Developing Projects for Public Funding

CEMI Grants Program 2024 - Round 2 Request for Proposals

San Joaquin Community Foundation and Edge Collaborative

Program Overview and Information

BACKGROUND

As part of the post-pandemic recovery efforts, federal, state, and local governments have announced many new public funding opportunities to promote inclusive and resilient economic reinvestment. With significant public funding becoming available, organizations in San Joaquin County have an unprecedented opportunity to leverage these programs to benefit our local area.

In partnership with The Center at Sierra Health Foundation's [Community Economic Mobilization Initiative (CEMI)](#), **San Joaquin Community Foundation** and **Edge Collaborative** are proud to launch a countywide philanthropic grantmaking initiative to assist eligible organizations in building their knowledge and capacity to participate in upcoming local, state, and federal funding and planning opportunities. This is a $1.6M one-time funding opportunity, broken out into three rounds.

This represents the second CEMI funding round. While the first round focused on organizational capacity building, this one prioritizes **specific projects that are further along and aims to support project pre-development[1] and provide funding so organizations can prepare applications for specific public funding opportunities.**

More information on the organizational capacity building round and the countywide CEMI initiative can be found on the San Joaquin Community Foundation's [CEMI webpage.](#)

REQUEST FOR PROPOSALS

The purpose of this Request for Proposals (RFP) is to support eligible organizations so they may focus on at least one of the following activities:

- Develop projects and/or grant applications that could be competitive for specific local, state, and federal funding opportunities either alone or in partnership with another organization
- Support planning and/or efforts to align community benefits to existing or proposed projects
- Cultivate and/or finalize strategic partnerships with other institutions in the county to improve the overall competitiveness of one or more local, state, and federal funding opportunities (i.e., develop a partnership with a larger organization with the financial

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[1] According to the [Milken Institute](#), project pre-development can be defined as "the funding that pays for tasks that need to be completed before construction occurs, such as architectural and engineering work, market assessments and economic feasibility studies, site/lease acquisition costs, business plan writing, and permitting…predevelopment funding is often the overlooked "secret sauce" for making community-led projects practical."

management and reporting capacity to manage public grants OR with a community-based organization with a track record and key relationships with residents and neighborhood leaders.

Please note: to be eligible for this RFP, **you must have an identified call for funding and/or a specific funding stream to demonstrate that your project is aligned with public funding opportunities**. You will be asked to upload a PDF of that public funding opportunity in the application.

There will also be an informational webinar regarding this funding opportunity on **Tuesday, Jan 30th at 10am** through Zoom. Please register for that meeting here. The meeting will be recorded and sent to those that register. It will also be posted on the SJCF CEMI webpage. Questions from that webinar and any other questions will be added to a Frequently Asked Questions document posted on the SJCF CEMI webpage. If you have questions about this funding opportunity, please email cemi@sanjoaquincf.org.

AVAILABLE FUNDING FOR THIS PROGRAM
As part of a $1.6 million grant from the Community Economic Mobilization Initiative (CEMI)—a program funded by The Center at Sierra Health Foundation--Edge Collaborative and San Joaquin Community Foundation are allocating up to **$900,000 total** for this round to re-grant to eligible organizations.

An eligible organization may request a maximum of **$100,000 in grant funding if applying alone**. Applicants representing collaborations of at **least two organizations may apply for up to $250,000**. These are the maximum amounts available, meant for organizations applying for large public investments. Please use your overall project size and size of public funding opportunity to request an appropriate amount.

We may not be able to meet all funding needs in this round, but we will try to fund organizations that are a good fit at the highest level possible, which may result in partial awards.

WHO MAY APPLY – ELIGIBLE ORGANIZATIONS
Organizations that are eligible to apply for grant funding through this RFP are:
a. Nonprofit organizations that are tax-exempt under Section 501(c)(3) of the Internal Revenue Code, classified as a public charity, not as a "private foundation" under section 509(a), and are designated a 509(a)(1) or 509(a)(2) organization.
b. Labor, Agricultural, or Horticultural organizations that are tax-exempt under Section 501(c)(5) of the Internal Revenue Code.
c. Chambers of Commerce and private business represented by Boards of Trade that are tax-exempt under Section 501(c)(6) of the Internal Revenue Code.
d. Local public education agencies such as K-12 public school districts, community colleges, and public universities.
e. An instrumentality of local government, such as a municipality or county.

f. An unincorporated organization fiscally sponsored by a nonprofit organization that is tax-exempt under Section 501(c)(3) of the Internal Revenue Code, classified as a public charity, not as a "private foundation" under Section 509(a), and is designated a 509(a)(1) or 509(a)(2) organization.

g. A private company or business proposing a project that will have tangible charitable benefits for disadvantaged communities OR is a certified B-Corp.

