

# **Eden Area Foundation**

## **Grant Guidelines and Application Procedures**

Last updated: April 19, 2012

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## **Eden Area Foundation**

21455 Birch Street

Hayward, CA 94552

(510) 727-6753

[grants@edenareafoundation.org](mailto:grants@edenareafoundation.org)

### **Background**

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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.
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### **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](http://www.edenareafoundation.org). You can contact the Program Department via e-mail at [grants@edenareafoundation.org](mailto:grants@edenareafoundation.org).

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## 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 the Eden Area. The Eden Area is in central Alameda County and includes the incorporated cities of Hayward and San Leandro and the unincorporated areas of Ashland, Cherryland, Castro Valley, and San Lorenzo.
  - It must have an annual financial audit in accordance with approved accounting practices.
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### 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.
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### Areas of interest

The Foundation's primary areas of interest are:

- Children and Youth
  - People in Need
  - Community Relations
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### 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 grant proposal is for the benefit of its own membership (such as veterans, fraternal, labor, service club, military, or similar organizations)
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**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 projects located or primarily serving areas outside of the Eden Area.

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**Funding cycle**

Grants are generally made on an annual basis for specific projects and on a three year cycle for grants supporting the general operations of an eligible organization, although consideration will be given to multi-year projects.

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**Size of grants**

Grants usually range between \$1,000 and \$30,000, although these are not absolute limits.

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## Timeline for Application and Awards

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

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The application and award process for grants from the Foundation occurs over a three-year span and uses the following timeline. If a specific date is given and that date is not a business day, the next business day will be used. The Foundation strictly adheres to this timeline.

<b>Application Year</b>		<b>Refer to:</b>
June 1	Letter of Intent due in Foundation office	<b>Application Process</b>
Mid-July	Selected agencies requested to submit full proposals	
September 1	Grant Proposal due in Foundation office	
Mid-November	Status of request sent to applicant organization	<b>Review Process</b>
<b>Funding Year</b>		
January 1	Funding begins for approved projects	<b>Reporting Requirements</b>
July 31	Mid-year report due for grants of more than \$5,000	
<b>Reporting Year</b>		
February 1	Annual and end of year report due for all grants	

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## Application Process

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### 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.

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### 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 or activity for which funding is requested. For the purposes of the application process, “project” is used for both projects and for organizations requesting support for multiple years.
  - 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
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### 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.

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### Site visit

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

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## **Application Process, continued**

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### **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.

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### **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**

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### **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

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### 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.

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## Submission Requirements

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### 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 should be made by email to [grants@edenareafoundation.org](mailto:grants@edenareafoundation.org). Supporting documents such as brochures and pamphlets which cannot be easily emailed may be mailed or delivered in person.

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### 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.

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### One copy

The applicant organization should provide one electronic copy of all submissions in Adobe Acrobat PDF format to the Foundation.

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### Format of submission

To facilitate paperless online viewing and posting of the submission by Grant Committee and Board members, documents must conform to the following requirements:

- Submissions must be formatted for letter size paper (8 ½ by 11 inches).
- Submissions must be formatted with numbered pages.
- Submission should use 12-point or larger. 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. Deadlines will not be extended for failure to follow these requirements.

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## Review Process

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### **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.

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### **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.

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### **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.
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### **Site visit**

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

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**Review Process, continued**

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**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.

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**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.

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**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.

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## Grant Recipient Requirements

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**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.

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**Reports**

The Foundation requires all grant recipients to provide narrative and financial reports during the grant period. Grants of more than \$5,000 must report every six months. Grants of \$5,000 or less must report annually. All grants must report at the end of the grant period.

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.

The Foundation will not consider a *Letter of Intent* from an organization unless all required reports for any prior grants were submitted in a timely manner.

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**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.

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**Project changes**

Major changes in a program or funding during the grant period must be disclosed in writing to the Board for approval.

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**Unused funds**

All unused funds for a specific project must be returned to the Foundation.

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## Grant Recipient Requirements, continued

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### **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?
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## Report Contents

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<b>Report</b>	<b>Due Date</b>	<b>Who files</b>	<b>Contents</b>
Six Month	July 31	Grants of more than \$5,000	Description of how grant funds have been used and accomplishments to date including: <ul style="list-style-type: none"> <li>• Project activities to date</li> <li>• Updated project timeline</li> <li>• Project Budget showing expenditures to date</li> <li>• Any changes in the project</li> </ul>
Annual	February 1	Multiple year grants	Description of how grant funds have been used and accomplishments to date including: <ul style="list-style-type: none"> <li>• Activities to date</li> <li>• Activities to be undertaken in the next year</li> <li>• Accomplishments measured by the criteria of the grant proposal</li> <li>• Updated timeline</li> <li>• Budget for the past year showing projected and actual expenditures</li> <li>• Budget for the next year</li> <li>• Financial statement for the most recently completed fiscal year (Income Statement and Balance Sheet)</li> <li>• Any changes in the project</li> </ul>
End of Grant	February 1	All Grants	Description of how grant funds have been used and accomplishments including: <ul style="list-style-type: none"> <li>• All Funded Activities</li> <li>• Accomplishments measured by the criteria of the grant proposal</li> <li>• Updated timeline</li> <li>• Budget for the grant showing projected and actual expenditures</li> <li>• Financial statement for the most recently completed fiscal year (Income Statement and Balance Sheet)</li> </ul>

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# Eden Area Foundation Project Summary Form

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<b>Project Name</b>	_____
<b>Date Submitted</b>	_____
<b>Amount Requested from EAF</b>	_____
<b>Organization Name</b>	_____
<b>Address</b>	_____ _____
<b>Telephone</b>	_____
<b>Fax</b>	_____
<b>E-mail</b>	_____
<b>Organization Director</b>	_____
<b>Title</b>	_____
<b>Contact (if other than Director)</b>	_____
<b>Title</b>	_____
<b>Total Agency Budget</b>	_____ <b>Fiscal Year:</b> _____
<b>Total Project Budget</b>	_____ <b>Fiscal Year:</b> _____

Type of project:

New

Ongoing

\_\_\_\_\_ **Start date (mm/dd/yyyy)**

*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

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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

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Grantee: \_\_\_\_\_

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: \_\_\_\_\_