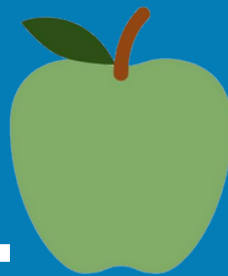




CORE GRANTS 101



A GUIDE TO SUCCESSFUL CORE GRANT SUBMISSION
FOR SOUTHERN ARIZONA NONPROFITS

CORE Grant 101 Guide

Thank you for your interest in a CORE Grant from the Community Foundation for Southern Arizona. Since 2017, CFSA has granted over \$4.7 million to 115 nonprofits in Southern Arizona through our CORE Grants Program. We know from experience – our own and that of other forward-looking foundations – that general operating support can quicken the arc of change, creating greater results in less time at lower cost. Through CORE Grants, CFSA provides nonprofits with the flexible working capital necessary to maximize their impact and improve the quality of life in our region.

Grounded in mutual trust and respect, CORE Grants provide flexible funding for organizations to use as they see fit to address emerging issues, boost salaries and benefits, invest in technology, or implement new communication and fundraising strategies, all leading to a healthier, innovative, and robust organization.

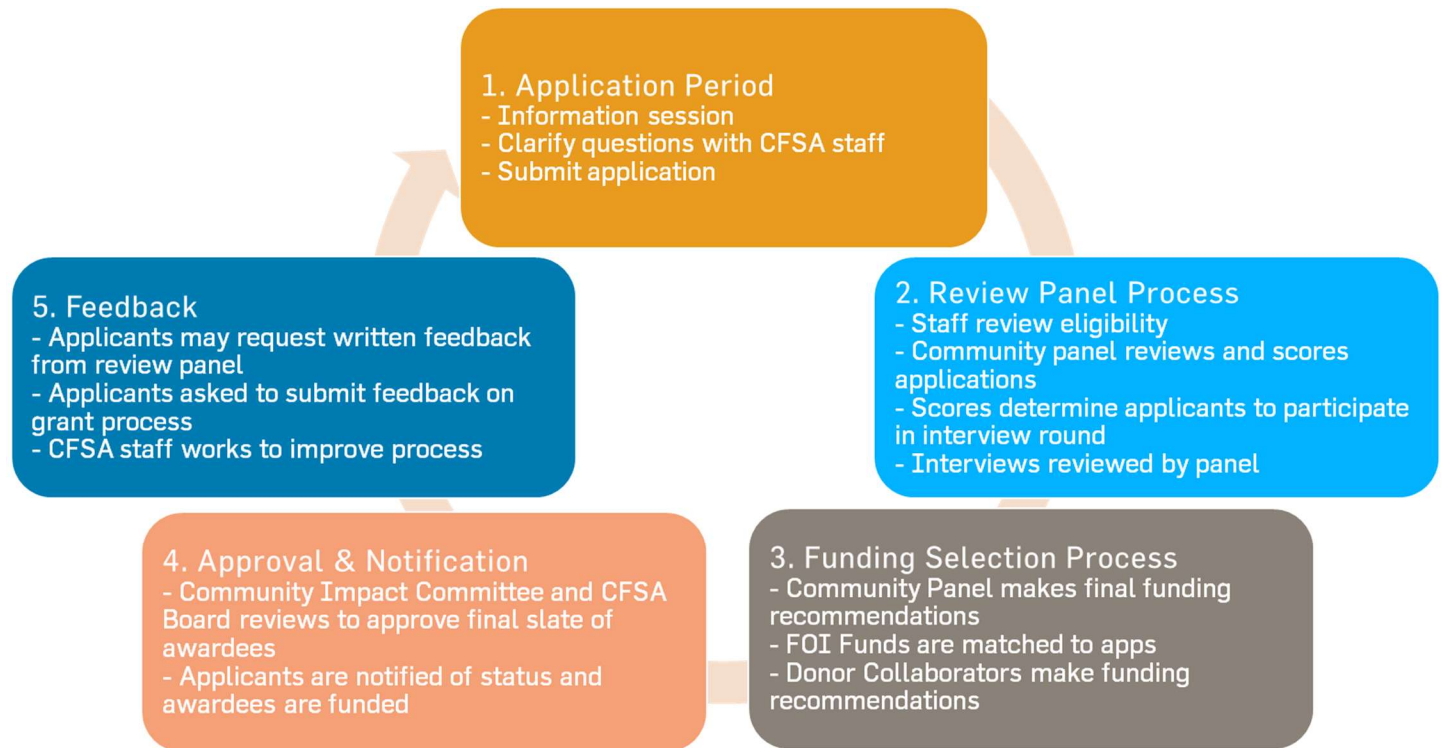
CORE 2024 Timeline

Please note that dates may change throughout the process to accommodate unforeseen circumstances. The Community Impact staff at the Community Foundation for Southern Arizona will always notify applicants via email of any updates regarding the CORE Grants process.

<u>Date</u>	<u>Time</u>	<u>Event</u>
11/6/2023	12:00 AM MST	CORE Application Opens
12/1/2023	5:00 PM MST	CORE Application Closes
12/22/2023	N/A	1st Round Finalists Notified
1/2024	N/A	Committee Begins Application Scoring
2/9/2024	N/A	2nd Round Finalists Notified
2/13/2024	9:00 AM	Calendly Scheduling for Interviews Opens
2/26/2024, 2/27/2024, 2/28/2024, 2/29/2024	Times TBD	Applicant Interviews
4/17/2024	N/A	CORE Grantees Notified/Final Notifications
5/15/2024	5:30 PM – 7:30 PM MST	CORE Grants Celebration
5/15/2024	N/A	CORE Grantee List Publicized

CORE Grants Process Overview

What does the CORE Grants Process entail for applicants?



1. Round 1: Staff screening and eligibility review (December 2023)

- After the application deadline, CFSA staff conduct an eligibility screening to ensure all applicants meet criteria and that applications are complete. You **may** be asked for clarifications on your application or financial documents during this round.
