2017 GRANTS TO GREEN – IMPLEMENTATION
INSTRUCTIONS FOR COMPLETING THE GRANT APPLICATION SUPPLEMENT

This Supplement requires you to complete and attach an Implementation Chart. Implementation Charts are completed using Google Documents. You must request a link to your personalized Implementation Chart before completing this form by emailing grantstogreen@cfgreateratlanta.org and entering "Request for Implementation Chart – Org Name" in the subject line.

The Community Foundation for Greater Atlanta's Grants to Green program provides funding to implement recommendations from an energy/water Assessment to encourage and help nonprofits to build and operate green. In the application process, applicants will complete: an Organizational Profile, a Common Grant Application and a Grant Application Supplement with required attachments. All completed materials must be submitted by **NOON on Friday, February 10, 2017**. Grants to Green staff, partners and Advisory Committee members will review each submitted application and invite selected organizations to participate in a site visit and/or interview. Implementation Grants will be made based upon evaluation of applications and site visits/interviews.

Grants to Green publishes Guidelines to help applicants understand the priorities and criteria of the grant program. Make sure you have reviewed the current Guidelines for Grants to Green on our website (cfgreateratlanta.org).

<u>**Completing the Application**</u>
- **Saving the Form:** Before beginning to fill out the form, be sure to download and save the form to your computer. As Grants to Green will be receiving many applications, please include your organization's name in the file name and in the subject line of your email. (ex. "ABC Center – Grants to Green Implementation Application")
- **Navigating the Form:** With your mouse, left click the grey boxes to activate the dropdown menus or to type in or paste in your answers. Use the Tab key or your mouse to go to the next box or section.
- **Format Rules:** Allow the text to wrap automatically within the box. Do not use the Enter key to change lines or use bullets in text boxes. Do not recreate or alter the application form.
- **Character Counts:** All character counts include spaces as characters.
- **Un-answered fields:** Any field left blank will automatically exclude the application from consideration (it is incomplete and therefore ineligible).

<u>**General Information**</u>
- **Is the organization a previous Grants to Green applicant?** Using the dropdown menu, select which, if any, Grants to Green Implementation awards and/or Implementation grants your organization has previously received.
- **Funding Request Amount:** Enter the amount of funding your organization is requesting from Grants to Green. This information will come from completing your organization's Implementation Chart using the required contractor bids for each project. See in **red** above for instructions to request a link to your organization's personalized Implementation Chart.
- **This is a matching grant. Please discuss how the match from your organization will be fulfilled.** Being able to provide matching funds is an eligibility requirement for Grants to Green. Discuss how the match from your organization will be fulfilled. Be as specific as possible.

- **Does the organization provide religious services and/or education?** Using the dropdown menu, indicate whether or not (Yes/No) the organization provides religious services and/or education.
- **If the organization is a religious organization, does the organization require participation in religious activity as a condition for receiving services?** Using the dropdown menu, indicate whether or not (Yes/No) the organization requires religious participation as a condition for receiving services. The applicant must be able to answer No in order to be eligible. Only choose "Not Applicable" if the answer to the previous question was "No".
- **If the organization is a religious organization, are the spaces and systems in the buildings in request building dedicated to serving secular needs?** Indicate whether or not (Yes/No) the spaces and systems in the building in the request are dedicated to secular needs. The applicant must be able to answer "Yes" in order to be eligible. Only choose "Not Applicable" if the answer to question 2 was "No".

5. Assessment Information
- **Was the Assessment received through Grants to Green?** Select Yes/No from the dropdown menu to indicate whether or not this Assessment was received through the Grants to Green program.
- **Assessment Completed By, Address, Phone and Email**: Enter the name, title, company and contact information of the person and/or organization that completed the organization's Assessment(s). If Assessments were performed by multiple contracts please enter this information in the composition section of the applicant's submission email.
- **Completion Date**: Enter the month, day and year when the Assessment(s) were completed and not the completion date of the Assessment Report. If Assessments were performed on multiple dates please enter this information in the composition section of the applicant's submission email.
- **Has Southface presented the results of your Assessment to your board of directors or relevant subcommittee? If so, when did the presentation take place?** Indicate whether or not Southface has presented the results to your board and when. Please note that this presentation must take place before submission of your application materials (see the Grants to Green guidelines for more information).
- **What were the outcomes of the presentation?** Describe the Board (or subcommittee's) reactions and/or concerns to the presentation. What were the major takeaways?

