



# CORE GRANTS 101

A GUIDE FOR DONOR COLLABORATORS

## Community Foundation for Southern Arizona CORE Grants 2023

Welcome Collaborator!

On behalf of the entire Community Foundation for Southern Arizona team we'd like to thank you for partnering with us to be a CORE Grants Collaborator this year.

Each year we have the exciting task of reviewing applications and meeting with dozens of amazing nonprofits from throughout the southern Arizona region. At the end of this application process, a group of well-deserved nonprofits will be selected to receive unrestricted funding in the form of grants between \$10,000 - \$30,000. This process would not be possible without the work of our donor collaborators.

Please take a moment to read this packet in its entirety. We've created it to help prepare you for the journey and to help answer some frequently asked questions about this grant process. In this packet you'll find:

- CORE 2023 Collaborator Timeline/Schedule of Events
- Your Collaborator To-Do List (**please review and complete!**)
- Community Foundation for Southern Arizona Summary
- CORE Grants Summary
- Collaborator & Review Committee Makeup Summary
- Implicit Bias & Grantmaking Myths

If you do still have any questions about CORE Grants, they will be answered at our **CORE Grants Collaborator Committee Training on January 5<sup>th</sup>, 2023 at 4:30 PM via Zoom.**

Thank you again and we look forward to working with you!

Philanthropy & Community Investments Team  
Community Foundation for Southern Arizona

## Review To-Do List & CORE 2023 Timeline

We look forward to having you take part in our CORE Collaborator Program this year. In order to help us prepare for this process, we ask that you review the check list below to ensure we have all of the information that we need.

- Contact Information
- CFSA Conflict of Interest Policy ([Sign & Submit Here](#))
- CFSA Confidentiality Policy ([Sign & Submit Here](#))
- Accept Calendar invites/holds for CORE 2023 (Will be sent via email)

### Core 2023 Timeline

<u>Date</u>	<u>Time</u>	<u>Event</u>	<u>Who?</u>
November 7 <sup>st</sup>	12:00 AM	CORE Application Opens	CFSA Staff
December 2 <sup>nd</sup>	5:00 PM	CORE Application Closes	CFSA Staff
December 6 <sup>th</sup> – January 5 <sup>th</sup>	N/A	Application Eligibility Review	CFSA Staff
January 5 <sup>th</sup>	4:30pm-6:30 PM	CORE Collaborator Training Zoom	Collaborator & Staff
January 5 <sup>th</sup>	End of Day	Applications Released Online to View *paper & pdf by request	CFSA Staff
February 10 <sup>th</sup>	End of Day	First Round Scores from Committee Available	CFSA Staff
March 9 <sup>th</sup>	End of Day	Applicant Videos Released to Collaborators	
March 23 <sup>rd</sup>	End of Day	Final Scores from Community Review Committee Available	CFSA Staff
March 29 <sup>th</sup>	End of Day	Community Review Committee Final Recommendations	CFSA Staff
March 29 <sup>th</sup>	End of Day	Donor Collaborators Decision Deadline	CORE Donor Collaborators
April 7 <sup>th</sup>	All Day	CORE Grantees Notified	CFSA Staff
May 4 <sup>th</sup>	9:00-11:00 AM	CORE Grants Awards Ceremony	All

## About The Community Foundation for Southern Arizona (CFSA)

The Community Foundation for Southern Arizona connects donors to the causes they care about, serving as a vital link between philanthropy and the community's needs. CFSA is a hub for individuals, families, businesses, and nonprofit organizations that care about Southern Arizona.

### Our Purpose:

To create an equitable and vibrant community for all Southern Arizonans by connecting donors to the causes they care about, now and forever.

### Our Values:

- Collaborative, Innovative, and Effective Leadership
- Integrity
- Stewardship and Service
- Diversity, Equity, and Inclusion

## CFSA Structure

### Supporting Organizations

What is it?

- SO's are perpetual, separate legal entities that support the mission of the parent organization, CFSA.

### Programs

What is it?

- An initiative promotes greater philanthropy among a particular group and is led by an advisory committee. The primary activities of these initiatives is grant making and asset building.

