



MONTEREY
PENINSULA
FOUNDATION

Grant Application Guidelines

1 Lower Ragsdale Drive
Building 3, Suite 100
Monterey, CA 93940
t 831 649 1533
f 831 649 1763

www.montereypeninsulafoundation.org

The Monterey Peninsula Foundation enhances the quality of life in Monterey County and surrounding areas through strategic disbursement of charitable funds generated by hosting the AT&T Pebble Beach National Pro-Am and the Walmart First Tee Open at Pebble Beach.

Foundation Update for FY 2008-09 and FY 2009-2010

January, 2009

The economic downturn is affecting everyone, including funders. The Monterey Peninsula Foundation is committed to supporting our community organizations, and with less resources, the Foundation has revised its grantmaking strategies for FY 2008-09 and FY 2009-2010 as follows:

- The Foundation is unlikely to fund requests from new applicants (nonprofits that have not previously received a grant from the Foundation)*
- The Foundation is unlikely to fund requests for new programs except for safety net agencies*
- The Foundation is unlikely to fund requests for increased funding from previous grantees*
- The Foundation is unlikely to fund multi-year grants*
- The Foundation is unlikely to fund capital campaigns*
- The Foundation is unlikely to fund schools or organizations that fundraise for schools (except for the Youth Fund)*

Questions should be addressed to the Director of Grant Programs, Laurel Lee-Alexander.

Grant Programs Contact Information

Web Site

The Monterey Peninsula Foundation's website (www.montereypeninsulafoundation.org) offers information about the Foundation, our grant programs and how to submit a grant application. Please check the "Grant Making" section of the website for more information and to download documents such as the *Monterey County Area Grantmakers Common Grant Application* and the *Monterey Peninsula Foundation Youth Fund Grant Guidelines and Application Form*.

Grant Programs Staff

Inquiries about possible grants and proposals should be directed to the Foundation's Director of Grant Programs, Laurel Lee-Alexander.

t 831-649-1533, x230
f 831 649 1763
e lla@attpbgolf.com



Table of Contents

**Foundation Update for FY 2008-09 and FY 2009-2010
Grant Programs Contact Information**

[Page 2](#)

Message from the Chairman and President/CEO

[Page 3](#)

Grant Guidelines

[Page 4](#)

Steps for Submitting a Grant Application

[Page 6](#)

Frequently Asked Questions

[Page 7](#)

Frequently Asked Questions - The Youth Fund

[Page 9](#)

Message from the Chairman and President/CEO

Dear Friends,

These Grant Application Guidelines are designed to be used by applicants interested in requesting grant funds from the Monterey Peninsula Foundation. Information provided includes the focus areas of the Foundation, information about our grant process, and how to submit a grant application.

The Monterey Peninsula Foundation is a private foundation that hosts the AT&T Pebble Beach National Pro-Am golf tournament in Pebble Beach, California and distributes the tournament's proceeds to the community through our grant programs. Since 1947, the Monterey Peninsula Foundation has focused on making a significant contribution to the community. Central to our focus is to protect and grow:

- Our "tradition" of over 60 years of history-making golf and forward looking philanthropy
- Our "stewardship" of a noble purpose passed down through decades of dedication to a charitable ideal
- Our "integrity" of service to the community through generous and well-managed philanthropy

Since the first winning putt was made on Pebble Beach back in 1947, a total of over \$73 million has been raised to support area charities. The Monterey Peninsula Foundation welcomes your interest in our grant programs.

A handwritten signature in black ink, appearing to read "Clint Eastwood".

Clint Eastwood
Chairman

A handwritten signature in black ink, appearing to read "Ollie J. Nutt".

