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HOW TO SUBMIT A SUCCESSFUL GRANT APPLICATION

SHAPING A STRONG GRANT APPLICATION

1. Do your research. If the grantmaker has a website, review it and download the applicable materials. Review the grantmaking procedures and guidelines before contacting the grantmaker with questions.
2. Make sure you understand the expectations and procedures of the grantmaker. If in doubt, ask for clarification.
3. Follow the directions outlined in the application/guidelines. Use a grant application checklist if provided and include only the materials specified. Proofread carefully - make sure numbers add up and typos are removed.
4. Grantmakers frequently need to read many letters and applications in a short period of time; an application that is easy to read and with clear content is more likely to be given serious consideration.
5. Don't ask, "What would you fund?" or "What amount should I ask for?" Grantmakers can give guidance, but most do not want to give the impression that they can "guarantee" a grant for a certain project or for a certain amount. Ask yourself the question "What is our organization's greatest current need, and how does it fit into this grantmakers guidelines?"
6. Keep a copy of your grant application and all correspondence for your files.

EFFECTIVELY MANAGING A GRANT AWARD

After a grant is received, the grantee will carry out the activities it proposed in its grant application. The grantee will need to show the funder that it is meeting its stated objectives and following grant requirements. The following helpful hints may help in managing grant awards:

1. Read all the materials sent with the grant, including the grant award letter and other documents
2. Notify the appropriate staff/volunteers about the grant award.
3. Maintain a file for the grant award to include a copy of the grant application, the grant agreement, correspondence, and reporting deadlines.
4. Review the grant agreement with the person who will be responsible for managing the grant award. Make note of any special tasks and deadlines. The responsible individual will need to:
 - a) Create a grant award calendar and note all reporting dates.



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- b) Review the final report requirements, make note of any information that should be collected, and develop a plan to collect this information.
- c) Maintain a record of income and expenses related to the project, using generally accepted accounting practices.
- d) Send the final grant outcome report on time. If a specific form or format is required, use it. If you are unable to send the grant outcome report on time, request an extension from the grantmaker, explaining why the report will be late.
- e) Contact the grantmaker if there are any questions about the grant award, a change in the purpose of the funded project, or a need for an extension of the grant.

DEVELOPING A BUDGET

The budget tips and sample provided below are meant to serve as a guide, not a mandatory budget format. Your budget does not have to duplicate this format exactly.

- Clearly depict how much money is needed and how it will be used.
- The budget should include sources (income) and uses (expenses) of funds.
- Sources of funds should include names of other funding organizations and amounts pledged or received as well as amounts still needed to be raised and possible sources for those funds.
- Indicate the time period covered by the budget.
- Finally, make sure all the numbers add up.

SAMPLE BUDGET CATEGORIES

Below is a list of suggested budget categories to use when developing your proposal budget. The clearer you are about where funds are coming from and how they will be used, the easier it will be for the reviewer to assess your financial need.

Sources of Funds

- ✓ Federal/state/local grants or contracts
- ✓ Bequests
- ✓ Corporate and foundation grants
- ✓ United Way and Federated Campaigns
- ✓ Other fundraising, such as individual gifts and special events
- ✓ Other types of income (fees, membership dues, sales of publications or merchandise, etc.)

Uses of Funds (Expenses)

- ✓ Salaries, benefits and payroll taxes
- ✓ Professional or consulting fees
- ✓ Insurance
- ✓ Travel and transportation
- ✓ Supplies, copying, postage
- ✓ Rent and utilities
- ✓ Staff training and development



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GRANT APPLICATION CHEAT SHEET

The below information is needed or required to complete your new application.
We strongly recommend compiling all information before starting the application in our system.

BEFORE YOU BEGIN

- Visit our website to review the Foundation's Grant Guidelines:
<http://www.montereypeninsulafoundation.org/grantmaking/how-to-apply/guidelines/>
- Available on our website are budget templates, a guide to navigating the Online Portal, an FAQ for the Cycle shifts and how to select a home cycle for your applications, as well as helpful hints for grant seekers.
- Make sure to save your work every 15-20 minutes, as this grant application may time out if it takes longer than 20 minutes to complete.
- To access all saved or submitted applications and reports, please log-in to the Online Portal.
- Add noreply@salesforce.com to your safe senders list to ensure receipt of our emails. Check your spam/junk folders periodically to make sure you have important correspondence.

TIMEFRAME FOR APPLYING

We ask that grant applications be submitted by the following dates:

- **Summer Cycle:**
 - April 1 for July Review
- **Fall Cycle:**
 - In 2019-20: July 1 for October Review
 - In 2020-21 and future years: August 1 for November Review
- **Winter Cycle:**
 - December 1 for March Review

Before submitting your application, spend some time thinking about the right timeline for your organization to apply. Reach out to MPF staff if needed to discuss the right timeline for your organization.