In addition, Eligible Organizations must have an existing footprint in San Joaquin County (i.e., have an office address or program in San Joaquin County). Collaborations or a consortium of organizations are encouraged to apply together; however, only the lead applicant must be an Eligible Organization.

WHAT WE FUND – ELIGIBLE EXPENSES

Eligible Organizations must demonstrate how the funds they are requesting will achieve one or more of the following:

- Develop projects and/or grant applications that could be competitive for specific local, state, and federal funding opportunities either alone or in partnership with another organization
- Support planning and/or efforts to align community benefits to existing or proposed projects
- Cultivate and/or finalize strategic partnerships with other institutions in the county to improve the overall competitiveness of one or more local, state, and federal funding opportunities (i.e., develop a partnership with a larger organization with the financial management and reporting capacity to manage public grants OR with a community-based organization with a track record and key relationships with residents and neighborhood leaders.

We know that applying for and administering government grants is expensive and comes with a deep administrative burden. Our goal is to be flexible in our funding awards to meet the goals above.

Expenses (direct or indirect) that you can tie to your application and/or administration of these funds are acceptable, including expenses other grants may consider general operating. For example, government grants may require more insurance, a more detailed financial reporting system, or a more robust data collection system.

Some possible examples of eligible uses include:
a. Hiring full-time or part-time staff, transitioning volunteers to paid staff, hiring consultants, and/or offsetting existing staff costs for the following purposes:
   o Researching and writing the public funding opportunity
   o Developing partnerships & MOUs with collaborators, and/or other related activities to plan, apply for, and manage the public funding opportunity.
   o Conducting and coordinating planning or project development work to prepare for a

specific public funding opportunity.
- o Participating in local public planning or investment conversations (e.g., providing public comment on regional policies, engaging in CERF planning conversations)
- o Cultivating and/or finalizing partnerships, including meeting planning expenses and meals
b. Project development expenses, including furthering projects for prospective funding opportunities and more equitable execution of already awarded publicly funded projects. Possible examples of eligible uses include:
- o Sub bullets in (a) that further specific projects aligned to public investment
- o Crafting project scope in relation to the goals of partnering organizations
- o Deepening the project's community engagement
- o Defining workforce needs (job pathways, recruitment, etc.) of the project
- o Determining community benefits and other equity-oriented priorities of the project
c. Strategic planning initiatives to invest reporting through data and performance evaluation measures to position an organization to apply for or administer public funding.
d. Travel expenses and registration costs to get training on local legislative and investment initiatives or professional development, including grant writing or management training for existing staff.
e. Hosting meetings/trainings for residents to educate them on project and public investment opportunities and gathering community input, including stipends to residents and other meeting costs, including meals
f. Developing training materials to educate residents, partners, and elected officials on projects and how they will impact the local community.
g. Purchasing business software, insurance costs, equipment, and/or other technology to prepare an organization to manage a public grant adequately.

WHAT PROPOSALS QUALIFY – ELIGIBLE FUNDING OPPORTUNITIES

To be eligible for this RFP, you must have an identified call for funding and/or a specific upcoming funding stream to demonstrate that your project is aligned with public funding opportunities.

If your project proposal for this RFP is to support planning and/or efforts to align community benefits to existing or proposed projects, you must attach:
- a previously applied for and/or received public funding opportunity

If your project proposal for this RFP is to develop projects that could be competitive for specific local, state, and federal funding opportunities either alone or in partnership with another organization OR cultivate and/or finalize strategic partnerships with other institutions in the county to improve the overall competitiveness of one or more local, state, and federal funding opportunities, you must attach:
- a Notice of Funding Opportunity
- a press release of an upcoming funding opportunity
- proof of a rolling funding opportunity (e.g. a California state funding program that comes up each year)

Your project and the public funding opportunity should be aligned to one of the following priority areas: arts and cultural institutions, climate change/mitigation, clean energy/efficiency, community safety, economic development (revitalization of neighborhoods, districts, corridors, etc), education, food security, health and healthcare (behavioral health, public health, etc.), housing (affordable housing, market-rate housing, emergency shelters, homelessness), property and development (real estate, blight, brownfields, etc), racial/social justice, environmental health (air quality, water, sustainable agriculture, pollution remediation, etc), transportation, workforce development.

