SAN BRUNO
Community Foundation

Memorandum

DATE: **October 7, 2024**

TO: **Community Grants Fund Review Panelists**

FROM: **Jessica Carrillo, Program Manager**
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SUBJECT: **Grant Application Review Process**

Thank you for volunteering to assist with the 2024-2025 Community Grants Fund review process. We greatly appreciate the time and thought that you will dedicate in helping us select this year's Community Grants Fund recipients. In turn, we hope you find your service on the Review Panel to be an interesting and rewarding experience.

I. Community Grants Fund Program Overview

As you may know, the San Bruno Community Foundation created the Community Grants Fund in 2016, and this is the eighth iteration of this responsive grantmaking program. Its purpose is to allow local community groups the opportunity to apply for grant funding to support new or existing programs that benefit the San Bruno community in one of the Foundation's 11 focus areas.

A. Timeline

The Community Grants Fund operates annually. The program is funded with $300,000 ($200,000 in SBCF funds; $100,000 contributed by YouTube/Google.org for the seventh year), operating on the following schedule:

- July 1, 2024: Program launched and application available at www.sbcf.org
- August and September 2024: SBCF held two Grant Workshops via Zoom
- September 18, 2024: Application deadline
- October-November 2024: Review process
- December 4, 2024: Grant awards approved by SBCF Board of Directors
- December 2024-February 2025: Grant awards distributed
- 2025 Calendar Year: Funding period

B. Applicant Eligibility

The Community Grants Fund is generally open to the following types of organizations that engage in activities to benefit the San Bruno community:

- 501(c)(3)[1] public charities
- 501(c)(4), 501(c)(5), and 501(c)(6) organizations that meet the public support tests described in 509(a)(2)
- Governmental units that are described in 170(b)(1)(A)

Notwithstanding the list above, entities **not** eligible for Foundation funding include supporting organizations, testing for public safety organizations, political organizations, organizations that the Foundation is prohibited by law from funding with public funds (such as churches and private schools), and any organization that unlawfully discriminates in violation of state or federal law, including on the basis of race, ethnicity, nationality, gender, disability, sexual orientation, gender identity, age, or religion. In addition, individuals are not eligible to apply for grants in connection with the Community Grants Fund.

C. Grant Size

The Foundation has the discretion to determine the amount of each grant in connection with the Community Grants Fund. Grants to an organization will not exceed $25,000 in a grant cycle. Requested grant amounts must be substantiated by a program budget.

A single organization may apply for funding for more than one program, but must complete a separate application for each program for which it is seeking a grant.

For the 2024-2025 grant cycle, the Foundation Board has budgeted $300,000 for the Community Grants Fund, which, as mentioned above, includes $100,000 contributed by YouTube/Google.org. As a result, the Review Panel will be making recommendations to fund a total of $300,000 in Community Grants. The Foundation intends to award multiple grants that benefit a diverse cross-section of the San Bruno community, and the number of grants provided will depend on a number of factors, including the number and quality of applications received. The Foundation may elect to fund proposals at less than the requested amount.

D. Duration and Frequency of Grant Awards

Grant awards are to be used within a one-year period (the 2025 calendar year). Grantees are able to apply for funding for the same program for up to three consecutive years. After three years of consecutive funding for a particular program, the grantee is required to wait at least one year before reapplying for funding for that program. The grantee would be able to apply for funding in the fourth year for a different program.

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[1] All numerical references are to specific sections of the Internal Revenue Code.

E. Activities Eligible for Funding

The Foundation will fund two categories of activity:

- Programmatic Support
  - Project: temporary, produces specific results
  - Program: group of inter-related projects managed together on ongoing basis
  - Capital Project: purchase or construction of capital assets
- Capacity-Building Support
  - To assist an Applicant Organization in carrying out its mission more effectively

The Foundation will **not** directly fund the following: (1) existing deficits, (2) direct contributions to restricted endowments, (3) lobbying or political activity, and (4) religious activity that government agencies are legally prohibited from funding.

F. Funding Priorities

Applications must be for programs that (1) benefit the San Bruno community and (2) fall within one of the eleven focus areas outlined in the Foundation's Program Strategy Framework:

- Publicly owned community facilities
- Community health and safety
- Sports and recreation
- Education
- Youth activities
- Public spaces, parks, and open space

- Community building
- Human and social services for all
- Economic vitality
- Intra-San Bruno transit
- Healthy, stable, and affordable housing

G. Online Application Form

Applicant Organizations were required to submit all responses and supporting documentation electronically.