Only completed grant applications from eligible organizations will be considered for funding. Applicants should make every effort to ensure their application includes all financial, budget, and other attachments required in our online application process. If an application is received incomplete, it may delay the review to a later date.



HELPFUL APPLICATION TIPS

- The Character limits are throughout the application in the parenthesis – i.e. (2000) or (3000).
- If you are over the character limit, the application will not save when you select pause or let you go to the next page. The Pause button to save your application will not save unless the current page you are on **is filled out completely.**
- The character count includes all punctuations and spaces. Although Microsoft Word may say that you are under the character count, our system includes all paragraph separations and spaces.

APPLICATION QUESTIONS

Page 1- Organization Information

- Organization Name
- Legal Name
- Tax Id
- Address
- City
- State
- Zip Code
- Phone Number
- Website
- Mission Statement *(3,000)
- Year Established
- Organization History *(3,000)
- Organization's Programs *(4,000)
- ORGANIZATION BUDGET UPLOAD
- Constituents Served by Organization *(3,000)
- Ten Largest Financial Gifts *(3,000)
- Fiscal Year End Date -- format: 12/31; 6/30; no year dates please



Page 2- Executive Director

- Executive Director Title
- Executive Director Office Phone
- Executive Director Extension
- Executive Director Email

Page 3- Contact

- Contact for Grant Request

Page 4- Staff

- Number of Full Time staff
- Number of Part Time Staff
- Number of Volunteers

Page 5- Board of Directors

- Current List Board of Directors (names, profession, city of residence) *(3,000)
- Money Board of Directors Contribute
- Percentage Board of Directors Contribute Request Information

Page 6- Request Information

- Requested Amount
- Program Title
- Program/Grant Start Date (must be within the same month or after grant committee meeting)
- Program End Date
- Community Need *(3,000)
- Program Summary *(3,000)
- Constituency This Program Serves *(3,000)
- Three Main Goals of Program *(3,000)
- How Organization Collects Information *(3,000)



Page 6- Request Information (cont.)

- # served Constituents
- All Grant Requests for This Program
- PROGRAM BUDGET UPLOAD (if applicable)

Page 7- Key Staff

- Program Area
- Type of Support

Page 8- Financial Documents (all uploads)

- Most Recently submitted 990. **New requirement**
- Statement of Financial Position for the most recently completed fiscal year.
- Statement of Activities for the most recently completed fiscal year.
- Audited Financial Statement

***Note:** Organizations requesting more than \$75,000 are required to submit a full financial audit. Organizations requesting more than \$25,000 are required to submit a financial review completed by a third party for the most recently completed fiscal year.

Page 9- Signatures

We, the undersigned, hereby state that the information provided in this application is complete and factual. By typing our names below and submitting this application, we confirm our authority and have notified and secured approval from all necessary parties. We hereby agree that funds, if granted, will be used only for the purpose described above unless written approval from Monterey Peninsula Foundation is received.

We, the undersigned, agree to accept grant distributions via ACH payment and agree to comply with all grant requirements of Monterey Peninsula Foundation for any grant distributions received:

- If awarded, all grant funds will be used only for the purposes described in this grant application, and is not for the personal benefit of any individual;



Page 9- Signatures (cont.)

· Substantive changes involving the reallocation of grant funds must be approved in advance by the Foundation, and any funds not used for Foundation-approved purposes will be returned to the Foundation;

· If awarded, this grant will not be used to satisfy the payment of a pre-existing pledge or other financial obligations;

· If awarded, any portion of this grant will not be used to influence the outcome of any specific election for candidates to public office, to influence legislation, or to induce or encourage violations of law or public policy, to cause any private inurement or improper private benefit to occur, or to take any other action inconsistent with Section 501 (c) (3) of the Internal Revenue Code.

· Failure to comply with the above grant requirements shall entitle the Foundation to a refund of all or a portion of the grant distribution.

· We, the undersigned, certify that the practices of this organization conform to the non-discrimination policy as follows. This organization does not discriminate in its employment practices, volunteer opportunities or delivery of programs and services on the basis of race, religion, gender, national origin, age, disability, veteran status, marital status, sexual orientation, or any other characteristics protected by law.

Signature of Authorized Board Member

Signature of Additional Authorized Representative

Date



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GRANT REPORTING INFORMATION (FINAL REPORTS/MID-YEAR REPORTS)

The below information is needed or required to complete your final report and mid-year report. We strongly recommend compiling all information before starting the application in our system.