WHAT WE DON'T FUND – INELIGIBLE EXPENSES
Expenses not directly associated with achieving the program's goals will be ineligible and likely include the following examples:
- Lobbying or political activities.
- Retroactive reimbursement of expenses before the start of the grant period.
- Capital expenditures, such as the purchase of land or office space.
- Startup costs for organizations seeking nonprofit status.
- Fundraising events.
- Debt obligations.

SELECTION CRITERIA
Proposals will be evaluated based on:
- The strength of the narrative about the proposed use of funding and the connection to achieving the grant program goal of accessing and managing specific public funding opportunities.
- Clarity and specificity of the proposed project and demonstrated progress made toward bringing the proposed project to fruition, including outlining the potential for positive social impact.
- Overall competitiveness of the proposed project to win funding given the current public funding landscape
  - Is the proposed project related and competitive to a specific public funding opportunity released or an identified public funding priority?
  - Does the project offer the potential for leveraging large public funding (e.g., climate, infrastructure, etc)?
- Clarity and specificity about the connection between your organization's/collaboration's mission/vision/values/experience and the desire to apply for and manage public funding

In addition, preference in the proposal review process will be given to funding organizations that demonstrate a commitment to the following:
- **DEMONSTRATED COMMITMENT TO COMMUNITY ENGAGEMENT, EQUITY, AND**

DISADVANTAGED[2] COMMUNITIES, POPULATIONS, AND GEOGRAPHIES– Primarily serving disadvantaged communities, populations, and geographies and involving direct community member input and representation from those groups to address equity issues.
- **CULTIVATION OF PARTNERSHIPS TO DATE** – Working with other organizations in the community to increase the strategic impact of a public funding opportunity.
- **EXPERIENCE WITH AND CAPACITY TO EXECUTE AND MANAGE LARGE PUBLIC GRANTS OF ANY INVOLVED PARTNER** – individual organizations or collaborations with demonstrated capacity to and experience managing and reporting public grants.

PROPOSAL REVIEW TIMELINE AND NOTIFICATION OF AWARDS
Proposals will be accepted online through the San Joaquin Community Foundation's Online Grants Portal beginning **Wednesday, January 31, 2024**. The proposal submission deadline will be **Friday, April 26, 2024 at 5:00 p.m.** Funding decisions will be announced no later than **May 17, 2024.**

TIMEFRAME FOR GRANT FUNDING
The timeframe to expend grant funding is 12 months from the date of execution of a grant agreement, with the possibility of extending the term to pursue a funding opportunity. The timeline for disbursement of funds to awardees is as follows:
- Draft grant agreements provided to grantees: by **two weeks after funding decision announced**
- Signed Grant Agreements due to the Foundation: by **two weeks after draft grant agreements sent**
- Grant funds are available to grantees via check or ACH **within three weeks of submitting a signed grant agreement to the Foundation.**

REPORTING REQUIREMENTS
If your organization is awarded a grant, a minimal final report will be due 12 months after date of the signed grant agreement requesting a written response to the following questions:
- Describe how your organization used the grant funding to apply for a specific public funding opportunities. Were you awarded funding? Why or why not?
- What was the outcome and impact of this funding for your organization, the project, and potentially, the community? Please describe both quantitative and qualitative impacts.

Organizations may be invited to 1-2 meetings during the contract year to give feedback on progress and share continuing needs around this work.

HOW TO SUBMIT A PROPOSAL
The application questions are printed on the next few pages of this RFP for review. Applications will only be accepted through online application. The SJCF Grants Portal will open on **Wed. Jan. 31, 2024** for this grant opportunity. Please follow the directions below to submit your application.

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[2] Please note that throughout this RFP, we use "disadvantaged communities" to align with the State of California's language. The State defines these communities as, "the areas throughout California which most suffer from a combination of economic, health, and environmental burdens. These burdens include poverty, high unemployment, air and water pollution, presence of hazardous wastes as well as high incidence of asthma and heart disease." You can read more about the definition here.

1. Go to website: sanjoaquincf.org/grantsportal
2. Enter Username (email address) and Password, or click on Create New Account if you have not set up an account in our system.
3. Click on "apply" at the top left of the screen next to the home icon.
4. This application will appear. Click on the blue "Apply" button to begin the application process or to return to the draft application.

For questions about applying for this grant opportunity, please email cemi@sanjoaquincf.org.
Reminder: Grant applications are due on Friday, April 26, 2024 at 5pm.

The submission of a grant proposal is the final step in seeking grant funding from this program. An Advisory Committee, composed of two staff, one community leader, and a subject matter expert on public funding, will review completed grant proposals and recommend whether the proposal should be funded fully, partially, or if the proposal will be denied. Grant funding determinations will be made by the Foundation's Board of Directors upon recommendation by the Advisory Committee. Decisions made by the Board of Directors are final.

