

Chan Zuckerberg Initiative

Community Fund Paper Application Guidelines

How to submit a paper application:

- Download and print this PDF application packet
- Complete each section using the prompts in a word document or compatible format. Be sure to adhere to character limits.
- Print and attach all budget documents
- Print and attach fiscal sponsor/agent letter, if applicable
- Complete and sign the application checklist and cover sheet

Please mail paper applications to:

CZI
ATTN: Community Team
PO Box 8040
Redwood City, CA 94063

Note that we will not review letters of reference or supplemental application materials. Please only include what is asked.

Application Checklist and Cover Sheet: please print, sign and include this document in your application material

Organization Name:

Primary Contact Name:

Primary Contact Phone:

Return address:

- I have completed all **required sections** of the application
- I have uploaded **all required budget documents**
- Given the volume of applications, program staff at CZI will not be able to follow up on missing application materials. I understand that I will not be contacted if I am missing application materials.

From time to time, our partners ask for information about Community Fund applicants. Are you comfortable with CZI sharing your full applications -- including your organization's name, contact information, application details, and budget documents with other funders if asked?

- Yes, please share with other funders, if prompted**
- No, please do not share our application with other funders**

I understand that all applications will be reviewed by CZI staff and evaluated based on the eligibility requirements and fund criteria. Recipients will be notified in January 2020. All grants will be 1-year and have a grant period of January 2020 - December 2020. **We will not review handwritten applications.** Paper applications need to be postmarked by **September 12, 2019**

Primary Contact Initials:

About the CZI Community Fund

The CZI Community Fund supports local organizations to address basic and most urgent needs identified by the community. The 2020 CZI Community Fund will focus on organizations providing services and support to the communities of Belle Haven, East Palo Alto, North Fair Oaks, and Redwood City.

The application is due on **September 13, 2019, at 4 pm PT**. If you need special assistance with this application, please contact community@chanzuckerberg.com at least seven business days before the application is due.

Fund Criteria

All proposals will be evaluated based on the following criteria:

- **Response to Community Needs:** Preference will be given to organizations working to support systems and services that address the needs of individuals and families in the San Francisco Bay Area communities of Belle Haven, East Palo Alto, North Fair Oaks, and Redwood City.
- **Community Engagement:** Preference will be given to organizations that (1) intentionally and authentically engage with the communities they serve in the development of their strategies and solutions, and (2) demonstrate a long-term commitment and connection to the communities they serve.
- **Intended Impact(s):** Preference will be given to organizations that (1) demonstrate a clear understanding of the problem(s) they are trying to solve; (2) clearly outline their approach to solving the problem(s); (3) define what short-, medium- and long-term success looks like; and (4) identify potential challenges and pitfalls.
- **Organization/Project Leadership and Staff:** Preference will be given to organizations whose leadership and staff (1) have deep experience in the communities of Belle Haven, East Palo Alto, North Fair Oaks, and/or Redwood City; and (2) reflect the rich diversity and stories of the communities they serve.
- **Collaboration:** Preference will be given to organizations that demonstrate a collaborative spirit through (1) an awareness of available overlapping and complementary efforts and services; (2) a desire to partner to increase impact, where appropriate; and (3) an understanding of local community context and the desire and ability to leverage existing community relationships and/or build new ones.
- **Fiscal Responsibility and Sustainability:** Preference will be given to organizations that can effectively receive and responsibly spend grant dollars, as demonstrated by (1) a clear budget narrative that articulates how grant dollars will be used, as well as a plan for financial sustainability beyond the CZI Community Fund grant cycle, and (2) documentation.

Fund Eligibility

Organizations interested in funding through the CZI Community Fund must meet the following criteria:

- **Tax status:** Organizations must be tax-exempt under section 501(c)(3) of the Internal Revenue Code; have a valid fiscal agent or sponsor that is tax-exempt under section 501(c)(3) of the Internal Revenue Code; or be a local municipality or government agency. Valid documentation must be submitted with your proposal by the proposal deadline, Thursday, September 12, 2019, at 4 pm PT.
- **Organization Budget:** Organizations or fiscally sponsored projects must have an operational budget of at least \$100,000. Given the short-term nature of the CZI Community Fund grants, CZI will not fund more than 25% of your full organization budget.
- **Availability for a Face-to-Face Meeting:** Organizations that move beyond the internal review process must be willing and available to participate in a site visit or video conference meeting with CZI staff November 1-15.
- **Chan Zuckerberg Initiative Grantee Status:** Organizations and sponsored projects with General Support grants from the Chan Zuckerberg Initiative that end on or before December 31, 2019, are eligible to apply for funding from the 2020 CZI Community Fund. Organizations with grants from the Chan Zuckerberg Initiative that extend beyond December 31, 2019, are not eligible to apply for funding from the 2020 CZI Community Fund.
- **Local School Districts:** CZI supports our local school districts in various ways, however, does not support them through the CZI Community Fund. Please reach out to community@chanzuckerberg.com if you have questions.

