

### **CFGV Community Grants**

Overview and Tips

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The following handouts were distributed. All may be found at <https://cfgv.org/nonprofits/cfgv-competitive-grant-cycle/>:

- *Guidelines & Required Attachments*
- *Word version of Application Questions*
- *How Panelists Score*
- *Financial Reviewers Form*

Read the guidelines, application questions, and list of required supplementary items NOW. Most of the required supplementary items cannot be created (like policies that need to be approved by the board) or obtained (like an updated IRS letter) at the last minute!!

If you are a new applicant, or an applicant that has not applied (successfully) in some time, talk to the staff in advance.

You are eligible to apply if you are a 501c3; an entity using a 501c3 as a fiscal sponsor; or a government entity that is primarily grant-supported (by which we mean, grants supporting both staff and programs).

You can request funding for a project or for operations (which means, any funding can be applied to anything you do – administration or program).

- You can't ask for operating support unless you have received a CFGV grant within the past 3 years.
- Government entities can't ask for operating support.
- If you apply for a project, you can ask for no more than 50% of the total CASH cost of the project. (Tip: if you've been doing this project for awhile, it is smart to ask for less than 50% of the cash cost.)
- If you apply for a project, it must be for something that happens between July 1 and April 30. If you are applying for operating support, you must have spent our money before April 30.

Your request must be for direct local impact (beyond economic impact). This can be challenging if you affect a lot of visitors, but it's important to remember CFGV's mission is to serve Gunnison Valley residents directly. Your proposal will be reviewed on your impact to residents.

#### **New this year:**

- Vocabulary – we have tried to make it clear what the distinction between “applicant” (the legal entity that is responsible for contract execution) and “group” (the entity that will be doing the work) is, and who needs to sign the application.
- You can't seek a project grant for scholarships. You can however include scholarships in your request for general operating support (remember, GOS is for anything you do, and you don't have to tell us up front how you plan to spend the money).

- As always, you cannot request funds for building or renovation or major equipment. Gray areas are costs related to building (such as architect's fees) and what constitutes "major" equipment. To be safe, we discourage these altogether for Project grants, though if you are applying for GOS you are probably fine since you will not be detailing how you will use our funds. If you have questions, call the staff. Staff may need to consult the Grant Review Committee Chair to determine eligibility.
- All nonprofits will submit complete fiscal policies.

**Your application package includes:**

- The application form, with all questions answered;
- The uploads that we require (you are allowed a couple extra, your call);
- Your most recent final Grant Report – the panel will have access to it, and is urged to review it; this can affect your community impact and management scores (for better or worse!);
- The written comments you received after your most recent feedback session with the staff. Addressing, or failing to address, these comments can affect your score.

The Grant Review Committee includes full- and part-time residents from both ends of the Valley. This means the reviewers may never have heard of you or have any grasp of the issue you address. One or more reviewers may not know the degree of importance of a particular issue locally. Therefore panelists may not bring in outside information about you – even if they know something – and they may only discuss and score using what you have provided to them. Be sure to provide adequate context!

A couple of questions we ask that often cause people to scratch their head.

- We value both depth and breadth. One organization's mission may address a very small population but may have a profound impact upon them. Another organization's mission may be to let a lot of people experience something. We value both equally.
- Have you had an audit? Not all organizations need to have an audit every year. Sometimes, a fiscal review is ok. The key is to know when you need one (for example, at the start of a capital campaign, you should have an audit showing you are squeaky clean) and to have a policy about audits or reviews (for example, in your financial policy you might say that you will have an audit every three years with financial reviews on the years in between).
- Do take the opportunity we provide you to explain anything that might look odd about your financials to an outsider. There is a narrative question giving you the chance to explain anything that may be confusing or odd, and you can always include an explanation in your financial attachments.

**Here is how your proposal is reviewed:**

- Staff first decides if it is eligible.
- If it is eligible, but warrants docking, staff docks.
- Proposals are sent to the Grant Review Committee. They have 3-4 weeks to review.
- Two of the reviewers are explicitly asked to spend the bulk of their time assessing your financial health.
- The Grant Review Committee gathers for a full day in June to review all eligible proposals. Given the number of proposals we receive, each application gets about 10 minutes of discussion! (Tip: be very succinct and explicit. Make it very clear what you are doing and how you will use our money. Make sure everything is complete (so that no one says, "Maybe they didn't say it here, but could anyone find in one of the supplementary items any evidence that they do \_\_\_\_\_?") Don't make the panelists have to guess or assume anything!)

