



# 2024 Grants Cycle

Information Session  
12/7/2023

# PACF Grants Cycle: Agenda

Introduction	Lisa Van Dusen, Executive Director
The Grants Process	Lisa Van Dusen
The Nuts & Bolts	Suzanne Attenborough Director of Communications & Operations
What's Next	Suzanne Attenborough
Q & A	All

# PACF Grants Cycle

## Trust Based Philanthropy

- General Operating Support
- Two-year support at discretion of PACF for a subset
- Beyond the dollars support

The four pillars of **our commitment to the community**:

- Uplift the Vulnerable
- Enhance Community Life
- Support Families
- Encourage Educational Equity

**Geographic Area:** Must *currently* serve people in Palo Alto, East Palo Alto, and/or Menlo Park

## Recent history:

2023 granted \$1.725M to 84 organizations

2022 granted \$1.7M to 93 organizations

2021 granted \$1.17M to 88 organizations

# PACF Grants Application Process: Nuts & Bolts

- **Who may apply**

- Basic criteria
  - 501c3 nonprofit organization or have a fiscal sponsor that is a 501c3 organization
  - Must currently provide services in Palo Alto, East Palo Alto and/or Menlo Park
- Complete brief eligibility questionnaire before accessing full application

- **PACF does not consider funding requests for**

- Individuals
- Organizations that do not currently serve Palo Alto, East Palo Alto and/or Menlo Park
- Religious activities
- Partisan political activities

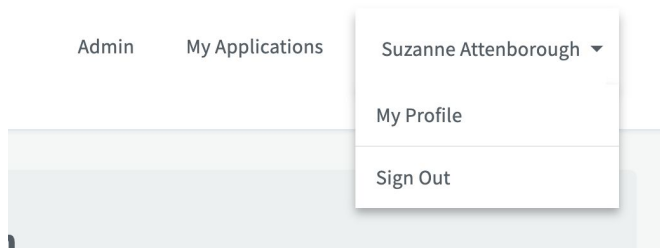
# PACF Grants Application Process: Nuts & Bolts

- Complete and submit online Grants Application
  - URL is on the PACF website and accessible from the homepage:  
<https://paloaltocommfund.org/pacf-grantees/grantee-application/>
- PACF sets up conversation time with PACF Team and Applicant ED
- Use [grants@paloaltocommfund.org](mailto:grants@paloaltocommfund.org) to ask questions and any grant or grant-related follow up

# PACF Grants Application Process: Nuts & Bolts

- Logging into the Application

- Be sure to enter the Organization name in your personal user profile
- Click on your name in the upper right, Click on My Profile, Fill in Organization Name

A screenshot of a user profile form. The form contains the following fields: 'Email' (suzanne\_attenborough@yahoo.com), 'Password', 'Confirm Password', 'First Name' (Suzanne), 'Last Name' (Attenborough), 'Organization/School' (Palo Alto Community Fund), and 'Preferred Language' (English). Each field has a red asterisk indicating it is required. The form is set against a light gray background with a vertical gray bar on the right side.

# PACF Grants Application Process: Nuts & Bolts

- Saving the application

- You may save and return to work on your application
- The program autosaves as you complete each page of the application and/or move backward or forward
- To save in between autosaves look for the small gray Save at the very bottom of the page directly to the right of the blue Next button.

- Preview the Application



# PACF Grants Application Process: Nuts & Bolts

- **Information you Need to Complete the Application**
  - Mission Statement
  - 501c3 Determination Letter from the IRS (or that of your fiscal sponsor)
  - Board of Director's List with names and affiliations
  - Most recently completed year end financial statements
  - Total organization budget and actuals for your current fiscal year
    - Show revenue and income projections for the entire year alongside year to date actual income and expenses
- **Additional Uploads - use the most recent of each if you produce them**
  - Annual Report
  - 990 (or 990-EZ; 990-N, etc.)
  - Audit or financial review report



# PACF Grants Application Process: Nuts & Bolts

- **Uploading Files- all files will be uploaded through Smarter Select**
  - File types that may be uploaded:
    - pdf
    - jpg
    - jpeg
    - Less common but accepted: gif, tiff, bmp, tif
- **Financial Information**
  - Please provide financial information for your most recently completed fiscal year
  - Please provide budget projections as well as actuals YTD for the full fiscal year in which you are currently operating

# PACF Grants Application Process: Nuts & Bolts

- **Areas of Focus**

- Please try to choose at least two from our list, preferably all 3
- There is no “right” answer to this question

- **Geographic Information/Locations Served**

- Total overall must equal or be greater than the 3 cities added together

- **FTE means Full Time Equivalent Paid Staff**

- If you have 3 people who work half time the FTE is 1.5
- If you have 3 people who work quarter time the FTE is .75

EVERYWHERE: In the first box below (Box A), enter the GRAND TOTAL served **ANNUALLY** in every location where you work

- For example, if your work extends up and down the entire Peninsula, list the grand total you serve annually in all parts of the Peninsula (even beyond the 3 cities where PACF works). If your work extends throughout the entire Bay Area, list the grand total you serve annually in all parts of the Bay Area. Etc.

BOX A--EVERYWHERE: Grand total served annually everywhere you work? \*

BOX B--PALO ALTO: Total served annually in Palo Alto? \*

BOX C--EAST PALO ALTO: Total served annually in East Palo Alto? \*

BOX D--MENLO PARK: Total served annually in Menlo Park? \*

PA/EPA/MP TOTAL: Total served annually in Palo Alto, East Palo Alto, and Menlo Park combined (*The number in Box E below is calculated automatically. It is the sum of Boxes B+C+D above. The sum below in Box E cannot be larger than the number you entered in Box A above, your "Everywhere Grand Total!"*)

# PACF Grants Application Process: Nuts & Bolts

- **Demographic Information**

- We are collecting Demographic Info on your Board and your paid staff
- Open and complete either an Excel spreadsheet or a Google sheet
- Be sure to retitle the spreadsheet with your organization name
- Save as a pdf and upload using the link in the application

# Conversations with PACF Team - Overview

- **Late January:** PACF will contact each organization's ED with details on how to schedule a time to speak with two members of PACF's grants review team
  - Note that it is important that we have your ED's contact information in the application
- We use **Calendly** to sign up for the 25 minute time slots
- **Feb 5th - 16th:** 25-minute meetings (via phone\*)

We will use a conference call service and send you the call-in number when your meeting time is confirmed.

*\*We strongly recommend no more than 2 participants from each organization attend the meeting*

# Conversations with PACF Team - Topics

- What are the **top priorities and/or opportunities** for your organization over the next 1-2 years?
- What are the biggest **challenges** facing your organization - funding or otherwise?
- How does your organization differentiate itself from similar organizations? For instance, **what is unique** about what you are doing, how you are doing it, and/or the community you serve?
  
- As needed: clarifying questions about your application
- If there is time: ideas/suggestions for nonfinancial resources that in a perfect world PACF could provide that would be valuable to your organization and the work you do

# PACF Grants Applications Process: What's Next

December 1- January 12

Grant Application Submission

January 24-28

PACF emails applicant EDs to set up conversation

February 5-16

Applicant Conversations with PACF

February- March

Evaluation Process

Before mid-May

Decision reached

# Questions & Answers

Email [grants@paloaltocommfund.org](mailto:grants@paloaltocommfund.org)

Suzanne Attenborough will be happy to answer any questions that come up as you work through your applications. Please use this email address for all grants related communications.

Thank you for joining us today!