

Richmond 2017 Chorus Foundation Project Application Instructions

Introduction

On behalf of the Chorus Foundation (the Foundation), Mott Philanthropic is accepting applications for project funding that support the Our Power Campaign in Richmond to achieve a just transition away from fossil fuels and the extractive economy that puts money and profits before community needs, health, and safety.

Prior to submitting an application, please review the [Foundation's website](#) and the [Richmond Request for Proposals webpage](#).

Below is information about the Foundation, the review process, and funding requirements. We recommend reviewing and collecting all the necessary information described below to complete the online application before beginning. Your final proposal must be submitted online. We also ask that you track the total amount of time it takes you to complete this application

Foundation Mission and Values

The Chorus Foundation works for a just transition to a regenerative economy in the United States. The Foundation supports communities on the front lines of the old, extractive economy to build new bases of political, economic, and cultural power for systemic change.

We envision an economy in which everyone can find meaningful work; an environment in which everyone has access to clean air, clean water, and a stable climate; and a democracy in which everyone has a say.

For this request for proposals, one-year grants of \$10,000-\$50,000 are available to advance the following priorities:

- Base Building/Leadership Development Work. Leadership development around just transition to answer the question: how do we engage Richmond residents in just transition?
- Building the New. New ways of looking at certain system (such as food, energy, water, waste, transit, health, and housing) to reflect just transition and provide the foundation for alternative models.
- Democratic Governance. Participatory budgeting, community planning, creating electoral infrastructure, and civic engagement that prioritizes communities of color and working families.
- Change the Story. Narrative and messaging materials, media campaign around just transition, and dissemination and amplification of that narrative.

Activities must take place in Richmond, California.

Funding Requirements

All organizations will be required to submit a final report within one month after the end of the grant.

For all reports, your organization is required to complete both a narrative email that will be distributed to all other Chorus Foundation grantees and an online report submitted through this grant system.

In addition to these reports, site visits with Foundation trustees and Mott Philanthropic staff may also be requested. If the Foundation is funding an event, such as a meeting or conference, please ensure that [Cuong Hoang](#) is aware of the event dates, should a representative of the Foundation wish to attend.

Questions and Additional Information

- If you have any questions about the content of your proposal, please contact [Cuong Hoang](#).
- If you have any questions regarding this online application process, please contact Mott Philanthropic's Grants Manager [Paula Lentoni](#).
- You *do not* need to send a hard copy of this application via postal mail.
- **Proposals are due by March 1, 2017.**
- **Grant decisions will be announced by April 3, 2017.**

Suggestions for a Successful Application Submission

- The software developers recommend that you avoid using Google Chrome to complete your online application.
- To return to your in-progress application at a later time and to avoid creating another application form, please use the link to the [Grantee Center Login](#) (not the application link) to access your organization's main online account.
- Complete the Goals, Objectives, Projected Outcomes, and Evaluation Methods sections of the application in a Word document and then copy/paste them into the application form.
- If you leave out required application information, the system will not allow you to submit without completing the missing section(s). You must then select "Update" and then "Submit" to finish the submission process.
- Confirm application submission by looking on your login page for a "Thank You" notification at the top of the page and/or a listing of the completed application in the "Submitted Application" section at the bottom of the page.

Instructions

This document is a PDF version of the online application for your review prior to submitting responses online.

All materials and the following questions must be answered and submitted through the online portal using the links below:

[Online Application Link](#) Use this link to create an account and start your application.

[Grantee Center Login](#) Use this link to return to your organization's main online account and previously started applications.

Below is a list of required documents necessary to complete your submission. Please refer to the table on the "Attachments" page in the online portal for required file formats and uploading instructions.

Please be advised that, in addition to the attachments, you will need to complete a few questions about your organization and funding request within the online application

Attachments

1. Narrative:

Please upload a narrative as a Word or PDF document.

Project Description

- Describe the rationale or need for the project and how the project connects to the Our Power Campaign Framework.
- Provide an overview of the project goals and objectives (more details about goals and objectives are requested later in this application) and details about the strategies to achieve these goals and objectives.
- Describe the population served and the community need that will be addressed.

Please note: *The Foundation cannot support the lobbying expenses of any project or of any organization that is utilizing a fiscal sponsor. Our definition of lobbying conforms with the [IRS definition](#).*

If you have a question about whether your proposed project includes lobbying, please follow up with [Cuong Hoang](#).

2. Project Budget and Narrative:

Please submit a project budget that includes both expenses and revenues. Personnel expenses should describe each position funded and the full-time equivalent (FTE) allocated to the project. Revenues should describe secured and anticipated sources as well as any prospects; revenues should name specific foundations from which funding is secured and sought. A budget narrative that provides a more detailed

description of budget lines should accompany the budget. This information may be uploaded together or individually.

Please note, the Foundation cannot support any lobbying expenses.

For your convenience, this application includes a Financial Proposal Template that you may use to capture your project budget. However, the template is not required, and you may use a format of your own choosing as long as it captures the information requested above.

