

# General Operating Support 2017 Guidelines



# Overview

## ABOUT THE COMMUNITY FOUNDATION FOR GREATER ATLANTA

Since 1951, the Community Foundation for Greater Atlanta has been connecting donors, nonprofits and community leaders to strengthen the 23-county Atlanta region through philanthropy. As a top 20 community foundation of 750 nationally, with approximately \$900 million in current assets, Georgia's second largest foundation exists to connect the passions of donors with the purposes nonprofits strive to improve. Through its quality services and innovative leadership on community issues, the Foundation received more than \$113 million from donors in 2015 (unaudited) and distributed more than \$139 million that same year to support nonprofits throughout the region and beyond. For more information, visit: [www.cfgreateratlanta.org](http://www.cfgreateratlanta.org) or connect with the Foundation via [Facebook](#) and [Twitter](#).

At the Community Foundation, we believe in the power and potential of individuals and organizations to change communities, whether those communities are physical neighborhoods, a group of individuals with a common interest or a cohort of organizations focused on similar issues. We play a variety of roles, but our key goal is to be the connecting point for the various partners, nonprofit organizations and community leaders working together toward the common vision of stronger greater Atlanta region.

## IMPACT AREAS

The Community Foundation for Greater Atlanta fulfills the passions of our donors by investing in our region through grantmaking, partnerships and advocacy. To create meaningful, lasting change, our efforts align via measurable objectives through focused "Impact Areas." We practice what we preach – evolving beyond grantmaking strategies and industry jargon to real, tangible impact.

**These five impact areas are our promise to the 23-county region - that in partnership with our donors, nonprofits and collaborators, we vow to make Atlanta a better place for all residents to live and thrive.**



**Arts**



**Community Development**



**Education**



**Nonprofit Effectiveness**



**Well-being**

**Arts** >> Build a dynamic arts ecology to ensure all residents in our region will have access to high-quality cultural experiences and diverse artistic programs

**Community Development** >> Advocate for equitable economic growth, strong civic health and safe, sustainable communities

**Education** >> Improve outcomes and expand opportunities for all learners across the education spectrum

**Nonprofit Effectiveness** >> Invest in the region's nonprofits with management and financial resources to equip these organizations to effectively manage operations and high-performing programs

**Well-being** >> Ensure a healthy, safe and engaged region, where all residents have access to quality health care and nutritious food

All of these impact areas are complex and multi-dimensional and require cross sector, regional collaboration: these are opportunities with solutions that cannot be achieved by any one entity. The Foundation has an extensive base of knowledge and relationships across the region, spanning diverse communities, populations and issues, making us uniquely poised to serve as a hub for impact.

### ABOUT GENERAL OPERATING SUPPORT

General Operating Support cash grants are available to support an organization's ongoing administrative and infrastructure costs and to maintain existing, effective programs. Characteristics of successful applicants include: a clear vision of the organization's role in making a difference in the community, a demonstration of effectiveness through the investment of time and personnel in measuring and planning for success and a written strategic plan that covers two or more years, includes goals and methods to measure effectiveness and is used to form an annual work plan. In 2017, support for general operating support grants comes from the Common Good Fund, the Metropolitan Atlanta Arts Fund, the Atlanta AIDS Fund, Spark Clayton! and Spark Morgan!.

**These grants are very competitive.** Grants will range from \$5,000 to \$75,000 for each 12-month period and may be awarded for 12 or 24 months; exceptions are noted on page 4. *Organizations can request no more than 10% of the organization's last completed fiscal year's expenses for each year funds are requested.* In mid- and end-of-grant reports, each grantee will be asked to reflect on how their organization's mission-related activities have advanced the Community Foundation's impact area metrics during the grant period and the results achieved within the grant period as outlined in their strategic plans. Additionally, the report will grantees to report on successes and challenges, both programmatically and in general.