II. Review Process Overview

The application deadline was September 18, 2024. We received 55 grant applications by the deadline.

A. Due Diligence

Staff reviewed applications for completeness. As part of the due diligence process, staff also checked to ensure that the applications meet the Foundation's applicant and activity eligibility guidelines based on their responses to specific questions on the application. Three applications were found to be incomplete (*e.g.,* missing much of the required financial and supplemental documentation). We were

unable to confirm whether one Applicant Organizations met the eligibility requirements. Those four applications have been removed from the applicant pool and are not being passed on to the Review Panel for evaluation.

Finally, staff checked several federal and state registries to see whether Applicant Organizations are properly registered with the appropriate government agencies (IRS, California Secretary of State, California Franchise Tax Board, and California Attorney General's Registry of Charitable Trusts). Staff is following up with Applicant Organizations about questions raised by these checks, but we have not removed any applications from consideration on the basis of these checks at this time. One Applicant Organization, San Bruno Improvement Group, has applied for but not yet received 501(c)(3) public charity status from the IRS. We are giving this Applicant until November 12, the day before the Panel's deliberation meeting, to notify us that the IRS has approved its 501(c)(3) public charity tax-exempt status. If it has not obtained such approval by November 12, its application will be removed from consideration at the November 13 deliberation meeting.

B. Review Panel Reading and Rating

The second stage of review is where the Review Panel participates. Around October 7, staff will electronically distribute to the Panel the application reading list and rating instructions. We have scheduled three Zoom calls to review the instructions for reading and rating applications: **Tuesday, October 8, at 5:00-5:45 p.m., Wednesday, October 9, at 10:00-10:45 a.m., and Thursday, October 10, at 12:00- 12:45 p.m.** (Those that cannot make these times we will schedule individually.)

We also asked first-time members of the Review Panel to view a videotaped one-hour Diversity, Equity, and Inclusion (DEI) Training; returning Panel members may also want to view the training to refresh their memory.

The Review Panel will have almost three weeks to evaluate the applications. Panelists will rate each application, on a scale of 5 to 1, for each criterion as well as give an overall rating and provide any follow-up questions. **Ratings are due by Friday, November 1, 2024, at 5:00 p.m.**

Staff will compile the ratings, calculate an average overall rating for each application, and rank the applications in order. These ratings and rankings will serve as the starting point for the final step of the review process.

C. Review Panel Deliberations

The Review Panel will meet via Zoom from **4:00 p.m. to 7:00 p.m. on Wednesday, November 13, 2024**, to discuss the applications and agree on a slate of grant awards to recommend to the Foundation Board. The discussion will allow Panelists to explain their scores, discuss strengths and weaknesses of proposals, propose additional queries to ask of specific Applicant Organizations, and consider funding levels.

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There is a possibility that depending on the outcome of the November 13th deliberations and the Review Panel's recommendation for further inquiry of some applications, the Panel will need to have a final Zoom meeting in the latter half of November, after staff has pursued the additional follow-up, to finalize the slate of applications to be recommended to the Board for funding.

D. Board Consideration and Approval

The Foundation Board makes final decisions regarding grant awards. The Board will consider for approval the Review Panel's recommendations at its December 4, 2024, meeting.

III. Applicant Pool

The Foundation did extensive outreach to get the word out about this grant opportunity. We sent out program information to the Foundation's 800+ email distribution list and other networks of community organizations. We posted flyers and/or posters at Bayhill Shopping Center, Towne Center, and some downtown areas (including San Mateo Avenue and El Camino Real) merchants. We also had flyers and posters available at the San Bruno Library, Senior Center, City Hall, CityNet Services, and Community Services Department.

We conducted two grant workshops via Zoom in August and September, and both were well attended. At the workshops, staff explained the Community Grants Fund and eligibility requirements and walked attendees through the application. Each workshop concluded with a Q&A period. The questions asked at the workshops were converted into a Frequently Asked Questions document that was posted on the Foundation's website.

As mentioned above, this outreach resulted in 55 submitted applications, 51 of which are being passed along to the Review Panel for consideration. The total requested amount of these 51 applications is $865,664. Again, the Panel will make recommendations for a total of $300,000 in grants.