6. Building Details
- **Building Address, City, Zip Code and County:** Enter the address, city, zip code and county (using the dropdown menu) of _the building_ your organization is requesting Implementation funding for. If your organization has multiple buildings, please be sure to only include the address of the building your organization is requesting Implementation funding for. Buildings must be located in the Community Foundation's 23-county service area to be eligible to receive funding.
- **Building Name (if applicable):** If the building in the request has a distinguishing name (ex: Building B, the Administrative Building, the Gym, etc.) indicate that here. If not, write "N/A".
- **Square Footage:** Enter the numerical square footage of the building in the request.
- **Year Constructed:** Enter the year the building in the request was constructed.
- **Type of Facility:** Select using the dropdown menu the primary function of the facility (housing, classroom, office, parking, etc.)

7. Building Information
- **How many buildings does the organization own?** Enter in the number of buildings the organization can prove ownership of.
- **How many buildings does the organization lease?** Enter in the number of buildings the organization leases.
- **Building in the request is:** Using the dropdown menu, indicate whether the building you are requesting Implementation funding for is: Leased or Owned.
- **If leased, is the lease agreement five years or more with five years remaining?** Using the dropdown menu, indicate whether or not (Yes/No) the building that is leased has a lease agreement

with a five-year term or more with at least five years remaining. The applicant organization must be able to answer "Yes" in order to be eligible, if the building is leased. If the request is for a building that is owned, select "Not Applicable".

- **Is the building in the request owned by a government agency?** Using the dropdown menu, indicate whether or not (Yes/No) the building in the request is owned by a government agency. This question does not affect eligibility and is for informational purposes.
- **Does the organization have 12 months of utility data for the existing building it is requesting support for?** Using the dropdown menu, select Yes, No or Not Applicable to indicate if the organization has utility data for an existing building. If the request is for new construction, select "Not Applicable." Applicants must be able to provide 12 months of utility data for the existing building it is requesting support for.
- **Building in request: Most recent, consecutive 12 months total utility usage**: Enter the most recent, consecutive 12 months of utility usage for electricity (kWh), water (gallons) and gas (terms).
- **Building in request: Most recent, consecutive 12 months total utility costs:** Enter the total cost of utilities for the building in request based on the building's most recent, consecutive 12 months of utility bills.
- **For the building that has been assessed, do you have control over the entire building's electricity and water use systems?** Using the dropdown menu, indicate whether or not (Yes/No) the building in the request has control over the entire building's electricity and water use systems. To receive an assessment, the organization must have evidence of utilities paid including the organization's name on the utility bill. To request an Implementation grant, the organization can only apply for those items for which it owns and directly pays the utilities. *For example, if you do not control or pay for water directly, then you cannot request Implementation funding for water related projects.*
- **For the building that has been assessed, is the metering configured such that the consumption of utilities can be monitored and tracked by building?** Using the dropdown menu, indicate whether or not (Yes/No) the building in the request has metering configured such that it can tracked and monitored by building. This is required for Grants to Green reporting requirements.

8. Rental/Ownership

Check only those boxes that apply to your organization and the building in request, and fill in appropriate information where necessary.

- **If applicable, does the Board have a plan for eliminating the debt?** If you checked box "B - Owned by the organization with a debt of $XXX with (#) years remaining on the loan" use the dropdown menu to indicate whether or not your organization's Board has a plan for eliminating the debt. If your organization owes no debt on the building in request, select "Not Applicable".
- **Please explain:** If you selected "Yes" to the previous questions, use this space to explain your Board's plan for eliminating the debt. If you selected "No" or "Not Applicable", write "N/A".

9. Tenants

- **Tenants of a larger building: Does the organization lease or own the entire building in the request?** Indicate whether or not (Yes/No) the organization leases or owns the entire building. Please refer to the Grants to Green Guidelines for the Tenant Space policy.
- **Lease space to other tenants: Does the organization lease space to tenants in the building in the request?** Indicate whether or not (Yes/No) the organization leases space to tenants. Please refer to the Grants to Green Guidelines for the Tenant Space policy.

10. Other Details

- **Explain the organization's most recent experience with building improvements.** Explain any recent experience with capital and/or building improvement projects. Include responses to the following: What was the general scope of work? Was the project completed on time? Was the project completed under, on or over budget?
- **Does the organization have a list of deferred maintenance items?** Explain if your organization has a list of deferred maintenance items. Deferred maintenance is the practice of

postponing maintenance activities such as repairs on both real property (i.e. infrastructure) and personal property (i.e. machinery) in order to save costs, meet budget funding levels, or realign available budget monies.

- **Explain the organization's plan for implementing recommendations within a 12-month time period. If the implementation is expected to be significantly shorter or take longer than 12 months, please explain.** Use this space to explain the timeline for completing all implementation projects listed in the Implementation Chart.
- **Describe the capacity at which the organization's Board will be involved in the process.** This question provides the opportunity to explain how the organization will utilize the expertise of its board during the Implementation process if an Implementation grant is awarded.
- **Use this space to clarify any of the information provided in this grant application supplement.** Use this space to provide clarifications on any of the information provided in the Grant Application Supplement.