Ollie J. Nutt
President/CEO

Grant Guidelines

BACKGROUND

The Monterey Peninsula Foundation awards grants to nonprofit organizations that benefit the community in the focus areas of Arts & Culture, Community & Environment, Education, Health & Human Services, and Youth. The Foundation's geographic funding areas include Monterey, Santa Cruz, and San Benito Counties in Central California, with limited grants to organizations in Northern California. The Foundation's principal source of funds is the AT&T Pebble Beach National Pro-Am. The Monterey Peninsula Foundation also administers the Youth Fund, a youth-oriented fund that awards grants to youth-oriented nonprofit organizations and schools in Monterey, Santa Cruz Counties and San Benito Counties. There are separate grant guidelines for the Youth Fund.

GRANTMAKING OBJECTIVES

The Foundation encourages applications that provide significant benefits to the community in the areas of interest: Arts & Culture, Community & Environment, Education, Health & Human Services, and Youth. The Foundation places a higher priority on applications that offer creative responses to the community's most pressing unmet needs and show promise of building ongoing local support for needed services.

Organizations seeking funding should have:

- A broad base of funding support
- Management capacity to effectively execute the project
- A clear, concise plan for project evaluation with outcome measurement
- Collaboration among other service providers

Organizations seeking funding should have a specific program which:

- Addresses a significant funding gap or critical opportunity (such as access for people from low-income areas or for disadvantaged members of the community)
- Has long-term impact in terms of replication or reach
- Emphasizes preventive intervention and education
- Produces measurable results

SCOPE AND TYPE OF GRANTS

Areas of Focus

The Foundation's focus areas are: Arts & Culture, Community & Environment, Education, Health & Human Services, and Youth. The Foundation's Youth Fund is a separate grant fund that awards grants to selected youth-oriented organizations in Monterey, Santa Cruz and San Benito counties. Nonprofit organizations can submit one grant application per twelve-month period to either the Monterey Peninsula Foundation or the Youth Fund, with the exception of colleges and universities, which may apply separately to the Monterey Peninsula Foundation and the Youth Fund.

Types of Grants

The Foundation will consider grant applications for capital projects, programs, and operating support. Grants range from \$10,000 – \$100,000, and higher for major or capital projects. The Foundation occasionally makes multi-year grants. Grant applications should show strong and realistic financial planning. The Foundation may make matching or challenge grants to help organizations attract wider support. **NOTE: Please see page 2, "Foundation Update for FY 2008-09 and FY 2009-2010."**

Geographic Funding Areas

Monterey, Santa Cruz and San Benito Counties in Central California, with limited grants to organizations in Northern California.

The Foundation does not fund:

- Organizations without 501(c)(3) status, except schools or public agencies
- Organizations classified as private foundations
- Organizations that have been in operation less than 3 years
- Organizations that discriminate on the basis of race, culture, gender, sexual orientation, religion or age
- Individuals
- Political parties, candidates, or partisan political organizations or activities
- Organizations whose activities are located outside of the United States
- Emergency operating funds or requests to reduce debt or past operating deficits
- Annual meetings, annual fund appeals, advertising, contests, fundraising events, ceremonies, conferences, travel, memorials or testimonials
- Endowments, academic or science research
- Development or production of books, films or video projects
- Salaries for teachers or school employees
- Organizations with a limited constituency, such as labor organizations, fraternal organizations
- Nonprofit organizations that spend more than 25% of their revenue on management overhead and fundraising costs

GRANT REVIEW PROCESS/TIMING

After a complete (all submitted materials are current and complete according to the directions) grant application is received, the Foundation Grant Programs staff and Grant Committee review it. As a result of the initial review, a request for additional information from your organization may be required. Site visits may occur after a grant application is determined to be complete. A site visit by the Foundation staff or Grant Committee does not guarantee funding approval. If a grant application does not meet the criteria of the Foundation, the applicant will be notified immediately. Applicants should expect 90 -180 days for grant application review and determination of any funding.

The Foundation will consider one grant application per organization, in a twelve-month period to either the Foundation or Youth Fund. The exception is for colleges and universities in the Foundation's geographic funding areas, which may apply both to the Monterey Peninsula Foundation and the Youth Fund. There are currently no deadlines; the Foundation accepts grant applications throughout the year. While applicants are encouraged to submit applications any time, grant funding decisions are not made from January - March due to coordination of the AT&T Pebble Beach National Pro-Am golf tournament.

