

San Antonio Area Foundation

Where Giving and Community Connect

2023 Community Information Session

Meet the CEI Team



Patricia Mejia

Vice President,
Community Engagement and Impact



Jennifer Cook

Director of Strategy and Impact



Catherine Garcia

Grants Administrator



Jesus Garcia-Gonzalez

Senior Program Officer



Andrea Figueroa

Senior Program Officer



Stephanie LaFroschia

Director of Grants and
Community Engagement



Gavin Nichols

Senior Program Officer



Jane Paccione

Managing Director,
Collective Impact



Jo Ann Tobias-Molina

SALSA Program Coordinator



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.

Started Strategic Planning

Community & stakeholder meetings

Final Report and Findings

Re-engage FSG to work with CEI

Equity & Operational Grants

New Impact Areas

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






Mission:
The San Antonio Area
Foundation serves as your
most trusted and
impactful philanthropic partner.



Vision:
To close the opportunity gap for the
people in San Antonio who need
it most.

What is Equity

Defined as 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.

Trust-Based Philanthropy

When we trust each other,
we work together in a more
meaningful way.

Trust-Based Philanthropy Values



Work for
systemic equity



Redistribute
power



Center
relationships



Partner in a
spirit of service



Be accountable



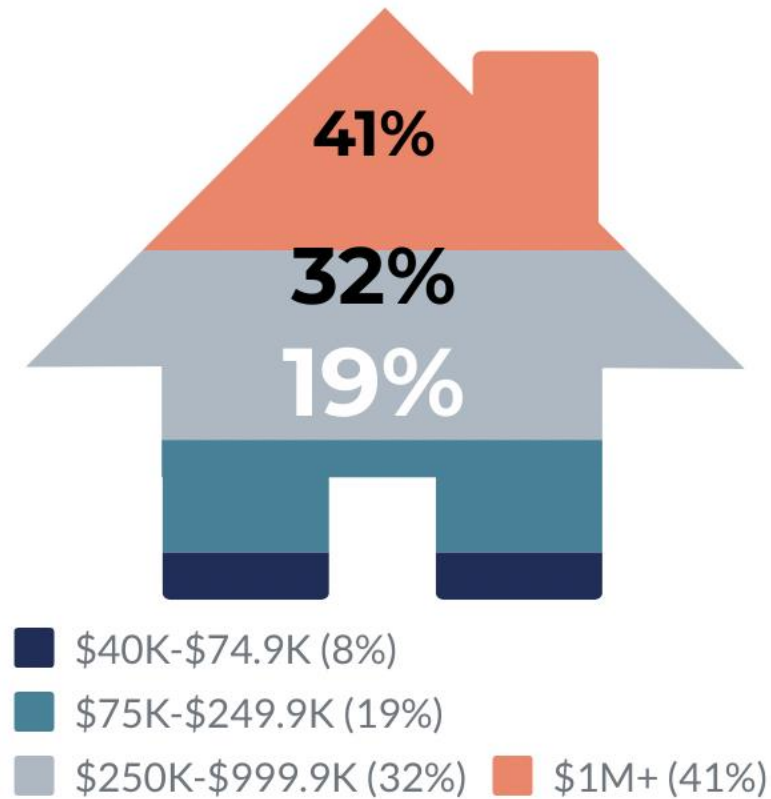
Embrace
learning

Our Grantmaking Approach

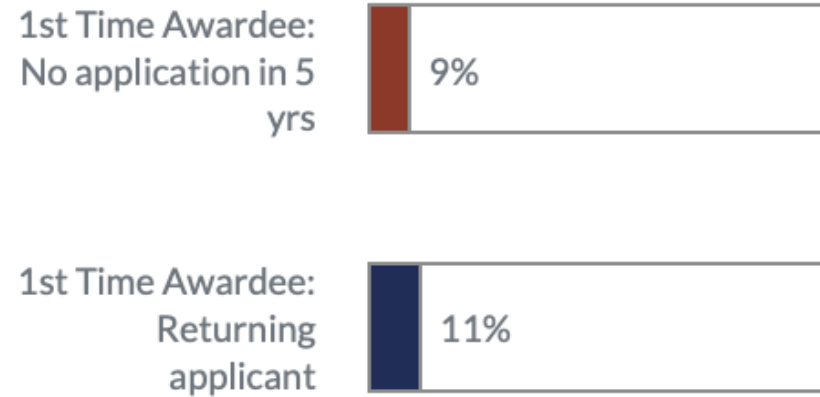
- **Equitable Grant Practices**
- **Targeted**
- **General Operating Support**
- **Community Input**

