Community Foundation for Greater Atlanta



## Completing the Common Grant Application:

- **Access to the Form:** Beginning in 2016, Organizations will be asked to complete an Organizational Profile and Common Grant Application through the Foundation's online Nonprofit Online Portal in order to be eligible for any of the Foundation's competitive grantmaking opportunities.

- **Recommended Internet Browser:** Please make sure to use the Google Chrome web browser when accessing the application. Other web browsers do not work as well. If you do not currently have Google Chrome installed, you can download it here.

- **Navigating the Common Grant Application Form:** With your mouse, left click the boxes to activate the drop-down menus or to type in or paste in your answers. Use the Tab key or your mouse to go to the next line or section.

- **Format Rules:** You will have to adhere to the required word limits for written answers. The box titled "Words remaining" will count down the remaining words available as you type.

## Overview

1.1 **How do you measure the effectiveness of your activities?** Provide information about the process the organization uses to assess itself, including its mission-related activities and operations, both in terms of impact and in use of resources. You might consider discussing the kinds of evaluation methods the organization uses, how often activities are reviewed and how you use results to further continuous improvement. Make the connection between how the organization assesses itself and its strategic plan. Remember the Community Foundation is interested in learning about your whole organization; *do not focus only on your mission-related activities*. Provide balanced information about mission-related activities AND operations.

1.2 **Describe the results achieved within the past 12 months or as outlined in your strategic plan.** The Foundation is interested in learning about the organization's accomplishments toward goals outlined in your organization's strategic plan. Provide specific examples of what the organization accomplished in the last 12 months.

1.3 **Has the organization added or eliminated any mission-related activities during the last 12 months? Why?** Describe any new mission-related activities your organization has launched or eliminated within the last 12 months. Explain to the Foundation staff the rationale behind initiating or ceasing to provide activities at this time.

1.4 **What are the organization's opportunities and new initiatives over the next 12 months? How are you planning to address them?** This question asks you to reflect on the opportunities your organization has in the near term. Discuss any changes within the organization that are likely to occur going forward and how staff and board plan to adapt to and address these changes; this question does not ask you to reflect on the past. Be sure to address any financial implications associated with opportunities and new initiatives.

**1.5 What are the organization's challenges or threats over the next 12 months? How are you planning to address them?** This question asks you to reflect on challenges and threats the organization is facing in the near term. In your answer, be sure to outline how staff and board plan to address these challenges; this question does not ask you to reflect on the past. Be sure to address any financial implications associated with challenges and threats.

**1.6 Does the organization own a building (or multiple buildings) or lease?** Identify if the organization owns or leases their current building.

**1.7 If leasing, how long is the lease in months? (only required if applicant chooses "Lease" above)** Identify how many long the current terms of your organization's lease are in months.

**1.8 Describe what management consulting services to strengthen the organization as a whole would be of use to the organization, its staff and board members in the coming 12 months.** Are there areas in which your organization could benefit from consulting services? Your answer informs the Foundation's efforts in its Nonprofit Effectiveness Impact Area.

**1.9 Organization's Secretary of State Control #:** The Foundation needs you to verify that your organization's registration with the Georgia Secretary of State is current. Click here to verify

## Fiscal Management

**2.1 Financial Snapshot**

- **Total Revenue:** Identify your organization's total revenue. Total revenue includes:
  - **Earned Revenue:** Revenue or income that an organization receives in exchange for a service or product. Payments can be made by the direct beneficiary or recipient (for example, tuition or performance ticket) or by a third party (for example, performance-based government contracts).
  - **Contributed Revenue:** Revenue or income received from individual, foundation, corporate or government donations. The donor may make contributions on an unrestricted basis (i.e. not specify the services to be delivered or the timeframe for service delivery) or may impose restrictions for use of the contribution under specific purposes.
- **Total Expenses:** A measure of the total costs associated with managing and operating your organization. These costs consist primarily of management fees, salaries, legal fees and operational expenses; use the total amount AFTER depreciation.
- **Surplus / (Deficit):** The amount that the organization is over or under the total amount budgeted for that fiscal year. Refer to your statement of activities to determine your surplus or deficit and reflect the figure as positive or negative.