The Applicant Organizations range from established nonprofits with professional staff to small, grassroots, all-volunteer community organizations. Reflecting the diversity of the application pool, the quality of the applications varies quite a bit, which will affect the Review Panel's evaluation of the proposals. The majority of this year's applications came in right at the deadline, some of which appear to have been hastily written with inaccurate or missing information. You may take into account the quality and thoroughness of a particular application in your ratings.

IV. The Application Packets

Each Review Panelist is assigned 19 or 20 applications to read and rate. We are providing all application materials to you electronically so that you can easily read them on a tablet or computer.

You will each receive an email with the following information:

- The list of applications you are to read, which may note issues regarding specific applications
- Links that will take you to a PDF version of each application
- A spreadsheet for taking notes on the applications
- A spreadsheet containing the Community Grants Fund application and award history for each of this year's Applicant Organizations

A. Application PDFs

The application PDFs contain four sections. The first two sections are summaries of (1) the Applicant Organization and (2) the grant proposal. The second two sections required Applicant Organizations to respond to narrative questions related to (1) the organization's background and (2) the purpose of the grant. For the narrative questions, responses were limited to no more than 250 words each. (Note: Applications requesting Capacity-Building Support have to answer a different set of "purpose of grant" narrative questions, but there were no applications in this category this year.) The list of narrative questions is provided for your reference in Appendix A.

B. Link to Review Form

Each application will include two links at the top of the first page. The first link – "Review This Application" – will take you to the Review Form for that particular application. A sample copy of the Review Form is included in Appendix B. Section V below provides guidance for completing the Review Form.

C. Supporting Documents

The second link – "Supporting Documents" – will take you to a Google Drive folder containing the supporting documents for that particular application. Applications will include several categories of supporting documents that we asked Applicant Organizations to provide:

- **Marketing Collateral** highlighting the Applicant Organization's work such as an annual report, brochure, newsletter, blog posts, or direct mail (if available). Note: This was optional, and some Applicant Organizations did not provide an annual report or similar marketing piece.

- **Applicant Organization's Financial Statements** from the most recent fiscal year completed (audited if available).

- **Applicant Organization's Budget** for the fiscal year in which awarded grant funds would be used (expenses and income). If a budget or draft budget was not yet available, Applicant Organizations were allowed to provide the budget from the current fiscal year and describe any known variances expected in the coming year.

- **Completed Program Budget**. Applicant Organizations were instructed to download a Foundation-created Budget Template, complete it, and upload the completed Excel spreadsheet. The template provides a column to include the amount budgeted specifically for San Bruno next to the amount budgeted for the entire project.

- **Grant Report or Status Report** (required of Applicant Organizations who have received Community Grants in prior years). Grantees are required to submit a Grant Report no later than two months after the end of the grant period (the grant period for 2023-2024 Community Grants terminates on December 31, 2024). So that the Foundation is able to evaluate their prior use of grant funds, we required Applicant Organizations who currently have active grants to submit either the completed Grant Report or, if they were not yet ready to submit the Grant Report because they have not yet expended all of the funds, a Status Report providing an update on how much funding has been expended up until the application deadline of September 18, 2024. We have also included earlier Grant Reports for Applicant Organizations that received Community Grants in previous years so that you can see their entire history of utilizing SBCF Community Grants Fund support. Please note that a couple of prior-year grantees received extensions on their grants (extra time to expend the grant funds) and are still in progress, and so some grants awarded prior to the 2023-2024 may have a Status Report instead of a Grant Report.

- **Letter of Support (if applicable)**. The application asks if successful implementation of the program to be funded requires the cooperation of one or more partner organizations. If Applicant Organizations responded that they do have a required partner, or if staff determined that they have a required partner after reviewing their application, they were required to provide a letter of support from the cooperating entity to ensure that these entities are aware of the relevant requests and supportive of implementing these programs. Examples of where letters of support have been required include programs by outside organizations to be implemented at San Bruno public schools and mural projects requiring the permission of the building owner. If an Applicant Organization should have provided a letter of support from a required partner but failed to do so, we have noted that in your list of assigned applications to read. Also, please note that Letters of Support are not meant to be detailed or glowing letters of recommendation. All we seek to confirm with a Letter of Support is that the required partner does indeed want the program to take place (*e.g.,* the San Bruno Park School District wants a particular art program to be offered at all or some of the elementary schools).

