

Eden Area Foundation

Grant Guidelines and Application Procedures

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Eden Area Foundation

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Background

Eden United Church of Christ accepted bequests from Gordon Oliver and Alden Oliver, who directed that the funds “be used for local church purposes.” In 1999, after an ongoing process of prayerful discernment, Eden Church created the Eden Area Foundation and transferred a substantial portion of the bequest to the Foundation; the Foundation maintains a permanent endowment of charitable funds.

The objective of the Eden Area Foundation’s stewardship and development of these philanthropic funds is to carry out donors’ wishes by serving the following purposes:

- To support Christian outreach programs for the welfare of the local community;
 - To exercise such stewardship in ways that promote Christian principles, demonstrate Christian compassion in the community, and enliven Eden Church itself.
-

Current guidelines

Please make sure you have the most current guidelines, as they may be revised annually. Please check the Foundation’s web page for details and to download forms at www.edenareafoundation.org. You can contact the Program Department via e-mail at grants@edenareafoundation.org.

Eligibility

Who is eligible?

To be eligible for funding, an applicant organization must meet the following eligibility requirements:

- It must be a 501(c)(3) tax-exempt charitable organization.
 - It must provide services to residents of Alameda County and include a significant representation of Alameda County residents on its governing board.
 - It must have an annual financial audit in accordance with approved accounting practices.
-

Applicant characteristics

The Foundation seeks to make grants to organizations having:

- committed, enthusiastic and diligent leadership;
 - specifically defined goals and purposes;
 - demonstrated effectiveness and good expectations for measured success in their continued activities; and
 - broad-based public support.
-

Areas of interest

The Foundation's primary areas of interest are:

- Children and Youth
 - People in Need
 - Community Relations
-

Limitations and exclusions

The Foundation will not provide funding for the following:

- Individuals
 - An organization that is for profit
 - Profit-making enterprises of a nonprofit organization
 - An organization that is classified as a private foundation
 - An organization whose principal activity is fundraising
 - An organization whose principal activity is for the benefit of its own membership (such as veterans, fraternal, labor, service club, military, or similar organizations)
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Eligibility, continued

Non-eligible purposes

The following purposes are not eligible for funding:

- partisan political activities
 - annual fund appeals, fundraising events, dinners, advertising or associated activities
 - administrative costs in excess of twenty percent of the funding request
 - programs that directly benefit members of the Foundation Board, the staff of the Foundation, or their families
 - endowments
 - agency celebrations
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Geographical limitations

The Foundation will give special consideration to organizations located in the Eden area (including Hayward, San Lorenzo, Ashland, Cherryland, Castro Valley, and San Leandro). Grants will not be made for organizations or projects located or primarily serving areas outside of southern Alameda county.

Funding cycle

Grants are generally made on an annual basis although consideration will be given to multi-year proposals.

Size of grants

Grants usually range between \$1,000 and \$20,000, although these are not absolute limits.

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Timeline for Application and Awards

The application and award process for grants from the Foundation uses the following timeline, to which we strictly adhere:

		Refer to:
April 1, 2002	Letter of Intent due in Foundation office	Application Process
mid-April, 2002	Selected agencies requested to submit full proposals	
July 1, 2002	Grant Proposal due in Foundation office	
November 2002	Status of request sent to applicant organization	Review Process
January 1, 2003	Funding begins for approved projects	Reporting Requirements
July 31, 2003	Mid-year report due for grants of \$5,000 or more	
February 2, 2004	End of year report due for all grants	

Application Process

Contact with Foundation

All contact with the Foundation regarding grant requests should be addressed to the chairperson of the Grant Committee and made through the Foundation office at the address shown on the first page.

Unless initiated by a Foundation director, personal communication regarding grant proposals with an individual director by representatives of applicant organizations is not encouraged.

Letter of Intent

An applicant organization that meets the *Eligibility Requirements* may submit one grant proposal per year for a program that is consistent with the *Funding Philosophy*. An organization with multiple departments should coordinate their requests through a central department.

The process begins with a one to two page *Letter of Intent* that contains the following:

- A brief description of the applicant organization
 - A brief description of the project for which funding is requested
 - The amount of funding sought from this Foundation and any other sources of funding (both anticipated and committed)
 - A statement describing the applicant organization's current status as a 501(c)(3) tax-exempt charitable organization
-

Review by Grant Committee

The Foundation's Grant Committee will review *Letters of Intent* to ensure consistency with the guidelines. The Committee will select projects for which a full proposal will be requested.

Site visit

As part of the review process, a site visit may be scheduled.

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Application Process, continued

Notification

The applicant organization will be notified in writing if a full proposal is requested by the Foundation. If notified that a full proposal is not requested, the applicant organization may submit a Letter of Intent for a project in any future funding year.