Organizational Background

Lead Applicant Organization Name*

Please state the name of the applicant organization applying for grant funding. *(If this proposal involves multiple organizations, please state the name of the lead organization. The lead applicant will be responsible for receipt of funding, executing subcontracts, and completing mid and final grant reports).*
Character Limit: 250

Name of Partner Organization #1 (not the lead applicant)
Please state the name of the partner organizations applying in collaboration with the lead applicant.

Name of Partner Organization #2
Please state the name of the partner organizations applying in collaboration with the lead applicant.

Name of Partner Organization #3
Please state the name of the partner organizations applying in collaboration with the lead applicant.

Name of Partner Organization #4
Please state the name of the partner organizations applying in collaboration with the lead applicant.

Lead Applicant Organization Type*

Please indicate the type of organization applying for grant funding. *(If this project involves multiple partnering organizations, please specify the type for the lead organization).*

Choices

a. Nonprofit organizations that are tax-exempt under Section 501(c)(3) of the Internal Revenue Code, classified as a public charity, not as a "private foundation" under section 509(a), and are designated a 509(a)(1) or 509(a)(2) organization.
b. Labor, Agricultural, or Horticultural organizations that are tax-exempt under Section 501(c)(5) of the Internal Revenue Code.
c. Chambers of Commerce and private business represented by Boards of Trade that are tax-exempt under Section 501(c)(6) of the Internal Revenue Code.
d. Local public education agencies such as K-12 public school districts, community colleges, and public universities.
e. An instrumentality of local government, such as a municipality or county.
f. An unincorporated organization fiscally sponsored by a nonprofit organization that is tax-exempt under Section 501(c)(3) of the Internal Revenue Code, classified as a public charity, not as a "private foundation" under Section 509(a), and is designated a 509(a)(1) or 509(a)(2) organization.
g. A private company or business proposing a project that will have tangible charitable benefits for disadvantaged communities OR is a certified B-Corp.

Organization Mission and Vision*

Please state the mission and vision of the applicant organization.

Character Limit: 500

Geographic Area(s) Served*

Please mark all applicable areas that the applicant organization serves.

Choices

Stockton
Lodi
Escalon
Lathrop
Manteca
Ripon
Tracy
Unincorporated San Joaquin County

Target Population Description*

Please identify any specific disadvantaged communities the applicant organization serves (e.g., specific demographic groups or geographic communities). Please state if the applicant organization serves a specific neighborhood(s) to address equity.

Character Limit: 750

Operating Budget*

Please state the current fiscal year's operating budget for the applicant organization. An operating budget is your organization's annual projected revenue and expenses, including staffing, overhead, and program costs.
Character Limit: 500

Staffing*

Please state the current number of employees of the applicant organization that are full-time equivalent, part-time equivalent, and regular volunteers.
Character Limit: 500

Staffing Composition*

Do the majority (more than 50%) of the applicant organization's employees identify as BIPOC?

Choices

Yes

No

Proposal Description

Public funding alignment*

To be eligible for this RFP, you must have an identified call for funding and/or a specific upcoming funding stream to demonstrate that your project is aligned with public funding opportunities. Please see the RFP language for examples of documentation. You must upload a single PDF of one or more of the following, demonstrating the public funding opportunity you are planning to apply to. The PDF can contain multiple documents together, if needed.

Your project and the public funding opportunity should be aligned to one of the following priority areas: arts and cultural institutions, climate change/mitigation, clean energy/efficiency, community safety, economic development (revitalization of neighborhoods, districts, corridors, etc), education, food security, health and healthcare (behavioral health, public health, etc.), housing (affordable housing, market-rate housing, emergency shelters, homelessness), property and development (real estate, blight, brownfields, etc), racial/social justice, environmental health (air quality, water, sustainable agriculture, pollution remediation, etc), transportation, workforce development. Please answer the following questions for each public funding opportunity submitted.

- Why is your organization/collaboration and proposed project competitive for this public funding opportunity? Why are you and your proposed project uniquely positioned for this award? Please explain.

- Hypothetically, why wouldn't your organization/collaboration be awarded this public funding opportunity? What are the possible reasons you might not win funding? How do you anticipate planning for and addressing these potential challenges?

