San Antonio Area Foundation
Where Giving and Community Connect

2021 Community Information Session

Meeting Objectives

- Welcome & Meet the CEI Team
- Our Continued Journey
- 2021 Process
    - Eligibility & Application
    - Other upcoming processes
- Q & A

Meet the CEI Team

Patricia Mejia
Vice President

Jane Paccione
SALSA Managing Director
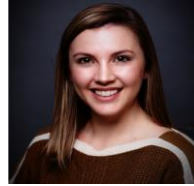
Catherine Garcia
Grants Administrator

H. B. Cavalcanti
Director of Research and
Community Impact

Stephanie LaFroscia
Senior Program Officer

Jennifer Cook
Senior Program Officer

Cadence Corbin
Program Officer

Gavin Nichols
Senior Program Officer

San Antonio Area Foundation
Where Giving and Community Connect
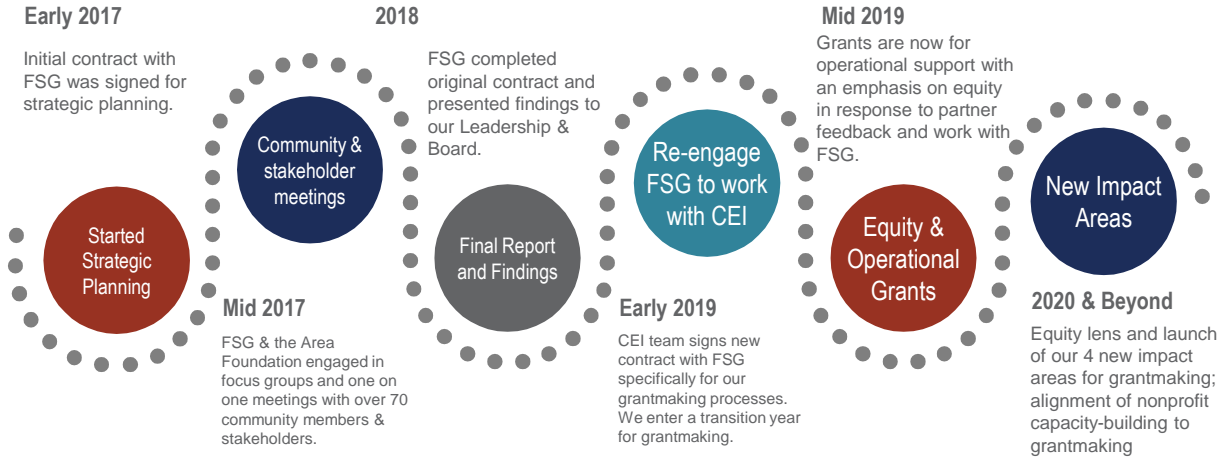
CONNECT WITH US!

San Antonio Area Foundation
Where Giving and Community Connect

Our Continued Journey

Building Trust through Transparency

CEI Strategic Planning Process

Early 2017

Initial contract with FSG was signed for strategic planning.

2018

FSG completed original contract and presented findings to our Leadership & Board.

Mid 2019

Grants are now for operational support with an emphasis on equity in response to partner feedback and work with FSG.

Community & stakeholder meetings

Re-engage FSG to work with CEI

New Impact Areas

Started Strategic Planning

Final Report and Findings

Equity & Operational Grants

Mid 2017

FSG & the Area Foundation engaged in focus groups and one on one meetings with over 70 community members & stakeholders.

Early 2019

CEI team signs new contract with FSG specifically for our grantmaking processes. We enter a transition year for grantmaking.

2020 & Beyond

Equity lens and launch of our 4 new impact areas for grantmaking; alignment of nonprofit capacity-building to grantmaking