The Foundation's General Operating Support grants are directly aligned with our goal of strengthening the region's nonprofits. Grant awards are made based on a number of factors including those outlined on page 8 of these guidelines. The Foundation seeks to continue to support strong, sustainable organizations. In addition, we are eager to support nonprofits that hold great promise.

#### What is General Operating Support?

General operating support provides unrestricted funding to help support and maintain an organization as it pursues its mission. This type of grant is flexible and gives the grantee the ability to use the funds where they are most appropriate.

### FUNDING PROVIDED BY:

#### COMMON GOOD FUND

While some donors set up their own donor-advised funds with us, other donors choose to support critical issues in the community by donating unrestricted dollars to our Common Good Fund. Donors who give to the Common Good Fund help us to meet the needs of our community today and for years to come.

This pool of unrestricted funds allows nonprofit organizations in our 23-county region to apply for grants through a competitive process. After a rigorous review process, and under the guidance of our Board of Directors, grants are made on the basis of community need and strength of the application proposals.

#### METROPOLITAN ATLANTA ARTS FUND

General Operating Support for the arts is provided by the Metropolitan Atlanta Arts Fund (Arts Fund) of the Community Foundation for Greater Atlanta. The Arts Fund was created to support independent small and medium-sized arts organizations located throughout the 23-county metropolitan Atlanta region. The Arts Fund provides resources to strengthen arts organizations with annual operating budgets under \$2 million.

Through its grantmaking, the Arts Fund responds to organizations that demonstrate artistic vibrancy and serious self-assessment, recognize the importance of evolving institutional planning and strong financial management for artistic and operational objectives, and illustrate a long-term commitment.

### **ATLANTA AIDS FUND**

The Atlanta AIDS Fund (AIDS Fund) mission is to support metropolitan Atlanta's HIV/AIDS advocacy, prevention, education and service efforts through funding and leadership. Since 1991, more than \$11 million in grants have been awarded to organizations in the metro area.

The AIDS Fund is a collaborative funding partnership between the Community Foundation for Greater Atlanta, United Way of Greater Atlanta, The Allen Thornell HIV Care and Service Fund and Fashion Cares. The AIDS Fund is committed to funding *throughout* the 23-county region.

The AIDS Fund is overseen by an advisory committee that makes recommendations regarding policies, programs and grants of the AIDS Fund. The Board of Directors for both the Community Foundation for Greater Atlanta and United Way of Greater Atlanta review these recommendations and make the final approval of grants. *HIV/AIDS service organizations may request grants ranging from \$10,000 to \$75,000 for a 12-month period.*

### **SPARK CLAYTON!**

Spark Clayton! – formerly the Clayton Fund – was established in 1992 to bring together donors, nonprofits and community members to encourage philanthropy in Clayton County. Spark Clayton offers grantmaking, as well as philanthropic learning opportunities and community awareness activities – all with the goal of building philanthropy and strengthening nonprofit organizations throughout Clayton County.

Since 2003, Spark Clayton! has granted more than \$250,000 to area nonprofits to respond to the changing needs of the community. Spark Clayton! has an Advisory Committee comprised of knowledgeable leaders who live and work in Clayton County who provide local perspective in this work. These local leaders are committed to developing local philanthropy and responding to the needs of their community.

### **SPARK MORGAN!**

The Morgan Fund of the Community Foundation for Greater Atlanta is now Spark Morgan! This fund was established in 2003 to bring together donors, nonprofits and community members to encourage philanthropy in Morgan County. Spark Morgan offers grantmaking, philanthropic learning opportunities and community awareness activities. Spark Morgan seeks to ignite and celebrate philanthropy across Morgan County while strengthening and supporting nonprofit organizations that serve the county's residents.

Since 2003, Spark Morgan! has granted more than \$300,000 to area nonprofits to respond to the changing needs of the community. To include a local perspective in this work, Spark Morgan! has an Advisory Committee comprised of knowledgeable leaders representing diverse segments of the community. Committee members live and work in Morgan County and are dedicated to nurturing local philanthropy and responding to the needs of their community.