RESPONSIBILITY OF GRANT RECIPIENTS

If the grant application is approved for funding, a Grant Agreement outlining the terms and conditions of the grant will be sent, which must be signed by an authorized management official of the grantee and returned to the Foundation. A grantee must use the funds awarded for the specific purpose as outlined in the Grant Agreement. Any requests for a revision in use of funds must be submitted in writing to the Foundation and in turn receive written approval. Funds not used in the manner specified in the Grant Agreement must be returned to the Foundation.

Grant Outcome Evaluation Reports: The Foundation requires that organizations submit a completed Grant Outcome Evaluation Report for any grants previously awarded by the Foundation before a new grant application will be considered. Grant Outcome Evaluation Reports are due within one year of the grant's award date.

OTHER

As a matter of fairness to all applicants and as a courtesy to the Monterey Peninsula Foundation, all questions about applying for a grant should be directed to the Foundation's Director of Grant Programs. It is not necessary or advantageous for your Board or staff members to meet personally with Foundation staff, Board or Grant Committee members before applying for a grant.

Steps for Submitting a Grant Application

Step 1: Determine if your organization is eligible

To be considered for funding, an applicant must be designated as a nonprofit, tax exempt “charitable organization” (without private foundation status) or a school or public agency, conduct programs within our focus areas and in our geographic funding area. The applicant should also be current on all reports due to the Foundation for any previous grants.

Step 2: Submit a grant application and the necessary attachments

Complete the **Monterey County Area Grantmakers Common Grant Application** and include the necessary attachments. You will need to send one copy of the complete grant application package:

- A completed Common Grant Application Checklist
- A completed Common Grant Application Form
- Additional information required as listed on the Common Grant Application Checklist

You may download the Monterey County Area Grantmakers Common Grant Application from our website, www.montereypeninsulafoundation.org or call to obtain the forms (831-649-1533, x230). Supporting materials submitted as part of your grant application cannot be returned. The Foundation does not accept DVDs, CDs or videotapes. Please do not submit any materials for which you do not have a copy. Please do not submit your grant application in a binder or folder.

Applications may be mailed to or dropped off at the Foundation’s office. Please call (831-649-1533) before coming to the office to ensure someone is present to accept your grant application. Faxed applications are not accepted.

The Monterey Peninsula Foundation accepts grant applications via e-mail. Please refer to the Common Grant Application for instructions to submit grant applications via e-mail.

GUIDELINES FOR APPLICANTS

- ✓ Send one complete copy of your grant application.
- ✓ Use standard typeface no smaller than 11 points. Use 1” margins.
- ✓ Use 8 ½ x 11” white paper only. Print your application single-sided.
- ✓ Do not bind your application or put your application in a presentation folder.
- ✓ Clip the application together with a single clip. Do not staple any portion of the application.
- ✓ Faxed applications are not accepted.
- ✓ If submitting your application via e-mail, refer to the instructions in the Monterey County Area Grantmakers Common Grant Application.

Frequently Asked Questions

Q: How do I know if my organization is eligible for a grant from the Monterey Peninsula Foundation?

A: We award grants to tax-exempt organizations classified as 501(c)(3) nonprofit organizations - public charities as defined by the Internal Revenue Service (not classified as a private foundation), schools and public agencies. Priority is given to organizations located in Monterey, Santa Cruz and San Benito Counties in Central California, with limited grants to organizations in Northern California.

Q: What are the Monterey Peninsula Foundation's areas of giving?

A: Arts & Culture, Community & Environment, Education, Health & Human Services, and Youth.

Q: My organization doesn't have its IRS 501(c)(3) letter yet but we have applied for it. Can we still submit a grant application?

A: The Foundation can only provide support to nonprofit organizations that have officially been designated as such by the IRS, schools and public agencies. Also, the Foundation only considers requests from nonprofit organizations that have been in existence for at least three years.

Q: What kinds of projects will the Foundation consider?

A: Capital projects, programs, and operating support.