Authorizing Signatures

- Prior to completing this section, review the 2017 Grants to Green guidelines which describe how the Foundation does business through Grants to Green, addressing eligibility, submission deadlines, grant request amounts and other topics. Then type in the name of the Organization Leader and the Board Chair and enter the date the Grant Application Supplement was completed and submitted. Typing in the names of the Organization Leader and Board Chair acts as their signatures; electronic signatures (images of actual signatures) are not necessary. By typing in the names of the Organization Leader and the Board Chair, they authorize submission of the Grant Application Supplement and take responsibility for its content. The Foundation encourages all applicants to share all application materials and required attachments with its board and staff leaders prior to submission. You may find the Guidelines here: cfgreateratlanta.org.

Attachments Checklist

This section explains the preferred method for submitting each of the attachments. Each attachment must accompany your Grant Application Supplement in order for the application to be considered complete. Please note that all attachments must be submitted to the Foundation prior to the deadline in order for your application to be considered complete. **Incomplete applications will be declined and will not be reviewed.** Submit the completed Grant Application Supplement and all attachments by email to grantstogreen@cfgreateratlanta.org. As Grants to Green will be receiving many applications, please include your organization's name in the file name and in the subject line of your email. (ex. "ABC Center – Grants to Green Implementation Application").

The following should be attached as separate documents and sent via email to the Foundation with your application; **be sure to label all attachments using the letters provided so that Foundation staff can easily match the document to the required attachment**. **If the organization has been granted a Grants to Green Assessment conducted by Southface, <u>only</u> attach:**

A. **Current fiscal year operating budget as approved by the board of directors with year-to-date actual information:** Be sure the document includes the entire FY budget (revenue and expenses) and YTD information.
B. **Two most recent audited or reviewed financial statements as dictated by budget size.** Submit one copy of each of the two most recent audited or reviewed financial statements. Organizations with annual budgets *over $250,000* must present audited financial statements; organizations with annual budgets *between $100,000 and $249,999* must present reviewed or audited financial statements.
C. **The organization's current strategic plan** (send the Foundation the entire plan) that covers at least 24 months and the organization's entire current fiscal year and includes the following:
   a. Mission statement
   b. Evidence of an environmental scan (an assessment of stakeholder and community needs)
   c. Stakeholder participation (staff, board, consumers/clients, volunteers, etc.)
   d. Strategic goals and measureable objectives

> e. Implementation plan showing action steps, a timeline and assigned staff and board responsibilities
>
> f. Quarterly, semi-annual or annual written assessment by staff and board to measure organizational progress towards goals

D. Completed Board Information Form: Download the form from the Community Foundation website (cfgreateratlanta.org) and complete the document.

E. Completed Green Champion Information Form: Download the form from the Community Foundation website (cfgreateratlanta.org) and complete the document. Please review the Green Champion Volunteer Description before selecting a Green Champion.

F. A copy of the completed Assessment (for existing buildings) conducted by Southface or Design Review (for new construction).

G. Copies of contractor bids (two bids required)

H. Signed and dated deed proving building ownership or **lease agreement** proving long-term lease of at least 5 years or more at the time of submitting the application.

I. Completed Implementation Chart: This form will be completed via Google Documents. To receive your personalized link, please email grantstogreen@cfgreateratlanta.org.

For all other applicants with Assessments performed by entities other than Southface, include the following attachments <u>in addition to</u> the above attachments:

H. A copy of the completed Assessment (for existing buildings) or Design Review (for new construction)

I. Letter from the Board of Directors signed by the organization's Board Chair that includes a statement agreeing to allow Southface or the other entity that performed the assessment to present an executive summary of the findings of services to the Board or a relevant Board subcommittee as a 20- minute agenda item during one of its regular meetings.

Instructions for Completing the Implementation Chart

This Grant Application Supplement requires you to complete and attach an Implementation Chart. Implementation Charts are completed using Google Documents. **You must request a link to your personalized Implementation Chart** before completing this form by emailing grantstogreen@cfgreateratlanta.org.org and entering "Request for Implementation Chart – Org Name" in the subject line.

You will need to refer frequently to your Assessment Report for requested information. The document consists of three tabs – the Implementation Summary, and detailed charts for Existing Buildings. The document fields are color-coded for your data entry. You will find detailed instructions throughout the document in italics and in numerous note boxes. The instructions below are supplementary to those found in the document itself. If you have difficultly utilizing the functionality of the form, please email grantstogreen@cfgreateratlanta.org for assistance.