A request for a full proposal should not be construed as an indication that the grant request will be approved.

Grant proposal

When a full proposal is requested by the Grant Committee, it must include the following information in the order listed:

- Project summary (using attached EAF Project Summary Form)
- Description of the applicant organization including mission, programs, and accomplishments
- Description of relationships with other organizations
- Description of project
- Financial information
- Roster of the organization's officers and other governing board members including their affiliations and addresses

The application may include other printed materials (such as news articles, or literature from the organization) that are pertinent to the proposal.

Note: If any portion of the proposal does not apply to the applicant organization or project, include an explanation of its omission.

Proposals must be submitted in English.

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Application Process, continued

Description of project

The description of the proposed project should include the following information:

- Problem or need being addressed by the project (including target population to be served)
- Project goal, mission or objective
- Project activities and timeline
- Desired outcomes and plans for measuring the success of the project
- Structure and administration of this project including brief biographical information and annual salaries of project personnel
- Relationship of this project to past, present, or planned projects of the applicant organization

This description must not exceed five pages.

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Application Process, continued

Financial information

The following financial information must be included with the proposal:

- *Project Budget*
 - If the project is independent of other agency programs, all income and expenses for the project
 - Current and past sources of funding
 - Needs for ongoing funding and plans to develop sources of funding
- *Financial Reports*
 - Financial statement for the most recently completed fiscal year (Income Statement and Balance Sheet)
 - Year-to-date financial statements
 - Audited financial statement for most recent year available
- *Agency Budget*
 - Budget for the current fiscal year
 - Budget for the year for which funding is sought including an indication of the activities that Foundation funds will support
- *Budget Narrative*
 - Explain any significant changes in revenues or expenses from one year to the next
 -
 - Describe in-kind and other non-cash contributions
 - Describe the organization's funding base including percentages from government sources, foundations, contributions, earned income, etc.
- *Charitable status*
 - Internal Revenue Service determination of 501(c)(3) status
 - Statement signed by an officer of the organization that its tax exempt status has not been revoked

Use of fiscal agent

An applicant organization that does not have non-profit status must have a non-profit sponsoring organization that serves as its fiscal agent. In this case, the proof of charitable status must be for the sponsoring organization. In addition, the sponsoring organization must provide a letter describing its fiscal relationship to the applicant organization.

Submission Requirements

Timing of submission

When the timeline calls for a submission from the applicant organization, the submission must be received in the Foundation office by 5 p.m. on the indicated date.

Submissions may be made in person or by mail.

Early submissions encouraged

If a *Letter of Intent* or *Grant Proposal* is submitted early, it will be reviewed for completeness and clarity. If this review reveals any problems, the applicant organization will be contacted to revise the proposal.

Incomplete submissions received at or near the deadline will not be considered.

One copy

The applicant organization should provide one copy of all submissions to the Foundation.

Format of submission

To facilitate copying of the submission, it must conform to the following requirements:

- Submissions must be on letter size paper (8 ½ by 11 inches).
- Submissions must include pages that are numbered.
- Submissions must not be bound or stapled.
- Submission should use 12-point or larger type and must not use anything smaller than 10-point type.
- Submissions should use margins of one inch or greater and must not use margins of less than one-half inch.

Submissions that do not conform to these requirements will be returned to the applicant organization. Failure to follow these requirements is not grounds for extending the deadline for submission.

Use of facsimile

Letters of Intent and *Grant Proposals* must not be submitted via fax.

Submissions of *reports* may only be made via fax if a paper submission follows in a timely manner.

Review Process

Review by Grant Committee

The Foundation's Grant Committee will review all complete *Grant Proposals* that are submitted by the deadline. It is impossible to respond affirmatively to all submissions, no matter how worthy the proposal. Nevertheless, the Grant Committee carefully and seriously considers each submission in light of the Foundation's priorities and the amount of money available for distribution. The Grant Committee makes a recommendation to the Foundation's Board of Directors regarding which proposals should be funded.

Community-based organizations

It is expected that applicants are community-based organizations that encourage the active participation of those they serve. Applicant programs must give evidence of the durability of the agency as well as a record of fiscal responsibility. Applicants must offer their clients and staff due rights and dignity.

Review criteria

Proposals must demonstrate:

- Clearly defined outcome objectives, appropriate to the scope of the project, and a well-articulated plan for measuring and tracking those outcomes over time.
 - Organizational capacity to carry out the proposed activities and to achieve the intended outcomes.
 - Sound fiscal and management practices and a commitment to improving organizational effectiveness at all levels.
 - A likelihood of leveraging Eden Area Foundation funds as well as public and private resources to achieve sustainability.
-

Site visit

As part of the review process, a site visit may be scheduled.