San Antonio Area Foundation
Where Giving and Community Connect

CONNECT WITH US! 🅕 🐦 in ▶ 🌐

North Star:
San Antonio area residents are deeply connected, have equitable opportunities to thrive, and contribute to the vitality of the community
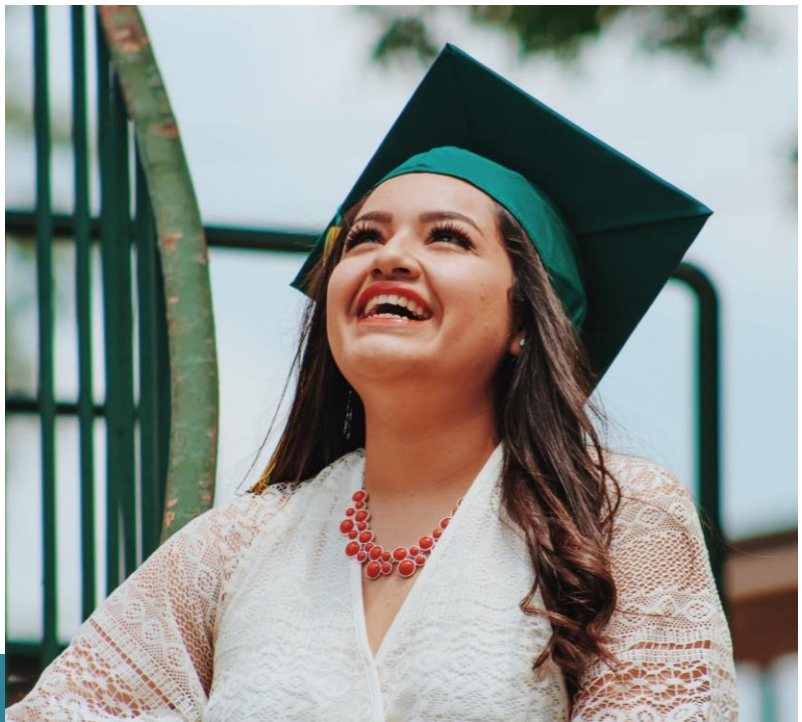
San Antonio Area Foundation
Where Giving and Community Connect

What is Equity?

<u>Definition</u>: The lack of disparity in life outcomes among groups of people classified by identity associations such as race, gender, ethnicity, age, physical ability, sexual orientation, etc.

Improving equity means promoting justice and fairness within the procedures, processes, and distribution of resources by institutions and systems.

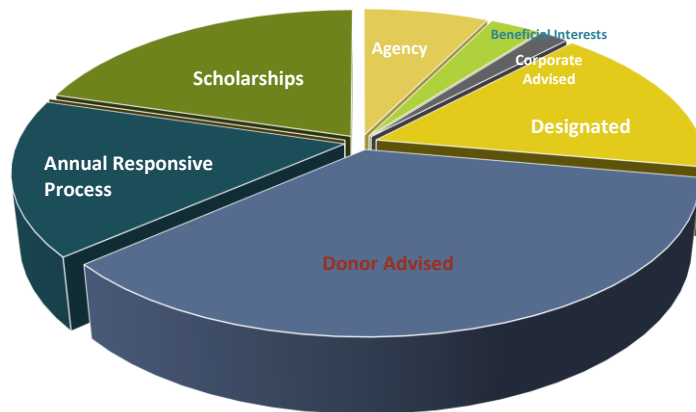**Equity has been achieved when who you are or where you are from no longer predicts your life outcomes.**

The work and complexity of Community Foundations

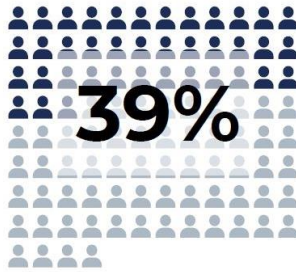# Highlighting diversity in board leadership

Female Board Representation
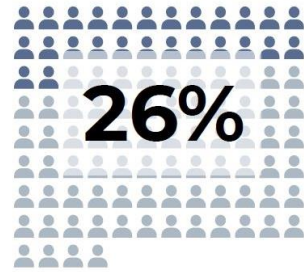
64%

64% of our grantees have boards that are 50% or higher female

Hispanic Board Representation

39%

39% of our grantees have boards that are 30% or higher Hispanic

African-American Board Representation

26%

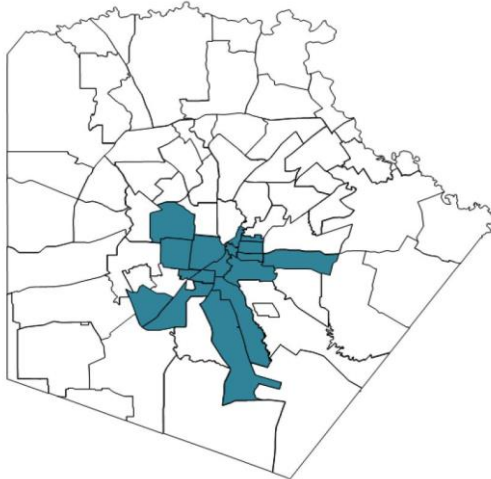**26%** of our grantees have boards that are 10% or higher African-American