The supporting documents are all clearly labeled with the Applicant Organization's name followed by "MARKETING," "FINANCIALS," "ORG BUDGET" (for organization's budget), "PROGRAM BUDGET" (for the budget of the specific program seeking funding) and "LETTER OF SUPPORT." Only previous grantees will have a "GRANT REPORT" or "STATUS REPORT." A Grant Report is included in those cases where all funds had been expended by the time the Applicant Organization submitted this year's application. If the organization has received several years of funding, all Grant Reports are included. Organizations that had not yet expended all of the grant funds by the application deadline submitted a Status Report.

V. Review and Ratings

You are to rate each application assigned to you on a scale of 5 (highest) to 1 (lowest) for each criterion as well as an overall score. All scores should be **whole numbers** (*e.g.,* no 2.5 or 3.7).

A. Criteria

We have established five primary criteria for evaluating applications. The following chart and explanations are to guide your ratings of each criterion:

> 5 = Exceptional – top 10% of applications, clearly meets the criteria
> 4 = Strong – top 25% of applications
> 3 = Good/OK – around the 50th percentile, generally meets the criteria
> 2 = Below Average – definitely in the bottom half of applications
> 1 = Minimal/None – bottom 10% or does not meet the criteria

The five criteria are as follows:

1. **The benefits of the proposed program to the San Bruno community:** It is critically important that all grant awards go to programs *that have meaningful benefit to the San Bruno community specifically*. We emphasized this over and over again (in our written materials and at the grant workshops) as the most important criterion. Applicant Organizations need to make the case that the proposed program addresses a need *in San Bruno* and that the grant funding would specifically benefit San Bruno.

   Key questions to consider include: Has the Applicant Organization made the case that there is a need for this program specifically in San Bruno? Are other organizations already meeting this need? What is the target population in San Bruno that would be served by the program? How does the program contribute to and/or impact the San Bruno community? Is the Applicant Organization able to quantify the community benefit (*e.g.*, how many people in San Bruno will benefit)? For those programs with a footprint greater than just San Bruno, does the Applicant Organization explain how the funds will specifically benefit the San Bruno community (*e.g.*, do we know that the funds will go specifically toward serving San Bruno residents vs. other program beneficiaries outside of San Bruno)? Narrative questions 5-6 should address this criterion.

   Proposals scoring high on this criterion will clearly articulate the need *in San Bruno specifically* and the ways in which San Bruno will benefit. Weaker proposals regarding this criterion may identify a need in San Mateo County generally but fail to discuss the need in San Bruno specifically (*e.g.,* identify need for veterans' mental health services in San Mateo County generally but not in San Bruno specifically). Weaker proposals may also fail to tailor the use of the funds to the San Bruno community's benefit (*e.g.*, asking for funding to

support a program's services that are offered throughout San Mateo County, but only a small portion of the funds would be used to benefit San Bruno directly or it's not clear that a significant portion of the funds would be used to benefit San Bruno).

Please note: There is no requirement that Applicant Organizations must be physically located in San Bruno or that the delivery of services to the San Bruno community physically take place within San Bruno's borders. For example, a nonprofit based in Burlingame could seek funding for a program that it runs out of its Burlingame facility, so long as it makes a sufficient case that the program serves San Bruno residents, it meets a need in San Bruno, and the funds being sought are tied to the benefit of the San Bruno community.

2. **The proposal's alignment with one or more of the Foundation's focus areas:** The Foundation Board took the results of the Foundation's extensive 2015 Community Listening Campaign to identify 11 focus areas for the Foundation's work and reconfirmed those focus areas after the most recent 2021 Community Listening Campaign 2.0. It is imperative that grant awards go to support programs that fall within one or more of these focus areas. Narrative question #8 gave Applicant Organizations the opportunity to make the case, in the event that it is not self-evident, that their proposal clearly falls within one or more of the focus areas.

3. **Program methodology and budget:** In your assessment, would the proposed program satisfactorily meet the needs that it aims to address? Has the Applicant Organization articulated a well thought-out plan of action that can be effectively accomplished given its staffing, resources, expertise, and bandwidth? Does the program budget reflect a realistic estimate of the necessary expenses to carry out the proposal?

In addition, is the program supported by several sources of funding? We believe that it is important for an organization to have "skin in the game," so to speak, and we do not want an organization to become completely dependent on the Foundation for the program to continue beyond 2025. It may be reasonable for the Foundation to provide most (or possibly even all) of the funds for a proposal in the first year if the Applicant Organization has clearly articulated a plan to develop other long-term funding sources.

