, including leadership;
- potential contribution to meeting the changing needs of the Bay Area;
- program approach, scale, innovations, risks, and operational best practices;
- financial viability and sustainability; and
- reputation among other partners and funders.

Decision

Application Deadline	Initial Notification	Approval	Start of Grant Period
November 7, 2011 Education and Arts and Culture	January, 2012	March, 2012	April, 2012
November 14, 2011 Community Development, Community Health, and Environment			

Notification and Funding

- Once an application is approved, an award letter and grant agreement will be emailed from grantsmanagement@sff.org to the Grant Contact, confirming the approved grant amount, the activities to be undertaken, and the information to be included in the progress and final reports.
- Grant Agreements require two signatures - that of the Executive Director (or Fiscal Sponsor), and that of a Board Member – to be considered fully executed.
- Grant checks are mailed approximately one week after the fully executed grant agreement is received from the grantee.

Contact Information



For Content questions:

- Respective Program Staff

For Technical questions:

- Cindy Gonzales at cag@sff.org or 415-733-8548
- Karen Campbell at kcampbell@sff.org or 415-733-8571