Serving areas with the greatest need

SAN ANTONIO

65% of grantees serve in 15 of SA's 17 distressed zip codes

42% of grantees serve 2 or more of those 15 zip codes

34% operate in 78207, the most distressed zip code in SA

2021 Process: Eligibility

- Grants are awarded to nonprofit organizations exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, schools, churches or governmental bodies that serve Bexar and the following surrounding counties: Atascosa, Bandera, Comal, Guadalupe, Kendall, Medina and Wilson.

- For this process, your organization must have a minimum of one year as an IRS designated 501(c)(3) by the open date of our application (May 3, 2021) and

- Must have a minimum organization expense budget of $40,000 in your fiscal year 2020.

San Antonio Area Foundation
Where Giving and Community Connect

CONNECT WITH US!

Application

Community impact

- A clear vision of the organization's role in making a difference in the community.
- The organization plays a unique and important role in its ecosystem and has broader impact for the sector.

- Summarize community needs

- Unique or/or innovative about your work

- High level results

San Antonio Area Foundation
Where Giving and Community Connect

CONNECT WITH US!

Application

Investment in Equity	• The organization demonstrates a commitment to equity through its statements, goals, actions and progress.	→	• Selecting zip codes • Demographic breakdown • Engagement & organization decision making

Application

Strength of Organization	• The organization's board and staff are engaged in fundraising and sustaining the organization; have a clear commitment to mission and demonstrate the capacity to carry out the work. • The work is guided by a strategic plan, and the organization's programs align with its mission.	→	• Organization description and background • Staff list

Application

Financial Health

• The organization is in reasonable financial condition.

• Budget narrative

• Financial Summary

Application

Impact Area and sector selection

Identifying your budget range

Board questions and Staff lists

Supplemental materials

2021 Process: What's new this year

- We are moving to a two-year process
  - We will have a grant process every other year
  - After this year, the next grant process will be in 2023

- Grants will be two-year grants
  - 1st payment will be made when the grant is awarded
  - A grant report will be required one year later
  - 2nd payment will be made after the report has been reviewed and approved.

2021 Process: We do not fund

- Endowments
- Debt reduction
- Scholarships for colleges and universities (through this process)
- Funds to individuals
- Capital Campaigns (through this process)
- Political activities, organizations, or lobbying efforts intended to influence legislation

2020 Process: Operating Support Award Amounts

Budget Size	Grant Award
$40,000- $74,999	$8,000
$75,000-$249,999	$15,000
$250,000-$999,999	$25,000
$1,000,000 +	$50,000

San Antonio Area Foundation
Where Giving and Community Connect

CONNECT WITH US!

2021 Process: Reminders!

- We will be available to assist you up until 4 PM on Friday, June 4th.

- You will have until Sunday, June 6th at 11:59 PM to submit your application.

- Print a copy to see that all required documents are attached.

- If possible, have someone else read it and double check it.

- Always remember, it's okay to submit before the deadline!

- Call if you have a question!

San Antonio Area Foundation
Where Giving and Community Connect

CONNECT WITH US!

2021 Animal Services Timeline

Activity	Date
Application Open on website	May 3rd (Mon)
Community Information Meetings (via Zoom)	May 6th (Thu) 2:00 – 3:30pm May 10th (Mon) 1:30 – 3;00pm
Application Deadline (5 weeks)	June 6th (Sun)
Application Review (8 weeks)	June 7th – July 30th
Grant notifications	Week of August 2nd

San Antonio Area Foundation
Where Giving and Community Connect

CONNECT WITH US!

Connecting with our team

- Catherine Garcia, Grants Administrator, cgarcia@saafdn.org, (210) 228-3757 (for technical issues related to the online application)

- Gavin Nichols, Senior Program Officer, gnichols@saafdn.org, (210) 242-4720 (o), (210) 279-7830 (m)

San Antonio Area Foundation
Where Giving and Community Connect

CONNECT WITH US!

San Antonio Area Foundation
Where Giving and Community Connect

Resources

Remember that statement "more than grantmaking?" Here we go!