4. **Requested grant amount in relation to the anticipated community benefit:** Applicant Organizations are able to request grant funding up to $25,000. Many Applicant Organizations asked for the full amount – some, perhaps, because they could. Is the requested grant amount proportional to the anticipated community benefit? For example, a proposal that benefits 10 students (that is, a relatively small number of people) might be deemed worthy of a $5,000 grant, but the community benefit may not justify a substantially larger grant. Also, please consider quantitative (how many people will directly be affected by the proposal?) as well as qualitative (including secondary community benefits) measures of community benefit.

5. **Organizational track record, stability, and financial health:** Some proposals have been submitted by large, established organizations with large paid staffs, and others come from small, grassroots, volunteer-based community organizations. While the Foundation is very interested in supporting different types of organizations, it also has a fiduciary responsibility to ensure that all grantees are sufficiently equipped to properly administer grant awards. Does the Applicant Organization appear to have the staffing (whether volunteer or paid) to carry out its proposed program? Does the Applicant Organization appear to have the administrative and financial structures in place to ensure that grant funds would be used for their intended purposes? How long has the Applicant Organization been in existence? How long has it been running the program for which it seeks funding? Does the Applicant Organization appear to be financially healthy? Has it recently experienced significant changes in leadership and staffing? How has the COVID-19 pandemic affected the Applicant Organization's programs and financial health? Did staff note that the Application Organization is not in good standing with one of the government regulatory bodies with which they are to be registered? Do you have any concerns about the Applicant Organization's stability, ability to carry out the intended program, and prospects for long-term success?

B. **Overall Score**

The overall score should be your overall rating for a particular application. *The most important criterion is benefit to the San Bruno community*, which should be weighted about 40% of the overall score. The four remaining criteria (alignment with a focus area, program methodology and budget, requested amount in relation to community benefit, and organization's track record, stability, and financial health) should generally be weighed equally for the remaining 60% (about 15% each).

At the same time, the overall score should **NOT** necessarily be a mathematical calculation of the five criteria scores. **You may decide that an exceptional strength in one area merits a bump up in the overall score, or a serious deficiency in one area outweighs strengths in other areas.**

PLEASE NOTE: The one area where applications cannot score on the low side and still receive an overall score of 4 or 5 is "benefits to the San Bruno community." ***Given the origins of the Foundation's funds, all grant recipients must demonstrate meaningful community benefit in San Bruno specifically.***

Please use the following guidelines when assigning an application's Overall Score:

5 = Exceptional – we'd be crazy not to give this organization a grant!
4 = Strong – very competitive; should seriously be considered for a grant
3 = Good/OK – meets the basic requirements and has no serious weaknesses
2 = Below Average – has serious weaknesses in at least one criterion
1 = Not Qualified – should not be in consideration for a grant

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We realize that some of you will likely be "harder" graders than others, and that's fine. That's why we have multiple readers review each application. At the same time, we don't want applications disadvantaged by a particularly harsh grader or advantaged by an overly generous one, so we do ask you to be mindful of distributing your scores to distinguish between stronger and weaker applications. In other words, it's not as helpful if you give half of the applications you read a 5, or if you give none or maybe one a 5. Try your best to distribute your scores using the full range of options.

In addition, keep in mind that in each of the past seven years, we have awarded $300,000 – funding 23 different programs in 2017-2018, 25 in 2018-2019, 29 in 2019-2020, 23 in 2020-2021, 23 in 2021-2022, 23 in 2022-2023 and 26 in 2023-2024. Although it will depend on the Review Panel's assessment of this year's applicant pool, let's assume that we fund 22-26 programs this year. Each panelist will read 37%-39% of the application pool (19-20 out of 51). If you also read 37%-39% of the eventual grant winners, on average seven or eight of the applications you read will be funded.

The Review Form will allow you to write down any follow-up questions you have about the particular Applicant Organization. As noted above, the quality of the proposals varies greatly, and after reading some proposals, you may have additional questions you would like answered before being able to support funding. For example, you may feel that an Applicant Organization has sufficiently identified a community need, but you aren't sure that the proposed program is justified by the program budget. Or you may have concerns about funding all parts of a proposal and be more comfortable advocating for partial funding. (Remember that the program guidelines explicitly state that the Foundation has the discretion to fund proposals at less than the requested amount, and, in fact, in past years we have funded a large number of proposals at less than the requested amount.) Please include these types of follow-up questions and concerns in the "Follow-up Questions" box.

