

## Introduction

Santa Cruz County, Arizona is dedicating approximately \$500,000 of its federal American Rescue Plan Act of 2021 Direct Assistance for Local Governments funding toward a nonprofit competitive grants program. The goal is to help the local 501c3 and 501c6 nonprofit community expand their services and reach so that Santa Cruz County employers, employees and artists (ages 18 and older) can improve their ability to build and preserve financial wealth.

The Santa Cruz County Nonprofit Grants for Community Financial Capacity will provide grants to nonprofits to offer classes, training and services for employers and employees so they can mitigate the negative economic impacts experienced from the pandemic. Organizations providing support services for local entrepreneurs (including artists), community members and small businesses are welcome. The program intent is to help persons in Santa Cruz County build a financial cushion or develop their skills to improve their long-term financial position. Through this program, nonprofits can offer a wide range of supports to develop financial stability, such as, but not limited to:

- Developing training or services that will help employees, employers or entrepreneurs build their business skills
- Helping employers and employees build a savings cushion, establish credit or develop an emergency savings strategy
- Helping community members gain industry-specific training to enhance their employability or wages
- Helping artists with career advancement and development, such as through coursework or creation of arts districts that helps them build income
- Securing free tax filing assistance and helping employees apply the refund toward a long-term asset (like a business or continuing education)
- Helping individuals who lack benefits, such as affordable health insurance, childcare, or food assistance supports, apply for and use them, as a way to better maximize their income
- Assisting employers with insurance premium selection and developing affordable payment strategies

Approximately 11-20 grants are expected to be awarded on a competitive basis, prioritizing nonprofit organizations serving the following sectors:

- Retail and services
- Arts
- Travel
- Tourism
- Hospitality
- Small businesses (employing 30 employees or less)
- Emerging or existing entrepreneurs who were unable to access the Paycheck Protection Program and related SBA programs
- Other – Organizations serving community members who have been impacted by Covid that are gaining new workforce skills/education to go back to work

Organizations that apply are **strongly** encouraged to partner with at least one additional nonprofit organization and identify how they will jointly provide services. Each partnering organization can apply separately for their own \$25,000-\$45,000 request. Organizations based outside Santa Cruz County can partner with ones inside Santa Cruz County as long as funding is spent within Santa Cruz County\*\*

\*\*The intent of allowing nonprofit applicants based outside of Santa Cruz County to apply is to build local capacity for services or programs. Nonprofits based outside of Santa Cruz County must spend their entire services budget request on in-county services: they can spend a portion of administrative or staffing costs

outside the county if the project budget justifies how this develops capacity to build in-county services.

Guidelines & Basic Eligibility

The Nonprofit Financial Capacity Grant Program will make grants of **\$25,000-\$45,000** to nonprofit organizations (**501c3 and 501c6**) serving Santa Cruz County. Grant period is one year in duration. Grants can be used for programmatic and operating expenses along with capital (such as curriculum or equipment) to provide the community with financial asset building programs.

We are not able to fund individuals or businesses directly, labor unions or other types of organizations. If you are an individual or business who is seeking support, the county will be making available a forgivable loan fund application in late April or May 2022, information will be available on the Community Foundation of Southern Arizona website.

Please refer to [Fact Sheet](#) for more information.

Eligibility:

- Santa Cruz County 501c3 and 501c6 organizations that seek to build economic opportunity for low and moderate income residents of Santa Cruz County
- Nonprofit organizations based outside of Santa Cruz County\*\* that partner with, or serve as a fiscal sponsor to, a Santa Cruz County organization (which could be a 501c3 status or not legally incorporated)
- Ineligible application include: Nonprofit organizations unable or unwilling to comply with federal monitoring requirements. Please see attached draft contract for monitoring required. Nonprofit organizations based outside of Santa Cruz County that do not partner with a Santa Cruz County organization on their application
- Organizations must provide new or expanded services, training or similar supports to employers, employees or entrepreneurs living in Santa Cruz County.
- The organization must have local leadership in the form of a board of directors, or advisory committee, local financial support and local program management and accountability.
- CFSA honors the rich diversity of our community and promotes equal opportunities for all people. Awards made by CFSA's grant panels support organizations that do not discriminate in their employment practices, volunteer opportunities, or delivery of programs and services on 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.
- Applicants will be required to acknowledge and agree that the grant funds will be used only towards expenses that are incurred for programs in the grant application. Applicants must agree to submit reporting and receipts of all expenditures to Santa Cruz County.
- Applicants shall further acknowledge that if funds are not expended in a consistent manner, the funds are subject to recoupment.
- Organizations that apply are strongly encouraged to partner with at least one additional nonprofit organization and identify how they will jointly provide services. Partnering organizations should be prepared to share client data/reporting with each other. This grant will provide strategic planning and reporting support to help organizations that do so.
- Organizations may be requested to collect and share information about program participants. Dedicated staff time for program reporting and potential auditing,

which is required for using federal funds, can be accounted for in the budget.