- Applicants who **do not meet criteria** or **fail to respond** with clarifications will be declined – all other applicants will be advanced to the next round.

2. Round 2: Application Scoring by Committee (January – February 2024)

- In this round, the applications are released to our CORE Grants Review Committee for scoring. Scores are averaged from multiple reviewers and based on CORE rubric.
- At the end of this round, the committee will meet to decide on finalists for Round 3.
- Applicants will be notified of their status by **February 9, 2024**.

3. Round 3: Applicant Interviews (March 2024)

- Finalists in this round will participate in 15-minute virtual interviews with the Community Impact Team. Committee members and donors will not be present during these interviews, but they will be recorded and will contribute to scoring.

- b. Round 3 finalists will have the opportunity to select from four available interview dates on **February 26 - 29, 2024**.
- c. During virtual interviews, applicants will be asked additional questions related to the CORE rubric. These are conversations, not presentations, and PowerPoints/external materials are not allowed.
- d. This is our opportunity to get to know you and your organization beyond the application and to hear what you envision for CORE funding.

4. Final Selections & Funding (April – May 2024)

- a. At the end of the interview round, the committee will meet once again to discuss the overall results of their scoring along with considerations of geographic service area, budget size, and focus area to ensure a diverse pool of grantees. They will then make final recommendations and assist CFSA with distributing its unrestricted funds.
- b. From the list of finalists presented by the CORE Grants Review committee, donor collaborators and our field of interest funds will also make their funding selections.
- c. Final notifications will be sent out on **April 17, 2024**, and the list of 2023 CORE Grantees will be made public on **May 15, 2024**.

CORE Eligibility Criteria

Organizations applying for these grants must meet all criteria listed below. Underneath the standard eligibility criteria listed here, you can find information regarding fiscal sponsors, university programs, and religious entities.