2020 Snapshot

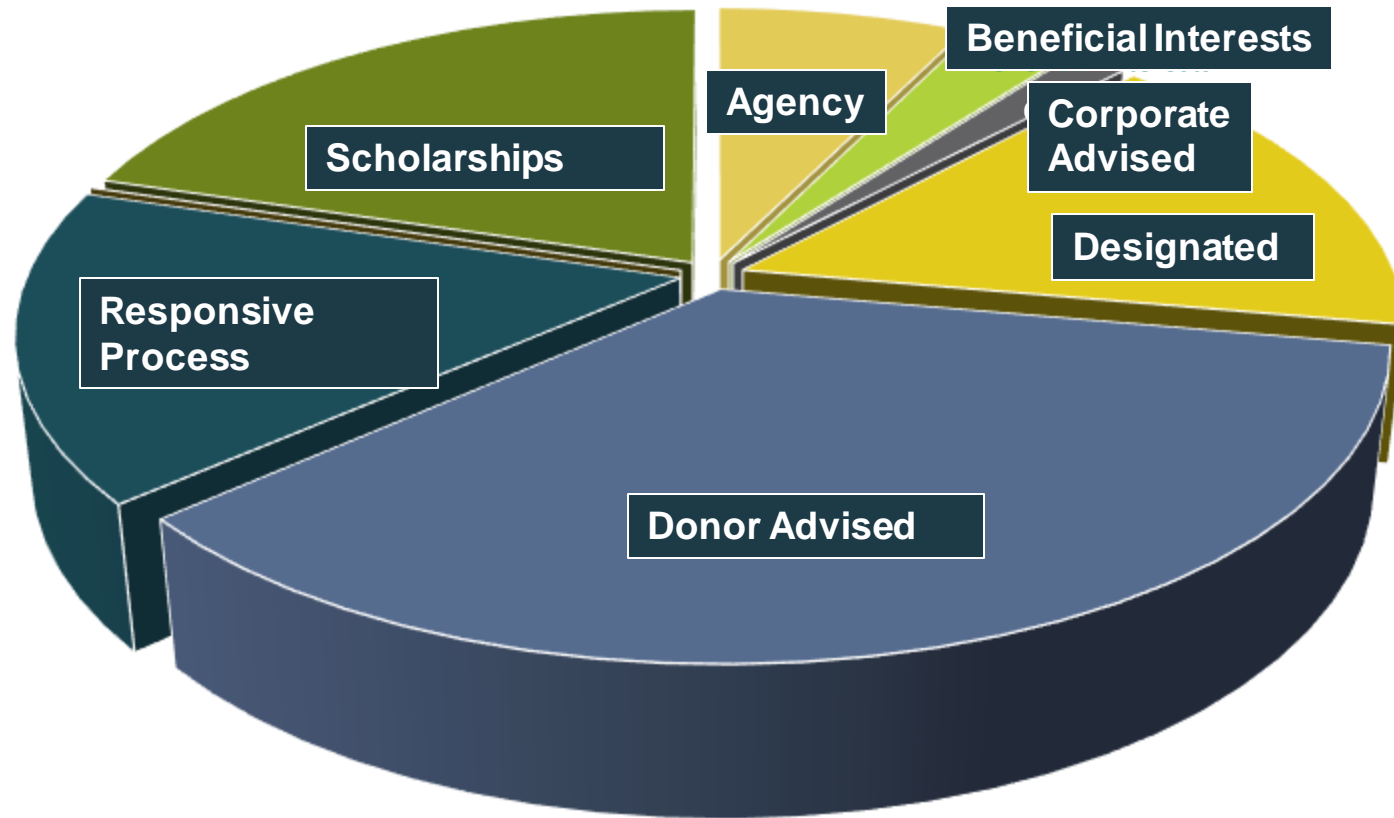
Budgets Large and Small



Reaching New Applicants



Community Foundations





\$48,481,344

TOTAL GRANTMAKING IN 2021 THROUGH THE SAN ANTONIO AREA FOUNDATION

\$26,093,081
Donor Advised Funds (DAF)