Supporting, Strengthening and Sustaining Nonprofits

- Nonprofit management certifications

- Training events

- Membership program

- Facility usage

- Resource library

San Antonio Area Foundation
Where Giving and Community Connect

CONNECT WITH US!
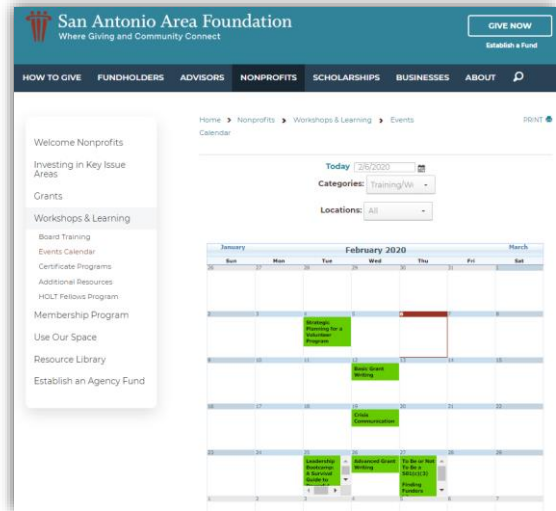

San Antonio Area Foundation
Where Giving and Community Connect

Nonprofit Certifications and Cohort Programs

Let's Learn More!

Making Nonprofits Stronger

- Providing affordable, customer-driven training for nonprofit professionals

- Encouraging life-long learning

- Events calendar – www.saafdn.org

What We Offer

- The University of the Incarnate Word, H-E-B School of Business & Administration
  - Supervisory & Management Certificate

- Our Lady of the Lake University, School of Business & Leadership
  - Fundraising
  - Leadership
  - General Nonprofit Management

UNIVERSITY OF THE INCARNATE WORD.
H-E-B SCHOOL of BUSINESS & ADMINISTRATION

OLLU
OUR LADY OF THE LAKE UNIVERSITY

Which is Right For You?

OLLU Nonprofit Management Certification	UIW Supervisory & Management Skills Certification
General management, fundraising and leadership development	Supervisory skills for first-time managers
Self-paced, up to two years to complete	Five-month cohort, with nine sessions
Taught by local experts	Taught by UIW Faculty
36 to 60 hours, depending upon the track	30 hours
Cost: $595 - $1,050	Cost: $695

HOLT Values Based Leadership™ Fellows Leadership Program

- Training and support for new nonprofit CEOs and Senior-Level Leaders, including:
  - Values Based Leadership™ development with HOLT Development Services, Inc.
  - Nonprofit management training
  - Monthly mentoring with seasoned CEOs
  - Complimentary admission to Board Boot Camp 2020 or Board Principles workshops

- Fee: $2,495 with a reimbursable amount of $500 upon satisfactory completion

San Antonio Area Foundation
Where Giving and Community Connect

Board Training Options

Creating sustainability through a well-trained board of directors

Board Training

- Training to help board members learn about roles, responsibilities and effective governance practices.

- Board Principles Series – Quarterly

- Board Bootcamp

- Board Day (2021)

Facility Usage

Meeting space for your needs

Membership Program

Even more benefits when becoming a member

Benefits of Membership

- Quarterly lunch & learn opportunities
- One free learning workshop
- One free all-day event
- Reserve rooms up to twice a month, and up to a year in advance!

- Social media spotlight on Area Foundation channels
- Listing on Area Foundation website
- Highly discounted use of online board management system (BoardEffect)

San Antonio Area Foundation
Where Giving and Community Connect

CONNECT WITH US!

San Antonio Area Foundation
Where Giving and Community Connect

Library

More than books here!

Library Amenities – Free!

- 250+ books on a wide array of topics
- Free access to online national grant search tool

- Hours of operation:
  - Mon-Thurs; 9 a.m. to 4 p.m.
  - Fri; 9 a.m. to 2 p.m.

San Antonio Area Foundation
Where Giving and Community Connect

CONNECT WITH US!

Library Amenities – Details on Funder Search Capabilities

- The Area Foundation is a partner of the Foundation Center's Funding Information Network.
- You benefit, as you can search for funders across the nation!
- Free workshop to learn more:
  - Online
  - Use of Foundation Center Online
    - One 24-hour period per month
  - Email Learning@saafdn.org

FOUNDATION CENTER
Knowledge to build on.

San Antonio Area Foundation
Where Giving and Community Connect

CONNECT WITH US!