What makes my organization eligible to apply?

In Round 1, CFSA staff will make sure that your organization meets the following criteria to advance to the next round. If eligibility based on any of these points is not apparent from your application, staff will be in contact to collect verifying information.

- 1. Applicants must be a 501(c)3 in good standing and have been operating for at least 2 years.**
 - a. You will be asked to provide your EIN which will be used to verify this information.
 - b. In the application, organizations who were conducting programming before the acquisition of a 501(c)3 will have the opportunity to provide context on the nature of that work.
- 2. Applicants must be based in Southern Arizona.**
 - a. We welcome applicants from all counties south of the Gila River, including Cochise, Graham, Greenlee, Pima, Santa Cruz, Yuma, and some of Pinal County.
 - b. Statewide organizations serving Southern Arizona must have local leadership in the form of a board of directors or advisory committee, and local program management and accountability.
 - c. In the case of nationally sponsored organizations, no portion of the grant can be used to support the national, state, or regional entity.
- 3. The applicant must be current in all reporting to CFSA.**
 - a. We ask that applicants not have any outstanding reports due in any previous/current grant cycles with CFSA.
- 4. Organization must have a current annual budget between \$100K - \$2M.**
 - a. We will ask you to input your current fiscal year annual operating budget in the application.
 - b. Additionally, applicants will be asked to submit their most recently filed Form 990.

- c. Applicants will be asked to provide context within the application if their current annual operating budget varies greatly from the last reported Total Expenses (Line 18) in their most recently filed Form 990.

5. **CORE Grants will not be made to individuals, for-profit organizations, government entities, capital fund drives, agency endowments, debt reduction, individual schools, religious organizations for sectarian purposes, or pure sports teams.**

Continued Eligibility Questions

What if I want to apply using a fiscal sponsor?

We welcome organizations applying under a fiscal sponsor. Fiscal Sponsor must be a 501c3 in good standing and located in Southern Arizona. If you are applying using fiscal sponsorship, you will be asked to provide a letter or agreement confirming fiscal sponsorship, your fiscal sponsor's Form 990, and your organization's current annual operating budget in the Additional Documents section.

What if my organization is housed under a college or university foundation?

We welcome organizations to apply utilizing their university foundation as a fiscal sponsor. Your application will follow the same logistics as those for fiscal sponsorship. Applicant must meet all other eligibility requirements.

What if my organization is a religious entity providing community services?

If your organization is or operates out of a religious entity, your programming must be open to the public and cannot require statements of faith or membership within the religious organization or entity.

Awards made by the foundation's various grant panels support organizations that do not discriminate in their employment practices, volunteer opportunities or delivery of programs and services on the basis of Race, Religion, Gender or Gender Identity (including gender nonconformity and status as a transgender individual), Gender Expression, Sexual orientation, Age, Ancestry, Citizenship, Ethnicity, Familial Status, Socioeconomic Status (economic circumstances), Color, Creed, Sex (including pregnancy), Phases of Parenthood, National Origin, Marital Status, Veteran Status (past, current or prospective service in the armed forces), Genetic Information, Physical Characteristics or Appearance, Mental or Physical Disability, Any other status prohibited by applicable law.

Evaluation Rubric & Application Guidelines

CORE Grants are scored according to a rubric representative of the following CORE characteristics. Each section is scored based on overall alignment to CORE criteria and all sections are weighted evenly.

Community

Nonprofits play an integral role in their local community, have a keen awareness of its needs, and are continuously evolving and growing to meet those needs.