\$3,725,445
Responsive Grantmaking

\$5,154,161
Scholarships

\$6,297,261
Supporting Organizations

\$4,387,282
Designated

\$2,824,114
Additional Grants

OUR DONORS REPRESENT A MOSAIC OF GENEROSITY, GIVING TO ALL FACETS OF OUR COMMUNITY AND ALWAYS GIVING FROM THE HEART. AS YOUR MOST TRUSTED AND IMPACTFUL PHILANTHROPIC PARTNER, IT IS OUR PRIVILEGE TO SAY “THANK YOU.”

HERE IS THE DIFFERENCE YOU MADE IN 2021.

Total Assets Under Management	\$1.1 BILLION
Charitable Funds	550+
Total Grantmaking	\$48.4 MILLION
To Nonprofits	\$41.4 MILLION
In Scholarships	\$5.1 MILLION
In Hardship Grants	\$1.9 MILLION
Total Nonprofit Grants	1,375
Nonprofit Community Leaders Trained	1,557



San Antonio Area Foundation

Where Giving and Community Connect

Responsive Grant



Responsive Grant

- Unrestricted, general operating support
- Three-year grant term
- Four Impact Areas in two cycles:
 - Cycle 1
 - Cultural Vibrancy
 - Youth Success
 - Cycle 2
 - Successful Aging
 - Livable and Resilient Communities



Cultural Vibrancy

Supports organizations and programming that

- Ensure access to arts and cultural programming and encourage broad participation from all parts of our community
- Reflect the diverse cultures of the greater San Antonio area and
- Promote the value of arts and culture through arts education, advocacy, and the integration of arts and culture across sectors through innovative collaboration.





Youth Success

Supports organizations and programs that

- Encourage the achievement of all youth within the community throughout a student's education (cradle to career)
- Address disparities across youth educational outcomes
- Provide equitable access to opportunities and
- Engage communities by strengthening youth leadership and providing educational activities for parents and caretakers.

Successful Aging

Supports organizations and programs that

- Address the needs of older adults and their caregivers
- Recognize their ongoing contributions to diverse communities across the San Antonio area
- Provide opportunities for older adults to engage and connect and
- Build awareness of and collaboration between existing resources.





Livable and Resilient Communities

- Supports organizations, programs and initiatives that further access to affordable, safe, and stable housing; transportation; wellness resources and public spaces
- Public-private partnerships to create sustainable opportunities and address disparities in these areas across the San Antonio area and
- Platforms for community/stakeholder voice and leadership

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 application deadline

Financial Summary Form

Financial Summary

Instructions: You MUST use this form. Provide organization's budget for current fiscal year and previous two (2) years of historical financial information in this spreadsheet. The Area Foundation retains the right to request full financial disclosure.

	Fiscal Year 2023		Fiscal Year 2022		Fiscal Year 2021	
	<i>(mm/dd/yyyy)</i>		<i>(mm/dd/yyyy)</i>		<i>(mm/dd/yyyy)</i>	
	\$ Amount	(%)	\$ Amount	(%)	\$ Amount	(%)
Revenue						
Foundation Grants		0%		0%		0%
Corporate Grants		0%		0%		0%
Government Grants		0%		0%		0%
Individual Gifts		0%		0%		0%
Contracts		0%		0%		0%
Membership Dues		0%		0%		0%
Program Fees		0%		0%		0%
Reimbursements		0%		0%		0%
Fundraising Events		0%		0%		0%
Dividends/Interest on Securities		0%		0%		0%
Other Investment Income		0%		0%		0%
In-Kind Support*		0%		0%		0%
Other <i>(provide details below)</i>		0%		0%		0%
Total Revenue	\$0	0%	\$0	0%	\$0	0%

Provide details on "Other" and identify significant grants, government contracts or other revenue as needed