- At the end of each discussion, the two financial reviewers make a statement about their observations on your financial health.
- The reviewers can allocate up to 25 points in each of 4 areas: your mission/programs, your community impact, your management, and your financial health.
- Scores are aggregated. At the end of the discussion, the applications are ranked from strongest to weakest.
- The reviewers have the option of eliminating proposals from consideration for grant funding. They may do this by a) identifying a significant gap in scores beneath which it's clear that the proposals are considered weak, or b) identifying a "line" beneath which they believe that qualitatively, the applications simply aren't very strong.
- The reviewers then start at the top, and create a decision rule. It might be, "the top three applicants' rankings are significantly above the next score. They may warrant 100% of funding."
- The Grant Review Committee makes recommendations to the Board at its meeting at the end of June. The Board reviews the recommendations and the rationale for the recommendations, and either affirms or modifies the list.
- You are informed immediately afterwards. If you are funded, you are provided a contract which must be signed before you can get a check.
- The grants ceremony is July 7. Checks will be given out at this ceremony to all organizations that have returned their grant contracts.
- Almost as soon as you learn whether you are funded, you will be contacted by CFGV staff. Each applicant – eligible or not, funded or not – gets at least a 30 minute private conversation detailing the strengths and weakness of the proposal. This conversation will be summarized briefly in writing which can be used as a guide by next year's grantwriter at your organization.

#### **Some tips:**

- The most common errors applicants can make are:
  - Inconsistent or apparently inconsistent information. If you state that your project budget is \$X in one place, the budget you attach must not show that the project budget is \$Y. There may be a rationale for why it is different but you need to tell us explicitly! There is a way to do that: one of the questions is, "If there is anything in your finances that you think might confuse the panel, explain it here." This is also where you can explain that a one-shot gift or one-time expense makes your operating budget appear to be fluctuating wildly – when in reality it isn't. Or, you can explain that because of seasonality you always run a big deficit in quarter two that gets totally made up for in quarter three, etc.
  - Not including dates or titles on your uploaded attachments such as policies or financials. Even though each upload has a "name", it's a good idea to include relevant information on the actual document. If a reviewer downloads your budget-to-actual to take a close look, and there's no dates on the top, they may or may not spend time digging to figure out your fiscal year.
  - Not being clear how you will be spending the money (for project grants) – for GOS, you don't tell us how you will spend the money as you can use it for anything you do
  - Not letting us see that the "issue" is an "issue." Many simply repeat their mission statement. Others say that there is a big issue of (eg) domestic violence here but don't show us numbers to back it up. Others say that the issue is in reality the solution – example – "the issue is that there isn't a tennis team here" where in fact the absence of a team is not the issue – rather, a team might be a way to address \_\_\_\_\_[something – and the "something" is the issue!]

- Not submitting a project budget with both income and expenses; and where income and expenses are the same. (Note: remember that in-kind goes on BOTH sides of the equation!)
- Failing to link the evaluation to the issue. The arc: Issue --- your idea/your organization – evaluation. Your evaluation has to show that the issue will be a little less severe thanks to you!
- For those who have been working on the same project, or with an organization that has some history, failing to tell us what past evaluations have taught you.
- Responding to the evaluation question by saying that you will do a survey but not telling us what it is you are trying to find out.
- Repeating the same thing over and over. The questions are each trying to get at something different. If you feel that a given question is asking the same thing another question asked, call the staff for clarification!
- Failing to provide numbers, statistics and specifics that show the scope and impact of what you do.
- Showing a project budget where the expenses and the income are not the same, and/or failing to show that you have a match and where it is coming from.
- Resources
  - The staff. Maryo 641-3570– she is the place to start on content. Alicia 641-8837 can help with technology and detailed questions about the budget. We are happy to talk more than once! Remember there isn't much we can do for you at the last minute. And, we cannot review a draft.
  - For recreation, arts and history, “issue” and “evaluation” hard to get a handle on. We have created a tool kit for you, which you will find with the application materials.
  - If anyone is considering using a fiscal sponsor, we have provided some tools for you on that. This is a term which implies that you and your sponsor have a binding relationship by which the sponsor takes legal responsibility for you.

CFGV Community Grants are administered online through Survey Monkey. You can begin your application by going to <https://cfgv.smapply.org>. While the system is new, your old password should work. If you have any trouble with creating an account or logging in, please call or email Alicia, 641-8837 or [Alicia@cfgv.org](mailto:Alicia@cfgv.org).