Contact information

Organization Name*

IRS Tax ID Number (EIN)

Physical Address*

Mailing Address (if different than physical address)

Organization Website (if available)

Primary Contact

(the person responsible for all communication related to the grant application)

Salutation

First Name*

Last Name*

Title*

Phone*

Email Address (*if applicable*)

Executive Director/President/CEO Contact

(The most senior staff member in your organization)

Salutation

First Name*

Last Name*

Title*

Phone*

Email Address (*if applicable*)

Fiscal Sponsor/Fiscal Agent Information (if applicable)

Fiscal Sponsor Name *

IRS Tax ID Number (EIN)

Physical Address*

Mailing Address (if different than physical address)

Organization Website (if available)

Primary Fiscal Sponsor Contact Information

(the person responsible for the sponsored project at the Fiscal Sponsor organization)

Salutation

First Name*

Last Name*

Title*

Phone*

Email Address (*if applicable*)

Communities Served

Which community (ies) do you serve? (Select all that apply)

Belle Haven
East Palo Alto
North Fair Oaks
Redwood City

Issue Areas

Please select your primary and secondary focus areas from the lists below. Please note that while we *may* consider supporting work outside the seven focus areas identified by the communities, preference will be given to applications aiming to address issues that fall within them.

Primary Focus Area (Choose One)*

- Education
- Food Security
- Homelessness
- Housing
- Immigration
- Mental Health/Health Care
- Safety/Security
- Transportation
- Workforce Development
- Other, please specify

Secondary Focus Area (Choose one, if applicable)

- Education
- Food Security
- Homelessness
- Housing
- Immigration
- Mental Health/Health Care
- Safety/Security
- Transportation
- Workforce Development
- Other, please specify

Section 1: Organization and/or Project Mission and Vision* (Note: If your organization receives a grant, a version of this information will appear on ChanZuckerberg.com. Please start the mission statement with your organization name followed by what it does, for example: *The San Francisco YMCA builds strong kids, strong families, and strong communities by enriching the lives of all people in spirit, mind, and body.*)

[600 Character Limit]

Section 2: Overview and Purpose*

Please provide an overview of the work of your organization and your request for support. **Consider the following questions:** How long has your organization worked in this community(ies)? What major challenge(s) is your organization trying to address? How is your organization helping build stronger communities and promoting self-sufficiency for all individuals and families? How will a grant from the CZI Community Fund help you advance your work?

[1800 Character Limit]

Section 3: Leadership and Staff*

Please tell us more about your leadership team. Consider these questions: How are members of your leadership team uniquely positioned (e.g. given their backgrounds, experiences, etc.) to advance your organization's mission? How is your staff and leadership team reflective of the community your organization serves?

[1200 Character Limit]

Section 4: Community Engagement*

What is the social makeup of the community your organization serves? (race/ethnicity, social and economic status, location, etc.) How is your program intentionally designed to accommodate that makeup? How, if at all, do you regularly and consistently engage your community so that your program can be continuously improved and adapted to meet its needs?

[1900 Character Limit]

Section 5: Collaboration*

Who are some of your core partners and allies (non-profits, government agencies, businesses, etc.) in your work? Where appropriate, what are your plans to engage with other organizations and/or community assets to effectively support and enhance the lives of individuals and families you serve?

[1700 character limit]

Section 6: Potential Impact of Funding*

(For general support grants, successes should show impact to the broader organization or community served. For project grants, please talk about specific project impacts.)

Please describe what success might look like in the short (2-6 months), medium (7-12 months), and long-term (beyond the grant). What are 2-4 indicators that you would use to assess your progress? What potential developments or challenges—internal or external—could make harder for your organization to be successful?

[1800 Character Limit]

Section 7: Fiscal Responsibility and Sustainability*

*Note that In almost all cases, CZI Community Fund grants will be unrestricted, general operating support grants. Given the short-term nature of the CZI Community Fund grants, CZI will not fund more than **25% of your full organization budget.***

*Please enter your organization's or fiscal agent/sponsor's total annual operating budget for **your organization's** current fiscal year. [30 Characters]

If you are requesting project support, please enter the total project budget here: [30 Characters]

We place great value on an organization that has strong fiscal management and sustainability as is evidenced by adequate working capital, diversified funding sources, adequate financial reporting, clear strategies for income generation,

and roadmap for future direction. How would you describe your financial health and sustainability? Provide details on your strategy to sustain or improve both.

[1000 character limit]

Fiscal Responsibility and Sustainability

Please include the following documents

- A full list of your organization's current **Board Members**. This list should include first and last names for each board member, their professional affiliation(s), their board position(s), and years of service. Please include details about how frequently your board meets.
- A **Financial Summary** for **your organization's current fiscal year**. This summary should consist of income, expenses, and the names of your top three funding sources.
- A **Balance Sheet Summary** for **your organization's current fiscal year**. This summary should include details about assets and liabilities from your most current fiscal year and the prior year close.

We do not require a specific format for these documents. If you need a template, please contact us directly at community@chanzuckerberg.com. Please include "***Budget Templates Request***" in the subject line.