#### **New in 2017 for organizations based in Clayton or Morgan counties**

Organizations that meet all the eligibility criteria on pages 6 and 7 will be considered for a grant within their respective Impact Areas. Organizations that only meet the criteria outlined on page 8 will be considered for a \$5,000 grant for a 12-month period.

# Guidelines

## FUNDING OPPORTUNITY

The Community Foundation for Greater Atlanta will offer one funding opportunity in 2017 for General Operating Support:

### 2017 SCHEDULE

Ongoing	Organizational Profile and Common Grant Application are available to nonprofits
Friday, March 17	Online orientation session (via ReadyTalk)
By Friday, April 14	Nonprofits complete or update their Organizational Profile and Common Grant Application
Friday, May 19	Selected applicants contacted and invited to submit a Grant Application Supplement
Friday, June 9	Grant Application Supplement due
Friday, July 21	Selected applicants contacted and site visits confirmed
July 27 – August 23	Site visits are conducted
October 25	Applicants notified of funding decision

### APPLICATION PROCESS

- 1] Organizations must complete or update their Organizational Profile and Common Grant Application using the online portal on our website to be eligible for funding opportunities
- 2] Foundation staff reviews Organizational Profiles and Common Grant Applications to determine which organizations should move forward in the process
- 3] Invited organizations submit Grant Application Supplement and required attachments through the nonprofit online portal
- 4] Foundation staff reviews all Grant Application Supplements and selects organizations to receive site visits
- 5] Foundation staff and board members conduct site visits
- 6] Funding recommendations are made to the Foundation's Board of Directors and grants are awarded
- 7] Organizations receiving grants will be required to report in 12- or 24-month intervals

**Nonprofit organizations that meet the following requirements are eligible to apply for a General Operating Support (GOS) grant:**

- Must be located and providing services within the Foundation's 23-county service area; all GOS grant funds must be spent within the 23-county service area;
- Must be classified by the U.S. Internal Revenue Service under Section 501(c)(3) of the I.R.S. code as a nonprofit, tax-exempt organization, donations to which are deductible as charitable contributions under Section 170 (c)(2) and the I.R.S. determination must be current;
- Must be registered with the Georgia Secretary of State as a nonprofit (click here to verify: <https://ecorp.sos.ga.gov/BusinessSearch>);
- Must have a minimum two-year operating history after the date of receipt of its 501(c)(3) classification;
- Must have annual operating expenses greater than \$100,000 as reflected in the most recently filed I.R.S. Form 990 (click here for more information on Form 990: <https://www.irs.gov/Charities-&Non-Profits/Form-990-Resources-and-Tools>);
- Must have at least one full-time paid employee (paid minimum wage or more, working at least 35 hours per week, classified as a W-2 employee) for the 12 months prior to submitting an application (*please note that contractors or consultants do not count toward this requirement*);
- Must have a current written strategic or business plan for the whole organization that covers at least 24 months which includes the organization's entire current fiscal year and includes the following:
  - Mission and vision statements
  - Stakeholder participation (staff, board, consumers/clients, volunteers, etc.)
  - Strategic goals and measureable objectives
  - Implementation plan showing action steps, a timeline and assigned staff and board responsibilities
  - Quarterly, semi-annual or annual written assessment by staff and board to measure organizational progress towards goals

*Preference will be given to strategic plans that include reference to resources (expenses and staff/board capacity) necessary to achieve goals and objectives*

**NOTE:** The Foundation's evaluation of an organization is heavily dependent on the content and execution of its strategic plan. If the applying organization is finishing its current strategic plan within the next six months and does not already have a replacement plan written or a written, board-approved plan and schedule for replacing it, the Foundation will be limited in ability to fully evaluate the organization and it may impact the grant decision.