### Fund Types

- Individual contracts or will appointments.

### Geographic Affiliates

What is it?

- Geographic affiliates are a component fund (or collection of component funds), established within or by the community foundation, serving a defined geographic region and led by a local advisory group.

### Initiatives

What is it?

- Civic leadership activities that address specific market need or gap.
- Improve Community – Inspire donor to support community

## CORE Grants 101

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.

CFSA developed CORE Grants in 2016 to achieve greater impact through our grantmaking. 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.

In 2022, CFSA awarded a historic \$1,119,500 in unrestricted CORE Grants to 55 local nonprofit organizations in Southern Arizona – the largest single grant round in CFSA’s 42-year history. 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 Grants are scored according to a rubric representative of the following CORE characteristics:

**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.

**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.

**Results:** Nonprofits utilize different methods of evaluation and information-gathering to inform decision-making and organizational improvement as well as develop appropriate services to the community OR expand organizational knowledge of advocacy issues (if relevant.)

**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.



## CORE Collaborators

We have heard a clear desire from CFSA donors like you for more opportunities to engage with the Foundation and the exceptional nonprofits making a difference in Southern Arizona. In response, CFSA initiated the CORE Collaborator Program that allows you to partner with CFSA and other donors in the community to learn about and support high-impact nonprofits.

As a CORE Collaborator, you'll have the opportunity to leverage your charitable giving to make a greater impact. Through the CORE Grants process, you will hear firsthand from staff members about current needs and priorities in the community, learn about critical nonprofits providing high-quality services, and meet donors who share your dedication and commitment.

### How Do CORE Collaborators Make Decisions?

Collaborators are the primary decision makers for the funds they have contributed. CORE collaborators utilize our grantmaking processes to select their grantees. Many are Donor Advised Fund holders, but some are external donors and foundations who want the peace of mind knowing that CFSA is doing the screening and due diligence to help them make good decisions.

Some CORE Collaborators are very engaged in the process, reading every application, and watching virtual site visits. Some donors have CFSA prepare smaller curated docket of nonprofits in their interest area. Finally, others just look to the community review committee to select their grantees. Each CORE grant is between \$10,000-\$30,000 and we can combine funds from multiple collaborators and CFSA funds to meet this minimum.

### What should I expect as a Collaborators?

As a CORE Collaborator you can be engaged at your own pace. CFSA does all the heavy lifting during the process and we strive to make the experience as easy as possible for you. First, CFSA receives all applications, our staff screen for eligibility to make sure they meet requirements and are complete. Then we pass all applications to our community review panel who score using a numerical rubric to rank on CORE values. At the same time, the CORE Collaborators review the applications at their leisure. The first round of scored data is then provided CORE Collaborators. The committee review panel then meets again to decide who they would like to have present for a virtual site visit. Nonprofits then prepare a video with staff assistance to share with the review committee and donors. A final score based on the application and presentation is then given to Collaborators. Lastly, staff work with CORE Collaborators to select their grantees.

### What Makes A Good CORE Collaborator?

1. Respects the view of others
2. Maintains confidentiality
3. Understand the power of collective impact and collective grantmaking
4. Understands and acknowledges their potential for implicit bias in the review process and works against it.
5. Understands CORE program functions including review of applications and application items
6. Stays informed about what is going on in the community and asks questions, requests information from staff as needed

## Community Grant Reviewers

**Committee Makeup:** 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. We seek volunteers from both nonprofit and nontraditional backgrounds who show a clear commitment to our grants process as well as inclusion, diversity, equity, and access. Our CORE grants committee assists with the evaluation and scoring of eligible CORE grant applications. Additionally, this committee participates in several selection meetings along with CORE grant presentations to assist with determining our final list of CORE grantees.

### How Do Grant Reviewers Help Make Decisions?

CORE Grantees are chosen using a number of factors:

- First, reviewers evaluate and score CORE Grant applications using our Common Grant Application platform.
- Next, reviewers meet as a group to discuss the results of that scoring and discuss how those results reflect the data seen in the applications received. As a group, reviewers may advocate to advance groups in areas of funding interest that are not represented in the pool of higher scoring applications.
- During the second round of evaluations, the committee will sit for 15-minute presentations from applicants and score those presentations.
- Finally, the reviewers will attend one last meeting as a group to discuss the final list of CORE Grantees based on scoring and other factors.