In this section, you will be asked the following questions:

Question 1: Please describe the role your organization plays in its surrounding community. How do you meet ever-changing community needs?	1800 characters
Question 2: Please tell us about any collaborations you have with other entities conducting this work and how these collaborations advance your mission or programming.	1800 characters
Question 3: In what ways has your organization been working toward inclusivity, diversity, equity, and accessibility for both your internal and external stakeholders? <u>For example, consider:</u> Listening sessions, internal work culture, access to programming, etc.	1800 characters
Question 4: In what ways is the makeup of your board and staff reflective of the community you serve?	1800 characters

Organizational Sustainability

Nonprofits have a business model that provides ongoing financial support for their organization. They have boards and staff that are skilled, diverse, and knowledgeable, and have shown longevity and a desire to move the organization forward to achieve the best results.

In this section, you will be asked the following questions:

Question 1: What is the structure and size of your organization's workforce (paid vs. volunteer, how many members, number of etc.) How do staff and/or volunteers and board members contribute to your overall mission?	1800 characters
Question 2: What systems does your organization have in place to ensure good governance and stable leadership?	1800 characters

Question 3: How does your organization work to retain and support employees and develop their skills? <u>For example, consider:</u> Professional development opportunities, wellness, career advancement, etc.	1800 characters
Question 4: Please describe the different ways in which your organization currently raises funds and how those funds impact your organization's ability to conduct its work.	1800 characters

Within this section, you will also be asked to provide your most recently filed Form 990 for your organization. **If you are applying using fiscal sponsorship**, you will be asked to provide a letter or agreement confirming fiscal sponsorship, your fiscal sponsor's Form 990, and your organization's current annual operating budget in the Additional Documents section.

Results

Nonprofits utilize different methods of evaluation and data collection to inform decision-making as well as develop appropriate services to the community. This may also include utilizing data to expand organizational knowledge of advocacy issues (if relevant).

In this section, you will be asked the following questions:

Question 1: In what ways do you conduct evaluations of your organization's programmatic work and/or gather data that informs your organization's mission? If you involve stakeholders in your evaluation process, are they compensated?	2200 characters
Question 2: How do you utilize the evaluation methods and data discussed in the previous question to influence decision-making for your organization?	1800 characters

Effective Programs

Nonprofits can clearly speak to the importance of their missions and programs and strategically align their programmatic or advocacy work with the larger good of the communities that they serve.

In this section, you will be asked the following questions:

Question 1: Please describe your organization's method of conducting its work/service (whether through traditional programming or advocacy) and how this work impacts the larger good of the communities that you serve.	2000 characters
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Question 2: Please share one highlight or story about the impact your programming has made on an individual, family, or the Southern Arizona community at large.	1800 characters
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Continued Application Questions

How much can I request and how long will the grant period be?

We accept grant requests between \$10,000 and \$30,000 from qualified nonprofit organizations. We **do not** give recommendations on how much you should request. No one knows what your organization needs better than you, so we recommend that you **ask for what you need** within the grant range. Nonprofits are not penalized for asking for “too much” in this grant round. Remember: CORE grants are unrestricted grants. **CORE grant periods are for one year in duration.**

Can I reapply even though I applied last year?

Organizations may receive (**be awarded**) a CORE grant for up to 3 consecutive years. Any organization that receives 3 consecutive CORE grants must wait for at least 1 year before reapplying and must meet all other eligibility requirements at the time of reapplication. If you have not been awarded 3 consecutive grants, you may reapply as many times as you'd like to.

What documents will I have to submit?

The documents listed below are requirements for a complete CORE Grant application. **Please convert all documents to separate PDFs before uploading.**

1. Your organization's most recently filed **Form 990**
2. If Fiscally Sponsored:
 - a. Your fiscal sponsor's Form 990
 - b. Letter or agreement confirming fiscal sponsorship
 - c. Your organization's current annual operating budget

Final Tips

1. Save and exit any other application drafts that you may have open in Common Grant Application before trying to edit your CORE Grant application.
2. On deadline day, double check to make sure you hit “Submit” and be sure to submit before the 5:00 PM MST deadline. By **December 4, 2023**, you will receive confirmation of your submission from a CFSA team member.
3. If you are experiencing any issues with the platform, uploading documents, or submitting, please give us a call or email as soon as possible.