- Those awarded funds will receive help at no cost from Local First Arizona in setting up a quarterly reporting system to comply with federal reporting requirements. Grantees will also be able to receive assistance with strategic planning at no cost.

Required Organization Documents:

- Upload current Profit & Loss Statement Against Budget
  - Upload current YTD Balance Sheet
  - Upload Project budget summary for Request (use template provided)
- Provide a summary of expenses for the Financial Asset Building services that you intend to provide, with a description of additional resources you have to support the program (other grants, and cash or in-kind funds). Note\* Please remember you can only apply for funds to expand or offer new services; organizations that double count benefits with two or more sources of funds for the same service are engaging in a form of fraud. Duplication of, or double counting benefits, occurs when an entity receives assistance from multiple sources for the same purpose, and then bills more than one funding source for the same cost.
- 501c3 or 501c6 documentation

Timeline

Proposal will be accepted starting **February 3, 2022** and will be due **March 25, 2022, 5pm MST**. Notification of awards will occur by late March or April. All grant awards will be processed directly through Santa Cruz County and if accepted, organizations will need to provide necessary documentation to Santa Cruz County. Applications will stay on file and will be considered until funding is no longer available.

A virtual information session covering this opportunity and application is scheduled for February 18, 2022 at 9am MST via Zoom. [Register Here](#)

Contact and Support with the Application

Local First Arizona is providing free grant writing assistance to organizations that need support submitting their applications. If your organization is interested in this support, please contact [katie@localfirstaz.com](mailto:katie@localfirstaz.com)

For Inquires about the grant program: Please call Jenni Moreno at 520-903-7022

For assistance with the online application please email: Jeaiza Quinones Ivory, [jqivory@cfsaz.org](mailto:jqivory@cfsaz.org)

\*Si necesita ayuda para completar en español, envíe un correo electrónico a [angie.donelson@gmail.com](mailto:angie.donelson@gmail.com)

## Organization Information

### Primary Contact

<b>Organization Name*:</b> (Max. Characters: 300)	
<b>Address 1*:</b> (Max. Characters: 50)	
<b>Address 2:</b> (Max. Characters: 50)	
<b>City*:</b> (Max. Characters: 50)	
<b>State*:</b>	
<b>ZIP Code*:</b> (Max. Characters: 300)	
<b>Phone*:</b> (Max. Characters: 20)	
<b>Website if available:</b> (Max. Characters: 255)	
<b>Physical Location(s) if different from mailing address:</b> (Max. Characters: 300)	
<b>First Name (of executive director or chair of the board)*:</b> (Max. Characters: 20)	
<b>Last Name*:</b> (Max. Characters: 30)	
<b>Contact Title*:</b> (Max. Characters: 100)	
<b>Phone:</b> (Max. Characters: 20)	If different than above
<b>Email*:</b> (Max. Characters: 300)	
<b>United States Tax ID #*:</b> (Max. Characters: 11)	
<b>Year organization was founded*:</b> (Max. Characters: 4)	In what year did you become a legally established 501c3 or 501c6 organization?
<b>National Taxonomy of Exempt Entities (NTEE) Classification*:</b> (Max. Characters: 3)	Please enter the NTEE code that best fits your classification. For a full list of codes, please <a href="#">click here</a> . You can only enter the 3 digit code in this field. For example, enter "C27" for "recycling".
<b>Please list the counties that your organization serves*:</b>	