Character Limit: 3500

Proposal Description*

Describe the specifics of the project/collaboration relevant to this application, detailing:

- your proposed project and its potential for positive social impact (and meeting the needs of San Joaquin County and its local communities), as well as its alignment to priority funding areas listed in the question above.
- progress made on your proposed project to date, including any public funding applied for and/or received
- confirmed partnerships to support the project's application and/or execution
- how the budget will support your organization/collaboration to apply for public funding to support bringing this proposed project to fruition, including a description of how indirect costs will bolster your capacity
- your organization/collaboration's capabilities, skills, and experience to effectively lead and manage your proposed project
- how your organization/collaboration's mission, vision, history, and values align and connect to your proposed project and your desire to apply for public funding
- anticipated challenges and barriers to executing both this grant (if awarded) and your proposed project
- if and how this grant will further equity within the community
  *Note: Although previous experience winning and managing public funding is helpful, it is not a requirement to apply for this grant.

Character Limit: 5000

Partnerships and Collaborations (optional)

Detail any partnerships or collaborations your organization plans to support the project. If your partnerships are confirmed and detailed in the above, you do not need to fill out this section. If partnerships are prospective rather than final, please describe them here. This could include working with consultants, other nonprofits, or community organizations.

Character Limit: 1000

Past Experience and Capacity*

- How has your organization or collaboration engaged with and/or provided services, project development, policy, or advocacy work to or with disadvantaged communities in the past?
- Have you or any organization in your collaboration applied, received, and/or administered public funding in the past, either as a primary applicant or subgrantee?
  - If so, please describe your previous experience applying, receiving, and/or

administering public funding.
- ○ If not, please describe why your organization/collaboration is prepared and/or ready for public funding and/or how this grant will help you prepare and/or get ready for public funding.

Character Limit: 3500

Future funding needs (optional)

This question **does not affect the review or competitiveness of this application**, but serves as information gathering for potential future funding rounds.

If awarded public funding, please indicate which of these your organization/collaboration would need. Check each that applies. If you know further details about what may be needed (e.g. approximate amount, details of additional funding needs), please share them here.

Choices
- Match capital to meet the requirements of a public funding opportunity (e.g. a 20% federal match)
- Bridge loan to cover upfront costs on a grant that is awarded on a reimbursement basis
- Other loan (provide detail below)

Proposal Budget Background

Amount of Grant Funding Requested*

Please state the amount of grant funding being requested. *(Amount should not exceed $100,000 for a single organization and $250,000 for a collaboration consisting of at least two organizations--consultants and TA providers do not count towards being a second organization).*

Character Limit: 20

Project Budget Template*
Attach populated template

Supporting Documents

Most Recent Audited Financial Statement*

Please submit the most recent Audited Financial Statement of the applicant organization if required of the organization under state law. If you are applying under a fiscal agent, please provide their information.

Nonprofits: If the applicant organization is required to have audited financial statements, please upload the most recent audited financial statement below. If the applicant organization is not

required to have audited financial statements, please submit the organization's most recent 990 tax return. If you are applying under a fiscal agent, please provide their information.
Private businesses: Please update a copy of your most recent tax returns.

File Size Limit: 10 MB

Applicant Acknowledgement

Acknowledgment*

Please mark here to indicate that the applicant has read and understands the program's Overview, Eligibility Criteria, and Submission Deadline and that the information contained in this application is true and correct as of the submission date.

Choices

The applicant hereby acknowledges the above.

PROJECT BUDGET FORM

Organization Name:

Project Name:

PROJECT EXPENSES (Please edit descriptions as necessary)				Total Project Expense	NOTES
Personnel					
Facilities/Occupancy					
Equipment/Supplies					
Printing/Promotion					
Meeting/Travel					
Administrative Expenses					
Other (specify)					
Other (specify)					
Other (specify)					
		TOTAL PROJECT EXPENSES:		$ -	

SOURCES OF PROJECT FUNDING (Please edit descriptions as necessary)	**Funding Secured:** Note below the total amount of funding "secured"	**Funding Applied for:** Note below the total amount of funding "applied for"		Total Sources of Project Funding	**NOTES:** Please make note below of any matching funds that are "In-Kind" or "In-Cash"
Community Foundation			=	$ -	
Other Foundations			=	$ -	
Corporations			=	$ -	
Individuals			=	$ -	
Government Grants			=	$ -	
Other (specify)			=	$ -	
Other (specify)			=	$ -	
Other (specify)			=	$ -	
Other (specify)			=	$ -	
Other (specify)			=	$ -	
Other (specify)			=	$ -	
Other (specify)			=	$ -	
Other (specify)			=	$ -	
Other (specify)			=	$ -	
		TOTAL PROJECT FUNDING:		$ -	

*Total Project Expenses must equal Total Project Funding