C. Consideration of Past Community Grants Fund Grantees

Through the Community Grants Fund, the Foundation has funded 186 programs over the past eight years. More than half of this year's Applicant Organizations are previous grantees. Some have reached their third year of funding for one specific program (the limit for consecutive years of funding under the program guidelines) and are now applying for a different program. Some have already been funded three years in a row, taken a year off, and are back seeking funding for the original program. In the final narrative question, past grantees are asked to describe how this year's proposal differs from the previously funded proposal. Also, as mentioned earlier, these Applicant Organizations were required to provide, in addition to the rest of their applications, the formal Grant Report that they are required to submit after the grant funds have been expended or, if the grant is still in progress, a Status Report.

The Grant and Status Reports provide confirmation that the funding was used for the grant purpose specified, details on the accomplishments/challenges of carrying out the funding goals, and publicity materials acknowledging the Foundation. All Grant Reports for program years 2018-2019 through 2022-2023 include a statement of revenues and expenditures associated with the grant purposes; in 2016-2017 and 2017-2018, grantees awarded grants under $10,000 were not required to provide a statement of revenues and expenditures with their Grant Reports. For grantees providing a Status Report on a

grant, you should not "ding" them for not having spent the entire grant amount yet. Grantees are given the entire calendar year to expend their funds, so they have until December 31, 2024, to do so (and those from previous years have been given extensions for legitimate reasons).

Previous grantees have no guarantee of receiving another year of funding, and you should give no preference toward funding a repeat grantee just because it was funded last year. At the same time, you should not give a lower score because the Applicant Organization received SBCF funding last year. You are to evaluate each application in the context of *this year's* grant application pool. The Grant Reports of all programs funded or Status Reports for current programs will provide you with information about the Applicant Organization's effectiveness in administering previous grants, which you can use in your evaluation of the current grant application.

As mentioned earlier, we are providing a spreadsheet that indicates if and when Applicant Organizations have applied for and received a Community Grant in a prior year, so that you can see their past history with the program. This includes instances where Applicant Organizations applied for – but did not receive – Community Grants Fund funding in any past year.

D. Partial Funding

The Foundation would like to provide grants to a diverse array of meritorious applications. This means we will likely be looking to fund some proposals at less than the requested amount, so your thoughts on which applications would be good candidates for partial funding are important. In past years, the Review Panel has typically recommended that many proposals receive funding below the requested amount.

VI. Review Form

You will submit all ratings of the applications through an online Review Form (example is in Appendix B). As mentioned above, at the top of each application PDF there is a link called "Review This Application." When you click on this link, you will be taken to the online form for the particular application. The Applicant Organization's name and the program name are automatically populated at the top of the form. You will need to fill out the "Reviewer" section with your first and last name as well as your email address.

You must provide a rating score for each of the five criteria as well as an overall score for each application you have been assigned to rate. There will also be a "Notes" field next to each score where you can jot down any thoughts you think are important in explaining your rating and will help refresh your memory during the Panel's deliberations. And, as mentioned above, we encourage you to use the "Follow-Up Questions" box on the form to write down additional questions, concerns, or ideas about partial funding.

Moreover, because you may want to review some or all of your assigned applications before inputting them into the online form, we are providing a spreadsheet that you can use for your own offline notes.

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You will **NOT** submit this spreadsheet (all ratings must be submitted in the online Review Forms), but you might find this helpful for jotting your notes with pen and paper as you go along. Included is a box to check off when you have submitted the Review Form to avoid duplicated submissions. Use of the spreadsheet is optional. **All rating scores must be submitted online.** Once you submit the online Review Form, you will receive a confirmation email with your scores for that application.

VII. Your Top Five List

We ask you to identify the top five applications that you believe SBCF should fund. After you have read your entire set of assigned applications, take a minute to reflect on the whole set and pick the five you feel most strongly about funding. There is also a column on the spreadsheet to mark your top five. At the conclusion of submitting all of your ratings, **we ask you to send Jessica (grants@sbcf.org) an email titled "Top 5" and list by name your top five list** (organization name is fine, but for those organizations (Lowen Soccer Club and San Bruno Lions Foundation) that submitted more than one application, indicate the program name as well).