- **Net Assets/Fund Balance:** This number can be found on the organization's balance sheet or statement of financial position. N/A or $0 are not acceptable responses; any organization that enters N/A or $0 in this field will be deemed ineligible.

- **How did organization report year end financials?** For each of the last three years, indicate how the organization reported its year-end financials (i.e. Audited, Reviewed*). If you have not completed the audit/review for the last fiscal year you are including in the Financial Snapshot, enter figures from your internal financials and select the appropriate option from the drop-down list: Audit (in progress) or Review (in progress). Be sure to select the type of review that is being conducted – either an Audit (in progress) or Review (in progress) – even if it has not been completed; Foundation staff relies on accurate entries in this particular field when selecting organizations to move forward in competitive grantmaking processes.*

- **Fiscal year (FY) end date:** For each year (in each column), indicate the full date on which the organization's fiscal year ended (e.g. 6/30/16).

**2.2 Clarification on Financial Snapshot: Provide an explanation regarding significant surpluses, deficits, debt, etc. as stated above:** Use this space to provide explanations related to figures provided in the financial snapshot. The organization may use this space to explain large jumps or drops in expenses or revenues, a change in fiscal year, significant debt (non-mortgage or mortgage related) or anything else that may not be clear to a reader who does not yet have the organization's full financials to review. The organization can also use this space to briefly mention a capital campaign and the impact of said campaign on the organization's finances. The organization should detail the specific sources of revenue if 'Other (specify)' was selected in the Revenue Sources table. When determining what to explain or clarify, remember that Foundation staff do not know the "story behind the numbers".

**2.3 What is the total amount of non-mortgage debt carried? (Loans, lines of credit, credit cards, etc.)** Indicate the amount of debt the organization currently owes; this includes any loans, lines of credit, credit card balances, etc. and excludes a mortgage on a property. Please total all debt sources and provide a close estimate as to the amount. If you do not have any debt, enter "$0". Accounts payable are NOT considered debt for the purposes of this application.

**2.4 What is the total amount of mortgage debt carried?** Indicate the amount of debt the organization currently owes for a mortgage on a property. If you do not have any mortgage debt, enter "$0".

**2.5 Revenue Sources: Indicate top three sources of <u>operating revenue for the last completed fiscal year</u>; do not include sources of capital funding. If you received significant capital funding, include that information in the clarification section below.** Using the drop down menus, select the top three sources of operating revenue for the last fiscal year. Make sure to include the total amount of that funding and the percent of revenue the source represents. The total percentages **do not** have to total 100.

**2.6 Have you recently launched or in the process of a capital campaign?** At times, Foundation donors want to support nonprofit capital campaigns. Identify if your organization is currently involved in a capital campaign.

## Population Served

**3.1 Number of people served by the organization in the last completed fiscal year:** Provide the number of people your organization served in the last fiscal year.

**3.2 Actual vs. estimated population data:** The Foundation recognizes that many social service and health organizations collect demographic data about the individuals they serve. Other organizations that engage groups of people where a detailed interaction with individuals does not happen may estimate the people they serve.

**3.3 What is the source of these figures?** Identify the source of the population data your organization captures. Please provide the source document for your data, such as intake forms, school records, census data, etc.

**3.4 How do you collect population data?** Identify how the organization manages the collection of data (e.g. physical surveys, online forms). Are the sources accurate or is the data estimated? If your figures are estimated, provide an explanation for your organization not being able to provide actual figures.

**3.5 Race/Ethnicity & Gender:** The Foundation is interested in learning more about the people your organization serves. Identify the demographic information in the table in numbers. When you add the "total" column, it should equal the number you entered to question 3.1.

**3.6 Geography:** The Community Foundation serves a 23-county region in North Georgia. The Foundation wants to know the percent of people your organization serves that live INSIDE the 23-county region and in which counties. The *Other county* category is for counties in Georgia outside of the 23-county region. The *Other state* category is for people the organization serves that live anywhere outside Georgia. The *No data* category allows you to indicate any individuals served whose data you do not have or were unable to obtain.