Implementation Summary – The first tab is the Implementation Summary. All Grants to Green Implementation applicants should complete the summary, which provides an overview of the project.
- **Basic organization information:** Enter the organization's basic information, including Implementation Project Type (Existing Building), organization name, property address, building name (if applicable), annual operating budget and the date the chart will be submitted.
- **Implementation Summary:** Describe the projects that the organization would like to implement based on the recommendations in the Assessment Report. List the recommendation number, a short description of the desired project, the contractor name whose bid is being used for the pricing listed in the document, and a short description of the project details. Be sure that the recommendation numbers correspond to those listed in the Assessment Report.
- **Match Source and Match Status:** For each recommendation listed identify the source of organizational funding that will match Grants to Green funds. Please see the Grants to Green Guidelines for acceptable match sources. For each match source indicate if the match is Available, Pending or Unknown, using the dropdown selections.

- **Utility Impact table:** Enter the requested information from the Assessment Report in the tan fields for Annual Utility Consumption. The gray fields for the Annual Energy and Annual Water usage will automatically populate.

Existing Building – Details - Complete this tab only if your organization is applying for an Existing Building.
- **Recommendation name:** This field will automatically populate from the Implementation Summary.
- **Estimated Cost from Report:** This information can be found in the Assessment Report.
- **Cost from Contractor Bid:** Enter the total estimated cost for implementation according to the contractor the organization identified in the Implementation Summary. This amount includes costs such as labor, delivery, etc. (beyond the price of purchasing an item). **The organization must submit at least two copies of contractor bids in order for the estimates to be considered, but will select one bid for the purposes of this document.** Entering N/A will disqualify the organization.
- **Request Amount:** For each recommendation listed; enter the amount the organization would like for Grants to Green to contribute for implementation.
- **Match Amount:** For each recommendation listed; enter the amount the organization would contribute for implementation. Depending on the organization's budget the match <u>rate</u> is:
    - $0.50 to a $1: for organizations with an organizational budget between$100,000-$499,999
    - <u>or</u>
    - $1 to a $1: for organizations with an organizational budget equal to or more than $500,000
    - Note: Each recommendation does not have to have a match associated with it, what is most important is that the Total match amount is correct.
- **Projected Electricity, Natural Gas and Water Savings:** For each recommendation listed enter the projected annual energy or water savings in kilowatt hours, gallons or therms. This information is provided in the Assessment Report. There is a dropdown field for each of the Units.
- **Projected Annual Cost Savings:** For each recommendation listed enter the projected annual cost savings. This information is provided in the Assessment Report.
- **Simple Payback (Years):** This field will automatically populate.

Submitting an application to Grants to Green

- **Current Form:** Applicants must use the "2017 Grants to Green Implementation - Grant Application Supplement Form" provided on the Community Foundation for Greater Atlanta's website. The Foundation will only consider submissions that use the current form; old or outdated forms are not acceptable and will not be reviewed. Please check the year at the top of the application before completing and submitting the form.
- **Deadline:** The Foundation's deadlines are NOON on dates indicated in the Grants to Green Guidelines. Submissions received after the NOON on the deadline day will NOT be accepted for that cycle.
- **Filing Your Application:** The Foundation accepts submissions any time prior to the deadline. After submitting your Nonprofit Organizational Profile and Common Grant Application via the online application portal, email your Grant Application Supplement as a MS Word attachment to grantstogreen@cfgreateratlanta.org **no later than NOON** on the deadline day. Submissions received after NOON on the deadline day based on the Foundation's computer date and time will be automatically declined as late. No staff may extend the deadline. *Staff urges you to file your application several hours in advance of the deadline to avoid any computer-related problems that could arise when many applications are filed at one time.* Note the name of the applicant organization and the phrase "Grants to Green Implementation Application" in the subject line of the email.
- **Risk of Automatic Declination:** The Foundation will decline any application that does not meet the eligibility criteria. Incomplete applications (those with any blank fields) will be automatically declined; **every question and field must be completed**.

- **Acknowledgement of Receipt of Application:** If the application is filed within one week of the deadline, applicants will receive an automatic email notifying them that the Foundation has received their application within minutes of submission. If your organization does not receive the acknowledgement email, please contact our Grants Manager by calling (404) 688-5525. Applicants who file earlier will receive notification within 48 business hours.

Questions?

Prospective applicants are strongly encouraged to participate in the orientation session. Prospective applicants who are unable to join the live online session are encouraged to review the online orientation session presentation (PowerPoint and audio) posted on our website.

For further information, you may also contact Tyronda Minter, Director, by calling (404) 688-5525 or by emailing grantstogreen@cfgreateratlanta.org.