BEFORE YOU BEGIN

- Visit <https://portal.mpfca.org/grant> to access your report.
 - If you have not registered with MPF's new grant portal, please email hk@mpfca.org to request log-in information.
- Available on our website are budget templates, a guide to navigating the Online Portal, an FAQ for the Cycle shifts and how to select a home cycle for your applications, as well as best practices.
- Make sure to save your work on a separate document, as the report module may time out if it takes longer than 20 minutes to complete. **The system will not save your information.**
- To access all saved or submitted applications and reports, please log-in to the Online Portal.
- Add noreply@salesforce.com to your safe senders list to ensure receipt of our emails. Check your spam/junk folders periodically to make sure you have important correspondence.

REPORTING DEADLINES

In accordance to the application you received your grant award, all final reports/mid-year reports must be submitted by the following dates:

- **Summer Cycle:**
 - Reports due March 1
- **Fall Cycle:**
 - Reports due July 1
- **Winter Cycle:**
 - Reports due November 1

These deadlines apply to **all** final reports/mid-year reports in accordance to the cycle you received your award. Monterey Peninsula Foundation requires all grantees to complete reports for active grants. If you do not know which cycle applies to you, please contact hk@mpfca.org.

Grantees should make every effort to ensure their reports includes all financial attachments required in the reporting process. If an application is received incomplete, it may delay the review future application review or payment of multi-year award.



HELPFUL REPORTING TIPS

- Multi-year awards are required to submit a mid-year report AND a final report. Agencies must successfully complete the mid-year reports in order to receive the next allocation of funding.
- Reporting requirements for matching awards will be noted on the award email.
- The character limits are throughout the report in the parenthesis – i.e. (2000) or (3000).
- If you are over the character limit, the report will let you go to the next page.
- Your application will not allow you to move to the next section unless **is filled out completely.**
- The character count includes all punctuations and spaces. Although Microsoft Word may say that you are under the character count, our system includes all paragraph separations and spaces.
- If you have not fully expended all MPF Funds by the report deadline, you must provide a written request for an extension via email. Extensions are approved on a case-by-case basis. Please send all extension requests to Hana Kong, Program Officer, at hk@mpfca.org.
- You cannot apply for a new grant without completing the report on a previous award.
- Before submitting your next application, spend some time thinking about the right timeline for your organization to apply. Reach out to MPF staff if needed to discuss the right timeline for your organization.



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FINAL REPORT REQUIREMENTS

Narrative Section – 3 questions

1. Actual Outcomes of Program (character limit including spaces: 2,000)
2. Challenges to Program (character limit including spaces: 2,000)
3. Number of Constituents Served

Financial Documents

1. Budget to Actual Comparison
 - a. Must show budgeted and actual income and expenses
-

MID-YEAR REPORT REQUIREMENTS

(MULTI-YEAR AWARDS ONLY)

Narrative Section – 3 questions

1. Actual Outcomes of Program (character limit including spaces: 2,000)
2. Challenges to Program (character limit including spaces: 2,000)
3. Number of Constituents Served

Financial Documents

1. Year budget to actuals comparison (Must show budgeted and actual income and expenses)
2. Year 2 budget for the next payment period
3. Most recent audit or financial review if single year award amount meets the following criteria:
 - a. Most recent audit for annual award over \$75,000; **OR**
 - b. Most recent financial review for annual award over \$25,000 but less than \$75,000



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SAMPLE PROGRAM BUDGET

Organization Name (required): ABC Nonprofit
Program Name (required): XYZ program
Program Date (required): 7/1/15 – 6/30/16
Request to: Monterey Peninsula Foundation

INCOME (required):	Monterey Peninsula Foundation	Other Proposals	Committed Funds	Program Revenue	TOTAL	Actuals <i>(Leave this column blank until grant report)</i>
Monterey Peninsula Foundation	\$25,000				\$25,000	
Foundation A		\$57,500	\$25,000		\$82,500	
Foundation B			\$2,500		\$2,500	
State Grant		\$2,500			\$2,500	
Annual Silent Auction				\$10,000	\$10,000	
Donations from individuals				\$5,000	\$5,000	
	\$25,000	\$60,000	\$27,500	\$15,000	\$127,500	

EXPENSES (required):	Monterey Peninsula Foundation	Other Proposals	Committed Funds	Program Revenue	TOTAL	Actuals <i>(Leave this column blank until grant report)</i>
Program Manager	\$25,000	\$14,000	\$25,000		\$64,000	
Part-Time Staff		\$10,000	\$2,500		\$12,500	
Taxes and Benefits		\$1,000			\$1,000	
Evaluation		\$5,000			\$5,000	
Supplies		\$5,000			\$5,000	
Travel				\$10,000	\$10,000	
Publications and Postage		\$5,000			\$5,000	
Rent and Utilities				\$5,000	\$5,000	
Staff Training		\$20,000			\$20,000	
	\$25,000	\$60,000	\$27,500	\$15,000	\$127,500	