4. Feel free to work on your application offline or using a Word document and then add your answers to your application once you're ready to submit – but be mindful of character count.
5. If you or an organization you know of need the CORE application translated in Spanish, please let us know so that we can send you a PDF copy.
6. In Common Grant Application, please use the “help boxes” marked with a blue question mark box and sublabels to guide you.
7. **Please convert all documents to PDF before uploading them to your application to ensure your formatting doesn't change.**

If you have any questions about the application, please give our team a call at **520-770-0800** or email community@cfsaz.org.

Selections & Funding

There are many different levels of review and input that go into the CORE Grant final funding selections. You can learn more about how award decisions are made below.

CORE Grants Review Committee

To ensure that CORE funding reflects community priorities and the annual pool of applicants, CFSA grants committees are structured to reflect the region they serve. Typically, our CORE grants committee ranges anywhere from 15-25 reviewers.

We seek volunteers from many different backgrounds including nonprofit, for-profit, government, and nontraditional backgrounds who show a clear commitment to our grants process as well as inclusion, diversity, equity, and access.

Each year, CFSA makes a public call for volunteers to expand our recruitment for committee members and ensure better overall representation of the Southern Arizona community. Nonprofits who are not actively applying for a grant within that application cycle may have staff volunteer to serve on a CFSA grant, award, or scholarship committee through our public call for volunteers. If you or someone you know may be interested in participating in a grant review process, please reach out to our team!

The CORE grants committee scores according to the “C.O.R.E” rubric and takes other factors into consideration for decision making to ensure a diverse pool of finalists, representative of both the application pool as well as the Southern Arizona community. These factors include:

- **Geographic service area**
- **Nonprofit budget size**
- **Nonprofit focus area**

CORE Donor Collaborators

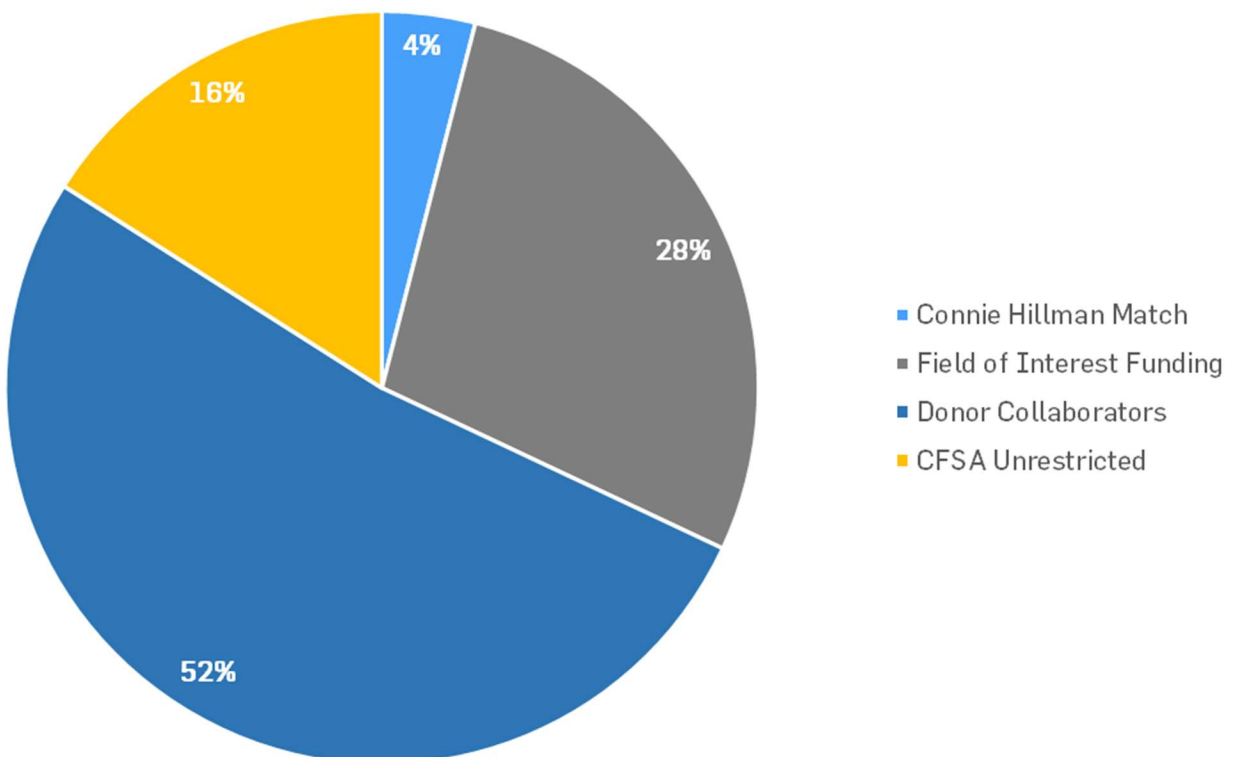
Donor Collaborators are comprised of other foundations, Donor Advised Fund-holders and other donors who want to invest in your organization. Collaborators utilize CFSA's processes, applications, and the Grants Review Committee expertise to assist with their grantmaking decisions.