### What Makes A Good CORE Grant Reviewer?

1. Respects the view of others
2. Maintains confidentiality
3. Is timely, thoughtful, and complete in reviewing grants and attends all meeting as assigned.
4. Understands and acknowledges their potential for implicit bias in the review process and works against it.
5. Acts in the best interest of the foundation by maintaining professional conduct within and outside of the grant review process.
6. Understands CORE program functions including review of applications and application items
7. Stays informed about what is going on in the community and asks questions, requests information from staff as needed, and actively participates in and takes responsibility for their review.

## Grantmaking Myths and Implicit Bias

### What Is Implicit Bias?

Thoughts and feelings are “implicit” if we are unaware of them or mistaken about their nature. We have a bias when, rather than being neutral, we have a preference for (or aversion to) a person or group of people. Thus, we use the term “implicit bias” to describe when we have attitudes towards people or associate stereotypes with them without our conscious knowledge.

### How Does This Apply To Grantmaking?

Implicit bias can affect how you may review and prioritize grant applications. Where an organization is located, their grant writing skill, the communities they serve and other factors may play a factor in your evaluation if you do or don't identify with them. Here are a few recommended strategies to alleviate implicit bias according to the [National Committee for Responsive Philanthropy](#):

- **Doubt objectivity:** Seeing yourself as objective actually tends to increase the role of implicit bias; teaching people about nonconscious thought processes ultimately allows us to guard against biased evaluations.
- **Increase motivation to be fair:** Seeking fairness, rather than being driven by fear of external judgment, tends to decrease biased actions.



- **Improve conditions of decision-making:** Implicit biases are a function of automaticity. Engaging in mindful, deliberate processing prevents our implicit biases from kicking in and determining our behaviors.
- **Count:** Implicitly biased behavior is best detected by using data to determine whether certain patterns of behavior lead to racially disparate outcomes. Once one is aware of such a link, it is then possible to consider whether the outcomes are linked to bias.

We will discuss implicit bias and how it relates to grantmaking in more detail during the committee training. Until then here are some articles you may find interesting:

- [Implicit Bias and Its Role In Philanthropy and Grantmaking](#)
- [Making People Aware Of Their Implicit Biases Doesn't Usually Change Minds](#)
- [Checking Your Blind Spot: Ways To Find and Fix Unconscious Bias](#)



## **Grantmaking Myths**

**Personal Stories are always the most powerful. It doesn't matter if the organization measures outcomes or collect data as long as they have stories that can touch your heart.**

- The strongest case is to present stories but back it up with data
- The data should be from respected resources
- Getting data on outcome and impact is important to understand success of program/org and if it is "worth" supporting- How many people do you serve? How have their lives have been changed?
- Long-term data is great whenever possible.
- Data generated by the organizations is important
- Stories are important to connect people to other people's experiences
- We are an institutional funder so it has to be data driven because we are accountable to donors and why we made certain decisions.

**A lower "overhead" cost/percentage is always better.**

- Why should non-profits be held to different standard than for profit groups?
- If you are having low overhead costs, but you are not effective, what is the point?
- It encourages lying about expenses or taking from different programs
- It encourages exploitation of non-profits staff- i.e. they are not paid fair market wages.
- You need technology and smart people to generate data so you need overhead
- These are infrastructure costs. So using the term "overhead" makes it sound that it is fringe benefits.
- There are different ways to show these costs- circles within circles instead of pie charts.

**Organizations that have had a financial surplus in recent years don't need our money.**

- Organizations with a financial surplus demonstrate good financial management.
- It is not a good practice for funders to punish an organization for being successful at raising funds.
- Grants to these organizations can provide an opportunity to start new programs or expand existing programs
- The surpluses may be restricted and they may not have unrestricted funds to try new things or have the flexibility to meet unplanned challenges

## Questions?

Please don't hesitate to contact us with questions that may come up at any time during this process.  
Thank you again for volunteering your time!



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