**3.7 List characteristics important to note about the population served by the organization that are not defined by gender or the races/ethnicities listed above.** **If your organization is located outside of the Foundation's 23-county service area and/or predominantly serves individuals who do not reside within the Foundation's service area, please provide the geographic information in your response below.* This question gives applicants the opportunity to identify characteristics of the population(s) it serves that are not associated with race/ethnicity, gender, age or place of residence. These characteristics could include level of income, immigrant or refugee status, levels of physical, mental or developmental disability or sexual orientation. *As noted, you should provide information about where your organization's clients reside if they live outside the Foundation's 23-county service area.*

## Human Resources: Paid Staff & Non-Board Volunteers

**4.1 Staff *(full- and part-time staff only)*:** Identify the demographic information in the table. When entering in numbers, count each person, regardless of full-time or part-time status, as an individual. Ensure that those counted in the first table are paid staff members classified as W-2 employees. Employees whose jobs are governed by the Fair Labor Standards Act (FLSA) are either "exempt" or "nonexempt." Nonexempt employees are entitled to overtime pay while exempt employees are not. Refer to the U.S. Department of Labor website for complete information on FLSA: http://www.dol.gov/compliance/laws/comp-flsa.htm. When filling out this section, ensure that these individuals are **paid** full-time or part-time **staff** (classified as W-2 employees); be sure to include exempt and non-exempt staff. Remember to count each individual staff member as one person and to **not** include consultants, contractors or volunteers in this table.

**4.2 Number of paid contractors/consultants:** Enter the number of paid contractors and consultants your organization employs. These individuals should **not** be included in the staff table (4.1). For the purposes of this application, contractors/consultants can include paid interns or fellows.

**4.3 Number of non-board volunteers:** The Foundation is interested in learning how many non-board volunteers your organization interacts with on a regular basis. Enter that figure here. For the purposes of this application, volunteers include unpaid interns or fellows.

**4.4 How does the organization engage volunteers to support its mission-related activities?** Describe the ways in which your organization engages volunteers to achieve its mission. Please make sure to include details on the volunteer recruitment process, how your origination's volunteers are managed and what specific duties they perform. For the purposes of this application, volunteers include unpaid interns or fellows.

## Governance

**5.1 Board giving in the last completed Fiscal Year**

- **Number of board members at the end of the last FY:** Enter the number of individuals on the board at the end of the last fiscal year.

- **Percent of board members who contributed financially (from their own funds?):** Identify the percentage of board members who made financial contributions of their own in the last completed Fiscal Year.

**5.3 Governance Characteristics:** Please note that certain characteristics include two or more parts. Your organization must meet all criteria to mark *Yes*. Please see the Best Practices in Organizational Management section of the Foundation's website for more information.

- **Board's role is formalized and there are job descriptions for board members:** The Foundation is interested in learning if the board's role is defined and structured (evidenced through committee structures and documentation) and if board members have job descriptions to guide them in their duties.

- **Board formally assess itself annually:** The Foundation is interested in learning if the board of directors as a whole assesses itself in a formal manner on an annual basis.

- **Board has a board development plan:** Board development can be defined as the process of identifying, cultivating and nurturing a strong nonprofit board. This includes providing board members with an orientation when they first join the board and ongoing training to ensure the long-term success of the board.

## Partnerships

**6.1 List your organization's top three partnerships, describe the purpose and terms of each:** Identify the organizations, corporations, government agencies, etc. with which the organization partners and describe the nature of those partnerships. *While some relationships with funders are good examples of partnerships, simply receiving funding from another entity does not constitute a partnership.* Refer to the Best Practices in Organizational Management section of the Foundation's website for information on how the Foundation defines partnerships.

## Submitting your Common Grant Application

- **Deadline:** Common Grant Applications are accepted at any time, but they must be completed in advance of any competitive grant program application deadline for an organization to be eligible for funding.
- **Blank Fields:** All fields must have information entered within for the system to recognize that the Common Grant Application is complete and for you to successfully submit it. **If a question is not pertinent to your organization enter "n/a" for text fields or "0" for numeric fields.**

## Questions?

**For questions about or troubleshooting the Nonprofit Online Portal, please contact one of the following staff members at 404.688.5525:**

- Anna Theodore, Grants Associate (atheodore@cfgreateratlanta.org)
- Hannah Klemm, Program Assistant (hklemm@cfgreateratlanta.org)