(Max. Characters: 300)	
What zip codes do you currently serve (with your clients)? *: (Max. Characters: 300)	
How many unduplicated individuals does your organization serve annually? *:	
Number of unduplicated individuals based in Santa Cruz County *: (Max. Characters: 300)	
Number of employees within your organization*: (Max. Characters: 300)	
Number of employees within your organization based in Santa Cruz County*: (Max. Characters: 300)	
Federal funding*:	Has your organization currently or have been the recipient of federal funding in the past 5 years?
If yes, please list all sources of federal funding: (Max. Characters: 500)	
% Population*:	<p>Please list the % population served by organization</p> <p>Native American and/or Alaska Native:</p> <p>Black and/or African American:</p> <p>Latino/a/x:</p> <p>Asian and/or Pacific Islander:</p> <p>White:</p> <p>Other:</p> <p>Total (click Save to update):</p>
Prefer to not answer:	
Organization's Mission Statement *: (Max. Characters: 500)	
Project name*: (Max. Characters: 500)	
Brief Description of Organization, Programs Offered, and History *: (Max. Characters: 1000)	
Current Budget*:	

<b>(Max. Characters: 50)</b>	
<b>Amount Requested*:</b> <b>(Max. Characters: 10)</b>	Range is \$25,000-\$45,000

## Financial & Organizational Documents

<b>Current accounting software/or financial management process*:</b> <b>(Max. Characters: 1000)</b>	Please describe your process and any programs used for keeping accurate financial records.
<b>Has your organization ever had audited financial statements? *:</b>	
<b>Audited financial statements :</b> <b>(Max. Characters: 300)</b>	Did your organization prepare audited financial statements for the most recent fiscal year? If not, list year.

### Upload Documents Here

Required Organization Documents

- Upload current Profit & Loss Statement Against Budget
- Upload current YTD Balance Sheet
- Upload Project budget summary for Request: Please use this [TEMPLATE](#) for more information.

Provide a summary of expenses for the Financial Asset Building services that you intend to provide, with a description of additional resources you have to support the program (other grants, and cash or in-kind funds). Note\* Please remember you can only apply for funds to expand or offer new services; organizations that double count benefits with two or more sources of funds for the same service are engaging in a form of fraud. Duplication of, or double counting benefits, occurs when an entity receives assistance from multiple sources for the same purpose and then bills more than one funding source for the same cost.

- 501c3 or 501c6 documentation

Type		Name	Size	Updated
Current Profit and Loss Statement Against Budget *				
<b>Notes</b>				
Current Balance Sheet *				
<b>Notes</b>				
Project budget summary for Request *				
<b>Notes</b>				

Type		Name	Size	Updated
501c3 or 501c6 documentation *				
<b>Notes</b>				



## Narrative

<p><b>Project/program activity*:</b> (Max. Characters: 1500)</p>	<p>Describe the project / program activity proposed for the goal of building financial assets. How will you provide these services, and how will they help mitigate the negative economic impacts of COVID?</p>
<p><b>Partnerships*:</b> (Max. Characters: 1000)</p>	<p>Name any other organizations you are partnering with that are applying for this funding. How will you partner?</p>
<p><b>What target populations do you anticipate reaching with the grant? *:</b> (Max. Characters: 1000)</p>	
<p><b>Please list any partners on this project and if applying to this grant? *:</b> (Max. Characters: 500)</p>	
<p><b>If partnering with other entities to provide this project, please describe the role of each partner.:</b> (Max. Characters: 1500)</p>	
<p><b>How will you document the impact of the services for the clients you serve? *:</b> (Max. Characters: 1500)</p>	<p>(Organizations that are awarded funding will be provided additional assistance in tracking client progress).</p>

## Signature and Submission

<p><b>Non-Discrimination :</b></p>	<p>Our organization does 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.</p>
<p><b>Staff/ Check Box*:</b></p>	<p>By checking the box below, I acknowledge that I have read this application and approve its submission.</p>
<p><b>Staff Name/Title*: (Max. Characters: 300)</b></p>	<p>Please enter the name and title of the staff person who is acknowledging submission. If no staff, then enter name and title (if applicable) of an appropriate volunteer.</p>
<p><b>Board Member Check Box*:</b></p>	<p>By checking the box below, I acknowledge that I have read this application and approve its submission.</p>
<p><b>Board Member Name/Title*: (Max. Characters: 300)</b></p>	<p>Please enter the name and title (if applicable) of the Board member who is acknowledging submission. If a Board member signed as staff, secure the signature of another Board Member.</p>
<p><b>Approve Submission*:</b></p>	<p>By checking the box below, I acknowledge that I have read this application and approve its submission.</p>