	Fiscal Year 2023		Fiscal Year 2022		Fiscal Year 2021	
	\$ Amount	(%)	\$ Amount	(%)	\$ Amount	(%)
Expenses						
Salaries		0%		0%		0%
Payroll taxes/Benefits		0%		0%		0%
Contract Labor/Consultants		0%		0%		0%
Depreciation		0%		0%		0%
Insurance		0%		0%		0%
Bank Fees/Interest		0%		0%		0%
Conferences/Meetings		0%		0%		0%
Program Expenses		0%		0%		0%
Travel/Mileage		0%		0%		0%
Marketing/Printing/Publications		0%		0%		0%
Fundraising		0%		0%		0%
Rent/Occupancy		0%		0%		0%
Telephone/Technology/Utilities		0%		0%		0%
Postage/Shipping		0%		0%		0%
Equipment/Supplies		0%		0%		0%
In-Kind Expense*		0%		0%		0%
Other <i>(provide details below)</i>		0%		0%		0%

***All in-kind revenue must be offset by in-kind Expense.**

Total Expenses	\$0	0.0%	\$0	0.0%	\$0	0.0%
Excess (Deficit) for Year	\$0	0.0%	\$0	0.0%	\$0	0.0%

Provide details on "Other" and identify significant expenses as needed

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

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
- Board 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**

Grant amounts by Budget Size

Budget Size	Grant Award
Under \$40,000	\$4,000
\$40,000- \$74,999	\$8,000
\$75,000-\$249,999	\$15,000
\$250,000-\$999,999	\$25,000
\$1,000,000 +	\$50,000

Helpful Reminders

- Technical assistance is available until 4 PM of the deadline day
- You will have until 11:59 PM to submit your application
- Virtual Office Hours, Wednesdays 4pm – 6pm on Zoom
- Grant writing support for organizations with budgets under \$75,000
- Print a copy to see that all required documents are attached
- If possible, have someone else read it and double check it

2023 Responsive Timeline: Cycle One

Cultural Vibrancy and Youth Success

- January 18: Application Open
- March 1: Application Deadline
- June: Award Notifications

2023 Responsive Timeline: Cycle Two

Successful Aging & Livable & Resilient Communities

April 26: Application Opens

June 7: Application Deadline

September: Award Notification

Connecting with our team

- **Technical Support related to online application:** Catherine Garcia
cgarcia@saafdn.org, (210) 228-3757
- **Youth Success:** Andrea Figueroa
afigueroa@saafdn.org, (210) 242-4773
- **Cultural Vibrancy:** Stephanie LaFroscia
slafroscia@saafdn.org, (210) 228-3754
- **Livable and Resilient Communities:** Jesus Garcia-Gonzalez
jggonzalez@saafdn.org, (210) 228-3751
- **Successful Aging:** Gavin Nichols
gnichols@saafdn.org, (210) 242-4720



**ANIMAL SERVICES
GRANTS**



**BIOMEDICAL RESEARCH
GRANTS**



**CAPITAL NAMING
RIGHTS GRANTS**



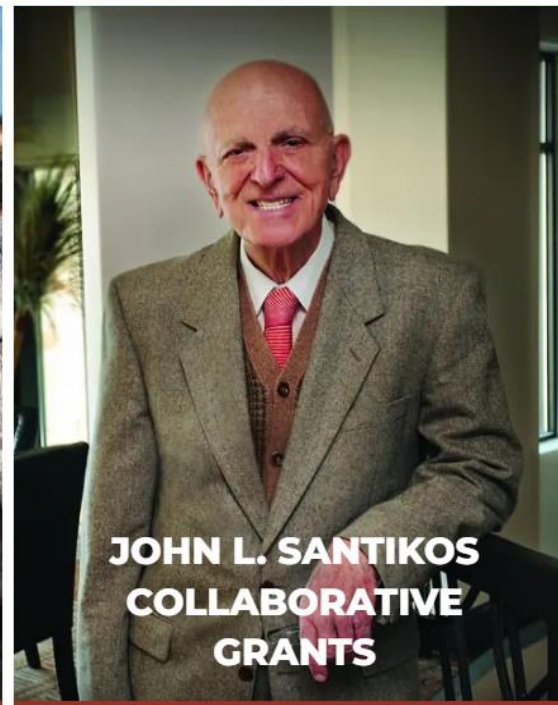
**COMMUNITY OUTREACH
FUND GRANTS**



**COVID-19 RESPONSE
FUND GRANTS**



**DISASTER RELIEF
GRANTS**



**JOHN L. SANTIKOS
COLLABORATIVE
GRANTS**



**SPECIAL AND URGENT
NEEDS GRANTS**



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 (new facility coming soon!)
- Resource room (available in our new facility)