- Must have *audited or reviewed* financial statements that follow Generally Accepted Accounting Principles (GAAP) or Government Auditing Standards (GAS) for the past two completed fiscal years as required by budget size. Organizations with annual budgets over \$250,000 must have audited financial statements; organizations with annual budgets between \$100,000 and \$249,999 must have reviewed financial statements. Please note: applications to the Atlanta Aids Fund must include audited financials.

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# Eligibility

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- Must have filed the end of grant report for any previous General Operating Support grant (Common Good Fund, Metropolitan Atlanta Arts Fund, Spark Clayton! and Spark Morgan!);
- Must have a Board of Directors where 100% of members made personal cash donations or made financially measurable in-kind contributions during the last completed fiscal year (*please note there is no required cash donation amount*);
- Must have a Board of Directors representing the diversity and demographics of the community served, including individuals with varied skill sets and the committee structure necessary to succeed.
- **National organizations with local chapters/affiliates or programs:** local chapters/affiliates or programs must demonstrate local control over their finances and operations, and have a local governing board. Written documentation delineating local control over the local chapter/affiliate must be available upon request.

## ADDITIONAL ELIGIBILITY CRITERIA FOR ARTS ORGANIZATIONS

- Must have an annual operating budget less than \$2 million as reflected in the expense line on the most recently filed I.R.S. Form 990;
- Must have a primary focus on presenting, producing, or providing arts programming for the public;
- Must pay artists and performers associated with cultural programming; and
- Must have an artistic emphasis which falls into one or more of the following art forms: dance, design, folk arts, literature, media arts, music, opera, performance arts, theatre or visual arts.

## NOTES ON ELIGIBILITY FOR ARTS ORGANIZATIONS

It is unlikely that the following arts organizations or programs will receive a grant:

- Programs organizationally or financially connected to colleges, universities or religious organizations, even though the program may be operated separately;
- Community or civic centers, unless the organization's mission is solely arts-oriented or it can be demonstrated that the grant funding will directly support a major arts division with its own administration; and
- Arts service organizations which do not directly present, produce or provide arts programming.

In most cases, organizations must have received at least one grant from the National Endowment for the Arts, South Arts, Georgia Council for the Arts or a local arts agency in the two years prior to submission of an application.

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### ADDITIONAL ELIGIBILITY CRITERIA FOR AIDS ORGANIZATIONS

The Atlanta AIDS Fund offers restricted operating support to fund the ongoing program administrative and infrastructure costs for organizations that have a clear HIV/AIDS (intervention, prevention and advocacy) component to their work, but not necessarily stated in their missions, and meet all of the following criteria:

- HIV/AIDS program budget more than \$60,000 (funding will be restricted to up to \$75,000 or no more than 25% of program budget)
- Program budget must be able to be delineated within the organization's budget
- At least one dedicated program staff (salaried – no contractor/consultant)
- Programs/activities must be detailed in the organization's strategic plan and be able to demonstrate that the program is an integral component to the organization and HIV/AIDS advocacy, prevention education and service community
- Programs/activities must be based on Evidence Based Interventions (EBIs)/Diffusion of Effective Behavioral Interventions (DEBIs) or be innovative in nature and provide a research based hypothesis on why they are effective
- 2016 grantees must have submitted mid-grant reports to be eligible; prior grantees must have submitted the end-of-grant reports to be eligible

### ADDITIONAL ELIGIBILITY CRITERIA FOR CLAYTON COUNTY ORGANIZATIONS

Spark Clayton! offers general operating support grants to organizations based and providing services in Clayton County. Organizations wishing to be considered for a grant from Spark Clayton! must meet the criteria on pages 6 and 7; the exceptions on eligibility criteria are outlined below:

- Must be located and providing services in Clayton County; all grant funds from Spark Clayton! must be spent within Clayton County
- Must have annual operating expenses of at least \$25,000 as reflected in the most recently filed I.R.S. Form 990: (click here for more information on Form 990: <https://www.irs.gov/Charities-&-Non-Profits/Form-990-Resources-and-Tools>)