*Please click on the **Financial Proposal Template** link at the top of the screen to download this form. Instructions for completing the template are included at the beginning of the form. After you have filled it out, please save it in Excel format and upload it as an attachment. Please ensure that the figures entered on the Financial Proposal Template correspond with Budget Information in your application.*

3. Most Recently Completed 990:

Please upload the organization's (or fiscal sponsor's) most recently completed 990.

4. Audited Financial Statement, CPA Review, or Alternative Financial Documents:

Please provide the following from your organization or fiscal sponsor:

- A.** Most recently completed Audited Financial Statement, OR
- B.** Most recently completed CPA Review, OR
- C.** Statement of Financial Position AND Statement of Financial Activities (defined below)
 - Statement of Financial Position (aka Balance Sheet) for your most recently ended fiscal year: *The Statement of Financial Position, also known as a Balance Sheet, shows what the organization owns - its assets; what the organization owes - its liabilities; and the difference between its assets and liabilities - its net assets or net worth.*
 - Statement of Financial Activities (aka P&L Statement) for your most recently ended fiscal year: *The Statement of Financial Activities serves the same role as a profit-and-loss statement. This statement categorizes all income and expenses, showing net surplus or net deficit. Please include a corresponding column for the organization's budget for the most recently-ended fiscal year.*

*Please note: To be eligible for funding, **all grantees receiving \$50,000 or more in cumulative funding** from the Chorus Foundation in any one calendar year will be required to submit an Audited Financial Statement or CPA review if:*

- A.** *The grantee's annual revenues are between \$250,000 and \$499,999, in which case either a CPA Review or Audited Financial Statement is required);* **OR**
- B.** *The grantee's annual revenues are above \$500,000, in which case an Audited Financial Statement is required.*

If upon award the grantee does not have the applicable CPA Review or Audited Financial Statement, this will be required by the end of the grant term.

5. Grantee Photographs:

Please upload at least two and up to five photographs (JPEG or PNG) demonstrating your organization's work in action. These photos should be at least 500 to 700 pixels wide. One of the photos will be uploaded by Foundation staff to your organization's grantee page on the Chorus Foundation [website](#).

Please include any applicable credit(s) for the photographs.

By checking here, I confirm that my organization holds the rights to these photographs and that I understand that by uploading them as part of this application, I am giving the Chorus Foundation permission to use them on its website.

Additional Attachments

If available or applicable please upload the following:

- **Fiscal Sponsor Agreement:**

If your organization is working through a fiscal sponsor, please upload a fiscal sponsor agreement.

Please note that **after beginning the process, you will not be able to change your fiscal sponsor**. If your fiscal sponsor changes, the process will start over from the beginning. If using a fiscal sponsor, please provide their most recently completed 990 and their financial documents (attachments #3 and #4).

- **Strategic Plan:**

If your organization has a current strategic plan, please upload it as a Word or PDF attachment.

- **Job Description:**

If part of your funding request involves hiring new staff, please attach a draft job description.

- **Memorandum of Understanding:**

If a formal partnership or collaboration is part of your funding request, please submit a letter of support or "Memorandum of Understanding" from your partner(s).

Grant Application

1. Basic Information

Some of the information in this application may pre-populate from a previous grant application if you are a returning applicant. Please review and update, if necessary.

Tax Identification Number

Are you using a Fiscal Sponsor?

If your organization/project is not a 501(c)(3) tax exempt non-profit organization, but is being sponsored by a 501(c)(3) tax exempt non-profit organization, please select "Yes." Please upload a signed agreement between your organization and the fiscal sponsor under the "Attachments" page.

*Please note that **after beginning the process, you will not be able to change your fiscal sponsor.** If your fiscal sponsor changes, the process will start over from the beginning.*

Fiscal Sponsor Information

*If you answered "Yes" to the question above, please enter the fiscal sponsor's legal name, postal address, telephone number, name of contact, job title, and e-mail address. **If the grant is awarded, this is where all documents and checks will be (e)mailed.***

Legal Name Fiscal Sponsor or Organization

As it appears on the 501(c)(3) determination letter.

Organization's Name

Please enter your organization's name (if different from its Legal Name).

Organization's Acronym

Please enter any acronym or abbreviation used for your organization.

Organization's Mailing Address

Please do not use abbreviations.

City

State

Zip Code

Web Address

(ex. www.myorganization.org)

Year Organization was Founded

Please indicate if your organization has an Audited Financial Statement, CPA Review, or neither of these statements.

2. Name and Title of Organization's Director

Title

First Name

Last Name

Suffix

Professional Title (ex. President)

E-mail Address

Office Phone

Enter numbers with dashes (ex. 555-222-1111).

Ext.

3. Name and Title of Main Contact for Proposal

Same as Organization Primary Contact

Please check here if the main contact is the same as the organization's primary contact.

Title

First Name

Last Name

Suffix

Professional Title (ex. President)

E-mail Address

Office Phone

Enter numbers with dashes (ex. 555-222-1111).

Ext.

4. Additional Staff Contact

(Optional) Secondary staff member responsible for this proposal.