VIII. Review Deadline

Please complete all assigned online ratings in each application Review Form and email Jessica your Top 5 List (grants@sbcf.org) no later than 5:00 p.m. on Friday, November 1, 2024.

Any questions? Do not hesitate to call or email us. Thank you again for your service on the Review Panel!

APPENDIX A

2024-25 COMMUNITY GRANTS FUND APPLICATION
NARRATIVE QUESTIONS

NARRATIVE: ORGANIZATIONAL INFORMATION
All Applicant Organizations to Complete

Please provide short answers (no more than 250 words each) to the following questions:

1. Briefly describe the Applicant Organization's history, mission, and goals.

2. Briefly describe the Applicant Organization's current activities, recent accomplishments, and future plans.

3. Is there anything else you would like to share about the Applicant Organization that reflects on its track record, stability, and/or financial health? If applicable, please use this space to explain any issues related to the Applicant Organization's current status with any oversight entity, including but not limited to the IRS (Tax Exempt Organization Search), California Secretary of State (Business Search), California Franchise Tax Board (Entity Status Check), and California Attorney General (Registry of Charitable Trusts Verification Search)**.** You may also include an explanation of how the COVID-19 pandemic has impacted the Applicant Organization operationally, financially, and programmatically.

NARRATIVE: PURPOSE OF GRANT
For Programmatic Support Requests

Please provide short answers (no more than 250 words each) to the following questions:

1. Describe the proposed program. Present a detailed description of the specific activities for which funding is being requested, including program goals and objectives.

2. Identify the needs, problems, and/or opportunities to be addressed, as well as the other organizations addressing this issue in San Bruno.

3. Explain how the program contributes to and/or impacts the San Bruno community, using both quantitative and qualitative measures when possible. Identify the target population to be served, the estimated number of San Bruno community members to be reached, and how they will benefit. If the program serves a geographic area larger than San Bruno, explain how the requested funds would be used to benefit the San Bruno community specifically.

4. How will you measure the program's success?

5. Explain how the program aligns with the SBCF Focus Areas selected on Page 3.

6. Describe in detail how the Applicant Organization will implement the program, including tasks or stages involved, which staff members or volunteers will be involved in carrying out each task or stage, how you will reach your target population, and the general timeline for implementation of the program.

7. If the program is a collaboration, identify the other organizations and/or partners participating in the program and their roles.

8. If funding in addition to any SBCF grant awarded is necessary to implement the program, indicate where you will obtain the additional funding and whether the program can be implemented without such additional funding. List other funders and/or potential funders and amounts committed or requested for the program.

9. Describe how you will be able to implement this program without SBCF funding, if at all.

10. If the program will continue beyond the 2025 calendar year, describe its long-term funding sources. How will the program be sustained?

11. ***For past Community Grants Fund grantees only:*** If this program received a Community Grant from the San Bruno Community Foundation in any previous year, briefly describe how this year's proposal differs from the previously funded proposal.

CGF 2024 Review Form

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Review and Ratings

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2024 Community Grants Review Panel,

Thank you for taking the time to review and evaluate these applications. We kindly ask that you submit your scores for each application on your reading list by completing a Review Form. Please ensure that all forms are submitted no later than **5:00 p.m. on Friday, November 1, 2024**.

After submitting all of your online ratings, please send an email to **grants@sbcf.org** with the subject line "Top 5." In the email, list the names of your top five applications that you believe SBCF should fund. Be sure to include the organization name, and for organizations that submitted multiple applications, specify the program for each.

Should you have any questions, please email grants@sbcf.org.

Click here for the Review and Ratings Instructions.

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CGF 2024 Review Form

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Applicant's Information

Applicant Organization Name:

Program Name:

Reviewer

First Name *

Last Name *

Email *

Please provide a rating score for each of the five criteria as well as an overall score for the application. Please use a rating scale of 5 (highest) to 1 (lowest).

Review/Score

	Criteria	Score	Notes
1.	Benefits of the proposed program to the San Bruno community	Please select... ⌄ *	
2.	Proposal's alignment with one or more of the Foundation's focus areas	Please select... ⌄ *	
3.	Program methodology and budget	Please select... ⌄ *	

	Criteria	Score	Notes
4.	Requested grant amount in relation to the anticipated community benefit	Please select... ❯ *	
5.	Organizational track record, stability, and financial health	Please select... ❯ *	
6.	Overall Score	Please select... ❯ *	

Follow-Up Questions

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