### ADDITIONAL ELIGIBILITY CRITERIA FOR MORGAN COUNTY ORGANIZATIONS

Spark Morgan! offers general operating support grants to organizations serving Morgan County residents. Organizations wishing to be considered for a grant from Spark Morgan! must meet the criteria on pages 6 and 7; the exceptions on eligibility criteria are outlined below:

- Must be located and/or providing services in Morgan County; all grant funds from Spark Morgan! must be spent within Morgan County; *priority will be given to organizations located in Morgan County*
- Must have annual operating expenses of at least \$25,000 as reflected in the most recently filed I.R.S. Form 990: (click here for more information on Form 990: <https://www.irs.gov/Charities-&-Non-Profits/Form-990-Resources-and-Tools>)
- Organizations applying to Spark Morgan! are **not** required to have at least one full-time paid employee
- Organizations applying to Spark Morgan! are **not** required have a minimum two-year operating history after the date of receipt of its 501(c)(3) classification



## **INELIGIBLE ORGANIZATIONS**

The following organizations are not eligible to apply for funding:

- Private and publicly funded schools (K-12) and institutions of higher learning. This does not include nonprofit charter schools;
- Organizations that exclusively raise funds for publicly funded schools (K-12), institutions of higher learning and government agencies;
- Organizations that require participation in religious services and/or education as a condition of receiving services; and/or
- Organizations that have discriminatory policies and/or practices on the basis of race, color, national origin, age, disability, sex/gender, marital status, familial status, parental status, religion, sexual orientation, genetic information or political beliefs.

## **INELIGIBLE USES OF FOUNDATION FUNDS**

Foundation funds may not be used to support the following:

- Religious services and/or religious education;
- Fundraising and marketing events;
- Endowment funds;
- Capital campaign contributions (for building construction or renovation) or use of funds to cover capital campaign feasibility studies or campaign implementation expenses. This does not include regular maintenance and capital improvements.

### **What's new in 2017?**

Spark Clayton! and Spark Morgan! will award grants in 2017 through the General Operating Support grant cycle, joining the Common Good Fund, Metropolitan Atlanta Arts Fund and Atlanta AIDS Fund in making grants to support the ongoing operations and programming offered by nonprofits in the Foundation's 23-county service area. Please review the information on page 4 regarding the different funding opportunities available.

As part of the Community Foundation's 2016-2018 strategic plan, Foundation staff is enhancing and expanding the online portal through which the Foundation captures information about nonprofits and their needs in one place. Organizations interested in being considered for funding from any competitive grant program the Foundation offers will need to complete an Organizational Profile and the Common Grant Application. If your organization is chosen to proceed to the next stage of the process, you will be asked to submit a Grant Application Supplement through the portal.

### **How are organizations evaluated?**

Priority will be given to organizations that:

- Submit applications reflecting organization-wide planning and decision-making;
- Have a clear and articulated vision for implementation and success;
- Demonstrate a high value for diversity in all forms;
- Exhibit strong financial management;
- Demonstrate active use of a current strategic or business plan;
- Are continually updating plans and programs to reflect the current economy and community needs;
- Have engaged boards that contribute financially;
- Budget, evaluate and have stated goals for each program;
- Partner with others for organizational efficiency; and
- Align with the Foundation's Impact Areas and associated metrics.

### **How do I learn more about general operating support?**

Community Foundation staff will provide one online orientation session on Friday, March 17. A link to register for the webinar is on the General Operating Support page on our website. Prospective applicants who are unable to join the session are encouraged to review the online orientation session presentation (PowerPoint and audio) that will be posted on our website in the week following the session.

If you have questions after reviewing the guidelines and the orientation session webinar, please email us at [grants@cfgreateratlanta.org](mailto:grants@cfgreateratlanta.org).