San Antonio Area Foundation

Where Giving and Community Connect

Nonprofit Certificate and Cohort Programs

Building the Capacity of Nonprofit Leaders and Volunteers

Making Nonprofits Stronger

- Providing affordable, customer-driven training for nonprofit professionals and volunteers
- Building connections and peer relationships
- Encouraging life-long learning
- For more information – www.saafdn.org



Certificate Programs

- Supervisory and Management Program
 - Builds supervisory skills of frontline and midlevel managers
 - Evidence-based curriculum taught by university faculty
 - 8th cohort underway – fee \$695
- Nonprofit Management Certificate Program
 - Essential topics -- budgeting, fundraising, leadership, volunteer management, board governance and more
 - For those interested in learning about nonprofit best practices or new to the sector
 - Offered twice annually – fee \$860
 - Enroll in individual sessions - \$80 each



Which is Right For You?

Nonprofit Management Certificate	Supervisory & Management Skills Certificate
Leadership, fundraising, board governance, financial management and more	Supervisory skills for first-time managers
Two-month cohort, 12 sessions	Two-month cohort, nine sessions
Taught by Subject matter experts	Taught by University Faculty
36 hours	30 hours
Cost \$860	Cost: \$695
Certificate upon completion	Certificate upon completion

Building NP Technical Skills -- *NEW*

- Positions nonprofit leaders with technical expertise and insight to lead their organizations into the future
- Explores data analytics and visualization, innovation process management and cybersecurity
- Research-driven content and experiential activities
- Assigned readings and self-reflection
- Taught by university faculty
- Earn certificate from UTSA and CEUs
- 15-hour program – fee \$1200



HOLT Values-Based Leadership™ Fellows Leadership Program

Leadership Training alongside executive peers

- Builds understanding of and confidence in CEO and senior-level roles
 - Nationally-recognized proven leadership curriculum
 - Includes self-assessments
- Nonprofit Management Training
 - Fundraising, DE&I, board governance, HR basics and more
 - Taught by subject matter experts
 - 8-month program
 - Fee - \$1995





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 Workshops
- Board Bootcamp – offered twice a year
- Board Day – offered occasionally





San Antonio Area Foundation

Where Giving and Community Connect

Facility Usage

Meeting space for collaboration and fostering ideas

Facilities

UNDER CONSTRUCTION AND COMING SOON!

Our meeting space has been a vital component in connecting our community with providing intentional meeting space for collaboration and growth.

As the San Antonio Area Foundation transitions into a new facility, please expect meeting rooms along with amenities to be available for your needs.

.....more to come !!!





San Antonio Area Foundation

Where Giving and Community Connect

Membership Program

Even more benefits when becoming a member

Benefits of Membership

- Complimentary Members-Only Learning Events
- Prorated plans with "no need to renew" until January 2024
- 25% Discounts on ALL one day and individual seminars
- Access to BoardEffect (for nonprofits with an operating budget of \$5M or less)
- Membership recognition on our website and a social media post





San Antonio Area Foundation

Where Giving and Community Connect

Resource Room

Under construction and coming soon...

Resource Room

The Area Foundation has found a new home that is being redesigned to suit the Area Foundation team and will soon offer first-class meeting and training space for local nonprofits. Please stay tuned for more information regarding the opening of our new office space. Access to the Foundation Directory will resume at that time.

The Area Foundation is a partner of the Foundation Center's Funding Information Network.



FOUNDATION
CENTER

Knowledge to build on.



San Antonio Area Foundation
Where Giving and Community Connect

CONNECT WITH US!