Title

First Name

Last Name

Suffix

Professional Title (ex. President)

E-mail Address

Office Phone

Enter numbers with dashes (ex. 555-222-1111).

Ext.

5. Organization Mission, Principles and Communities

Has your organization's mission changed in the last 12 months?

Mission

250 words or less.

If you have previously responded to this prompt in a prior application, you will find your response listed below. Please review and make any necessary changes.

Has your organization officially adopted or endorsed the Jemez Principles for Democratic Organizing?

If you answered "Yes", please explain when and why your organization adopted or endorsed the Jemez Principles and how the principles are integrated into your organization.

If you answered "No", please explain why not, and share how your organization integrates these principles and involves community members in its work and decision making, even though you may not have formally adopted or endorsed the principles.

6. Leadership, Staff, and Volunteers

Is your organization's executive director a person of color?

Does your executive director identify as Hispanic or Latino?

What is your executive director's race?

Please characterize your organization's staff by the following qualities.

Total Number of Full-Time Staff

If you have no full-time staff, please enter 0.

Total Number of Part-Time Staff

If you have no part-time staff, please enter 0.

Total Number of Volunteers

If you have no volunteers, please enter 0.

7. Board of Directors

The Chorus Foundation would like to learn more about your organization's board of directors.

Please characterize your organization's board by the following qualities.

Total Number of Board Members

If you have no board members, please enter 0.

Board of Directors List

Please provide a list of your organization's board of directors, along with their professional affiliation, city of residence, year of joining the board, and officer position (e.g., president, vice-president, treasurer, secretary, etc.), if applicable. Please click on the "i" for an example.

If you previously responded to this prompt in a prior application, you will find your response listed below. Please review and make any necessary changes.

8. People Served by Organization

Are at least 50% of the people your organization serves people of color?

What is the background of the population your organization serves?

You may include race, ethnicity, income, education, geographic location, LGBTQ, or any additional defining characteristics of the population that you think are important to note.

9. Organization's Evaluation

Organization's Evaluation

Please describe how your organization evaluates its work.

If you have previously responded to this prompt in a prior application, you will find your response listed below. Please review and make any necessary changes.

10. Organization's Budget Information

Please use actuals for past fiscal years' budgets.

*If you are using a fiscal sponsor, these figures should be from **your organization**, not the fiscal sponsor.*

Fiscal Year End Date

Organization's Budget for Fiscal Year 2016

Organization's Budget for Fiscal Year 2017

Organization's Budget for Fiscal Year 2018

Organization's Top 5 Funders

Please list the names and contributions of the organization's top 5 funders for the most recently completed fiscal year. (ex. 1. ABC Foundation, \$55,000)

Project Overview

1. Project Information

Project Title

Project Description

Please give a brief description of your proposed project (up to 500 words).

New or Existing Grant Request

If this request is related to ongoing support, please enter the current grant award number.

Ex. Ongoing Support for Award #1234, XYZ Project

Target Population for Project

Please be specific (ex. geographic, demographic, or psychographic aspects).

Length of Grant

Grant Start Date

Grant End Date

Please note: A final report will be due within one month after the end of the grant term.

2. Budget Information

The budget figure in this section **must match** the figures on your Project Budget attachment.

Last Year's (FY16) Project Budget

Project Budget for FY17

Grant Request Amount

Additional Funding Sources

If seeking project funding from other sources, please identify each source with the request amount and the status of that request (prospect, requested, confirmed).

Key Staff Members

Please provide information on key staff members related to this project and briefly describe their qualifications. We recommend that each biography include the person's current title and a brief description of responsibilities; when he or she began working at your organization and the length of time in the current position; any relevant work experience, recognition, or awards; and educational background.

Project Goals, Objectives, and Projected Outcomes

Please list the goal(s), objective(s), projected outcome(s), and evaluation method(s) for the grant period.

A minimum of one and maximum of five goals will be accepted.

Objectives are defined as the efforts and actions taken to achieve the stated goal. Please be as specific as possible.

For each **projected outcome** please describe:

- final indicator(s) you expect at the completion of the grant period; and
- other indicators you are seeking beyond the grant period.

Please describe the **evaluation method(s)** used to determine the success of the goal(s).

Goal One

Objective(s) for Goal One

Projected Outcome(s) for Goal One

Evaluation Method(s) for Goal One

Goal Two

Objective(s) for Goal Two

Projected Outcome(s) for Goal Two

Evaluation Method(s) for Goal Two

Goal Three

Objective(s) for Goal Three

Projected Outcome(s) for Goal Three

Evaluation Method(s) for Goal Three

Goal Four

Objective(s) for Goal Four

Projected Outcome(s) for Goal Four

Evaluation Method(s) for Goal Four

Goal Five

Objective(s) for Goal Five

Projected Outcome(s) for Goal Five

Evaluation Method(s) for Goal Five

In our continued efforts to streamline our application process, please respond to the questions below.

How long did it take you to complete this application?

Feedback

If you would like to provide any feedback regarding the application please use the space below.