How is CORE funded?

CFSA's 2024 CORE Grants are made possible with support from CFSA's Unrestricted Funds, CFSA's Field of Interest Funds, our generous CORE Donor Collaborators, and a match from the Connie Hillman Family Foundation.

The availability of unrestricted funding, the number of donor collaborators who join each year, and market performance of funds can all influence the availability of total grant funding from year to year. CFSA is committed to seeing this grant program continue to grow, evolve, and reach even more deserving organizations for years to come by continuing to grow our donor collaborator program.

Below is a breakdown of funding sources for CORE 2023:



Final Selections & Funding

The committee scores during the application round and after viewing interviews. At the end of the interview round, the committee will meet once again to discuss the overall results of their scoring, make final recommendations, and assist CFSA with distributing its unrestricted funds.

From the list of finalists presented by the CORE Grants Review committee, donor collaborators and our field of interest funds will make their funding selections.

Final notifications will be sent out on **April 17th** and the list of 2024 CORE Grantees will be made public on **May 15th**.

What happens if I am not selected for a CORE grant?

In the years since its inception, CORE has become an increasingly large and increasingly competitive grant program. Not being chosen for a CORE grant is not a reflection of your organization's impact and importance in the Southern Arizona community. If you are not selected for this round, we encourage you to apply again for the next cycle.

The CFSA staff and our donor collaborators trust our grants committee to make recommendations based on the rubric they're provided as well as the overall pool of applicants. When applying, please pay close attention to the criteria and how they connect to each question within the application.

We aim to ensure that every single scored application receives constructive written feedback from the assigned group of reviewers. We will make this feedback available to all applicants upon request (regardless of the grant outcome) via email after the completion of the grant round on **May 15th**. Because decisions are ultimately made by our grants committee and due to the limited capacity of our staff, we **do not** provide feedback calls.

Tell Us About Your Experience!

Hearing and acting on grantee feedback provides an opportunity for funders to be more inclusive and equitable. Following this year's CORE grant round, we will send out a feedback survey to all CORE grant applicants that will help us to gain more insight on how we can improve our processes and your grant application experience.

Your feedback is monumental to our work as staff and we are grateful for your continued honesty and transparency. It is our goal to approach our grant processes from a trust-based philanthropy lens and nonprofits like yours are instrumental to that effort.

Questions?

We know that any grant process can be stressful and taxing on an organization and its employees. We encourage you to reach out to any member of our staff with questions regarding the application via phone or email. Our team is here to help, and we wish you the best of luck with the entire CORE Grants experience.

If you have any questions about the application, please give our team a call at **520-770-0800** or email community@cfsaz.org.