Q: What are the deadlines for submitting a grant application?

A: There are currently no deadlines; the Foundation accepts grant applications throughout the year. We review grant applications on an ongoing schedule, so you may submit your application whenever it is ready. Please note that grant funding decisions are not made from January - March due to coordination of the AT&T Pebble Beach National Pro-Am golf tournament. Applicants may submit an application during that time period and it may be reviewed for completeness and eligibility, but determination of any funding will be deferred until after the tournament. Applicants should expect 90-180 days for grant application and determination of funding.

Q: Where do I send a completed grant application?

A: Applications may be mailed to or dropped off at the Foundation's office. Please call (831-649-1533) before coming to the office to ensure someone is present to accept your grant application. Faxed applications are not accepted.

The Monterey Peninsula Foundation
Attention: Grant Programs
1 Lower Ragsdale Drive, Bldg. 3, Ste. 100
Monterey, CA 93940

Q: Can applications be submitted by e-mail?

A: The Monterey Peninsula Foundation accepts grant applications via e-mail. Please refer to the Common Grant Application for instructions to submit grant applications via e-mail.

Q: What is an appropriate request amount? Is there a maximum grant size?

A: The amount that you request from the Foundation should be proportional to your organizational budget, project budget, and expected income from other sources. While there are no restrictions for the maximum grant amount applicants may request, the Foundation will take into consideration the applicant's track record in implementing projects of a similar size and scope. It is also expected that there will be other sources of support for the project.

Q: If I have questions before submitting my grant application, who should I contact?

A: All inquiries about grant applications should be directed to the Director of Grant Programs.

Q: Can I receive funds from the Monterey Peninsula Foundation if I have a personal dire need?

A: The Monterey Peninsula Foundation does not make grants or loans to individuals.

Q: How long does it take once a grant application is submitted to go through the review process?

A: After a complete (all submitted materials are current and complete according to the directions) grant application is received, the Foundation Grant Programs staff and Grant Committee review it. As a result of the initial review, a request for additional information from your organization may be required. Site visits may occur after a grant application is determined to be complete. A site visit by the Foundation staff or Grant Committee does not guarantee funding approval. If a grant application does not meet the criteria of the Foundation, the applicant will be notified immediately. Applicants should expect 90 -180 days for grant application review and determination of any funding.

Q: My organization received a grant from the Monterey Peninsula Foundation last year. May I apply for a new grant?

A: Yes, unless your organization received a multi-year grant. Each eligible organization may submit one grant application in a twelve-month period. The Foundation also requires that applicants submit a completed Grant Outcome Evaluation Report for any grants previously awarded by the Foundation before new grant applications will be accepted for review. Grant Outcome Evaluation Reports are due within one year of the grant's award date.

Q: What are our responsibilities if my organization receives a grant?

A: If the grant application is approved for funding, the Foundation will send a Grant Agreement outlining the terms and conditions of the grant, which must be signed by an authorized management official of the grantee and returned to the Foundation. The recipient of any grant from the Foundation must use the funds awarded for the specific purpose of the original intent. The Foundation requires detailed accounting of the grant funds as part of the Grant Outcome Evaluation Report that must be submitted one year from receipt of the grant.

Q: What if our program or funding results change after we receive a grant and we'd like to request a revised use for our grant funds?

A: Funds not used in the manner specified in the Grant Agreement must be returned to the Foundation or be approved for reallocation by the Foundation. Any requests for a revision in use of funds must be submitted in writing to the Foundation and in turn receive written approval.

Q: Can anyone at the Monterey Peninsula Foundation help me write a grant application?

A: We do not provide assistance with writing grant applications. A good resource for grantwriting workshops and information is the Community Foundation for Monterey County's Management Assistance Program (www.cfmco.org, 831-375-9712).

Q: Can you refer me to anyone else for funding?

A: The Community Foundation for Monterey County publishes a guide to local funders, "Grantmakers Survey." The Foundation Center's "FC Search" resources are available at the Seaside and Salinas (Steinbeck branch) public libraries.