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Review Process, continued

**Review by
Foundation
Board**

The Foundation's Board of Directors reviews the recommendations of the Grant Committee and makes a final determination of the proposals that will be funded.

Notification

The applicant organization will be notified in writing if its proposal will be funded by the Foundation. If a proposal is not funded, the applicant organization may submit a Letter of Intent for a project in any future funding year.

**Hold
Harmless
Form**

A *Hold Harmless Form* will be included with the notification letter to the applicant organization. This form must be signed by the chairperson of the organization's governing board and by the Executive Director. No funds will be released until this form has been signed and returned to the Foundation office.

Grant Recipient Requirements

Release of funds	Typically one-half of the grant funds is released in early January and one-half is released in early July. Multiple year grants are similarly divided into equal payments.
Reports	<p>The Foundation requires all grant recipients to provide narrative and financial reports during the grant period. Grants of \$5,000 or more must report every six months. Grants of less than \$5,000 must report at the end of the grant period.</p> <p>Funds will not be released for a six-month period until a complete report for the prior period has been received in the Foundation office.</p> <p>The Foundation will not consider a <i>Letter of Intent</i> from an organization unless all required reports for any prior grants were submitted in a timely manner.</p>
Site visits	A Foundation representative may make periodic site visits or request periodic meetings at the Foundation's offices to monitor the grant in progress.
Project changes	Major changes in a program or funding during the grant period must be disclosed in writing to the Board for approval.
Unused funds	All unused funds for a specific project <u>must</u> be returned to the Foundation.

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Grant Recipient Requirements, continued

Project outcomes

The Foundation seeks to fund programs that clearly articulate how an organization's outcomes contribute to long-term community goals. You may wish to distinguish among the following types of outcomes:

- **Individual / Community:** How has the program helped individuals and/or communities to maintain and improve their well being?
 - **Organizational:** In what ways have organization(s), collaboratives and partnerships, and networks of stakeholders been strengthened?
 - **Systems:** In what ways have the public and private systems within which you operate become more collaborative, efficient, effective or responsive to the needs of children, families and communities?
-

Eden Area Foundation Project Summary Form

Project name _____

Date submitted _____

Amount requested from EAF _____

Organization Name _____

Address _____

Telephone _____

Fax _____

E-mail _____

Organization director _____

Title _____

Contact (if other than director) _____

Title _____

Total Agency Budget _____ **Fiscal Year:** _____

Total Project Budget _____ **Fiscal Year:** _____

Type of project: New Ongoing **Start date:** _____

In the space below, give a brief description of the program, but do not explain the need for the program nor the problems or issues being addressed. (Such explanations should be included in the narrative of your proposal.)

Grant Proposal Checklist

A complete *Grant Proposal* must include the following items assembled in this order:

- Eden Area Foundation Project Summary Form
- Description of the applicant organization
 - Mission, programs, accomplishments, etc.
 - Relationships with other organizations

Description of project

- Problem or need being addressed by the project (including target population to be served)
- Project goal, mission or objective
- Project activities and timeline
- Desired outcomes and plans for measuring the success of the project
- Structure and administration of this project including brief biographical information and annual salaries of project personnel
- Relationship of this project to past, present, or planned projects of the applicant organization

Financial information

- Project Budget
- Financial Reports
- Agency Budget
- Budget Narrative
- Internal Revenue Service determination of 501(c)(3) status
- Statement from an officer of the organization that tax-exempt status has not been revoked
- Roster of the organization's officers and other governing board members including their affiliations and addresses
- Optional: other printed materials (such as news articles, or literature from the organization) that are pertinent to the proposal
- Optional: feedback on the grant application process

Note: If any portion of the proposal does not apply to the applicant organization or project, include an explanation of its omission *in the same location where the item should appear*.

Eden Area Foundation Hold Harmless Form

In accepting a grant from the Eden Area Foundation, the grantee hereby irrevocably and unconditionally agrees to indemnify and hold harmless the Eden Area Foundation (and its directors, officers, employees, volunteers, and/or agents) from any and all claims, judgments, liabilities, losses, and expenses that in any way arise (directly or indirectly) from any act or omission of the grantee (and its directors, officers, employees, volunteers, and/or agents) in applying for or accepting such grant from the Eden Area Foundation, in expending or applying the funds furnished pursuant to such grant, or in carrying out the program or project or activity to be funded or financed by such grant. In addition, the grantee also agrees to pay for all costs of defending the Eden Area Foundation in any legal action arising from the preceding.

The undersigned acknowledges that he/she (they) is (are) authorized to act on behalf of the grantee in executing this document.

_____ Date: _____

Grantee: Chair, Board of Directors

_____ Date: _____

Grantee: Executive Director

_____ Date: _____

Eden Area Foundation

Title: _____