Frequently Asked Questions - The Youth Fund

Q: Can I apply for a grant to both the Youth Fund and the Monterey Peninsula Foundation?

A: No—organizations can apply once in twelve-month period to either the Youth Fund or the Foundation for a grant, with the exception of public and private schools, colleges and universities. Public and private schools serving K-12 can apply more than once per year to the Youth Fund. Colleges and universities may apply separately to the Foundation and the Youth Fund.

Q: How do I decide if my organization should apply to the Foundation or the Youth Fund?

A: Review the Grant Guidelines for both the Foundation and the Youth Fund and determine if your program/project fits within the guidelines and how much funding you need. Youth Fund grants range from \$1,000 – \$10,000. Foundation grants generally range from \$10,000 - \$100,000 and higher for major or capital projects.

Q: What kinds of projects does the Youth Fund support?

1. Special programs at public schools that serve grades K-12
2. School equipment for needy youth at private schools that serve grades K-12
3. Special programs and/or supplies for youth organizations
4. Team uniforms and equipment for boys' and girls' (K-12) athletic teams (i.e. Little League, Pop Warner Football league, etc.)
5. Scholarships or financial aid for Monterey County Junior Colleges and four-year universities, and limited scholarships for needy students at the K-12 level
6. Equipment and supplies for organizations that support mentally and physically challenged children
7. Drug or alcohol counseling for youth
8. Youth symphony concerts, youth music festivals, youth theater groups, and musical performances geared towards youth, and art classes for youth
9. Instruments, uniforms, and equipment for youth orchestras and bands
10. General youth programs

The Youth Fund does not support salaries for teachers or school employees.

Q: How do I apply for a grant from the Youth Fund?

Applicants to the Youth Fund should use the Youth Fund Application (NOT the Monterey County Area Grantmakers Common Grant Application).

1. Review the Youth Fund Grant Guidelines
2. If your organization is eligible, submit the necessary materials. A grant application (printed on 8 ½ x 11" paper, one-sided) should include all items listed below:
 - A completed Youth Fund Grant Application Form (two pages)
 - Additional information required as listed on the Youth Fund Grant Application Checklist, including a completed Grant Outcome Evaluation Report for a grant previously awarded by the Foundation

You may download the **Youth Fund Grant Guidelines and Application Form** from our website, www.montereypeninsulafoundation.org or call to obtain the forms (831-649-1533, x230).

Q: What are the deadlines for submitting a grant application to the Youth Fund and requirements if funded?

A: There are currently no deadlines; the Foundation accepts grant applications throughout the year. We review grant applications on an ongoing schedule, so you may submit your application whenever it is ready. Please note that grant funding decisions are not made from December - March due to coordination of the AT&T Pebble Beach National Pro-Am golf tournament. Applicants may submit an application during that time period and it may be reviewed for completeness and eligibility, but determination of any funding will be deferred until after the tournament.

If the grant application is approved for funding, the Foundation will send a Grant Letter outlining the terms and conditions of the grant, which must be signed by an authorized management official of the grantee and returned to the Foundation. The recipient of any grant from the Foundation must use the funds awarded for the specific purpose of the original intent. The Foundation requires detailed accounting of all funds awarded as part of the Grant Outcome Evaluation Report that must be submitted one year from receipt of the grant.

Q: How long does it take once a grant application is submitted to go through the review process?

A: After a complete (all submitted materials are current and complete according to the directions) grant application is received, the Foundation forwards the application to a member of the Youth Fund Grant Committee who reviews it for discussion with the entire Committee. Committee members may conduct site visits with the applicants or call the applicants with questions. A site visit or call by a Youth Fund Grant Committee member does not guarantee funding approval. If a grant application does not meet the criteria of the Youth Fund, the applicant will be notified immediately. Applicants should expect 90 -180 days for grant application review and determination of any funding.



1 Lower Ragsdale Drive
Building 3, Suite 100
Monterey, CA 93940
t 831 649 1533
f 831 649 1763

www.montereypeninsulafoundation.org