

Community Issues Grants

2008 Request for Proposals

Proposal Deadline: August 29, 2008

horizons foundation

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How to Apply Workshops

Horizons will hold three “How to Apply” workshops, which will give you an opportunity to walk through the proposal preparation and granting process and ask any questions you have:

- **Wednesday, August 6, 6:00–7:30 p.m.**
Mexican Heritage Corporation
1700 Alum Rock Avenue, San Jose
- **Wednesday, August 13, 6:00–7:00 p.m.**
Flood Building, Conference Room 838
870 Market Street, San Francisco
- **Thursday, August 14, 6:00–7:30 p.m.**
Pacific Center for Human Growth
2712 Telegraph Avenue, Berkeley

Please RSVP to jgomez@horizonsfoundation.org or 415.398.2333 x116 if you plan to attend.

If you are unable to attend any of these workshops and have questions about this year’s grant process or your organization’s proposal, or if you have applied for a Horizons Foundation Community Issues grant in the past three years and would like feedback on your proposal(s), whether funded or declined, please feel free to contact Jewelle Gomez, Director of Grants and Community Initiatives, at jgomez@horizonsfoundation.org or 415.398.2333 x116.

2008 Community Issues Grants Request for Proposals (RFP)

Horizons Foundation, a philanthropic social justice organization, serves the lesbian, gay, bisexual, and transgender community throughout the Bay Area and beyond by supporting nonprofit organizations and increasing the financial resources available to the LGBT community.

In keeping with this mission, Horizons is pleased to announce our 2008 Community Issues grants. Horizons' Community Issues grants are made possible through the contributions of individual donors to Horizons, donors' legacies included in Horizons Foundation's LGBT Community Endowment Fund, and the support of philanthropic partners. A panel of community representatives reviews the proposals and makes recommendations to Horizons' Board of Directors, which must approve the recommendations. We will announce the awards in December 2008.

Our goal in this RFP is to explain as fully and clearly as possible what is needed to apply and what goes into grantmaking decisions. We realize that, as a result, this RFP is extensive. As noted above, if any aspect of the RFP is unclear, please join us for one of the workshops or contact us. We also welcome your feedback on the RFP and any other aspect of the Community Issues process.

Changes for 2008

Horizons has made a substantial change to our Community Issues RFP for 2008—we have eliminated the Issue Areas that previously categorized each proposal. Instead, we have established a set of priorities that we'd like you to address *where they are relevant to the work you're doing*.

These priorities serve two purposes: to help identify critical issues facing our community and to focus more significant funding on those issues. At the same time, Horizons continues to recognize our role as a community foundation that supports a wide range of organizations and projects benefiting the LGBT community.

We don't expect every organization to fit neatly into the priorities; others may include more than one priority in their mission. Some may not work in any of the priorities, but this does *not* eliminate your proposal from consideration. See *Funding Priorities* below for a description of these new categories of support.

Eligibility

To be eligible for a 2008 Community Issues grant, your organization must:

- Be a nonprofit, 501(c)(3) organization, or provide documentation that the organization is fiscally sponsored by an organization that has 501(c)(3) status.
- Have a fiscal sponsor at the time you submit the proposal if you do not have 501(c)(3) status.
- Request support for an organization or program within one or more of these counties: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, Sonoma.
- Have submitted a final report and financial accounting for any past grant(s) which are due.
- Address **all sections** of the proposal. (You may skip the demographic data if it has remained substantially the same since you last applied for a Community Issues grant.)

○ Additional points of eligibility:

- *LGBT organizations* are strongly urged to apply for general operating support, which Horizons is committed to providing. However, LGBT organizations may choose to submit proposals to fund specific programs or projects.
- *LGBT organizations with budgets over \$1 million* may apply **only** for activities to increase giving and develop new fundraising strategies, especially strategies designed to increase the organization's donor base.
- *Non-LGBT organizations* are welcome to apply for support for a specific project serving LGBT people.

The maximum grant award is \$10,000, except for grants to increase giving, which have a maximum award of \$20,000 (LGBT organizations with budgets over \$1 million only). Please note that grant proposals from LGBT organizations with budgets over \$1 million will be considered separately from other proposals. This change is to address the challenge that review panels have faced in comparing proposals from large and small(er) organizations.

Please note that an organization may submit only one proposal for a Community Issues grant.

The following are *not* eligible for support:

- Requests for costs incurred prior to the date of the grant award
- Requests from government agencies
- Requests for capital support, including construction and renovation
- Fundraising event sponsorship
- Projects that directly benefit an individual

Funding Priorities

To help target our funding and achieve maximum impact for the LGBT community with limited resources, Horizons Foundation has designated three priority strategies and four priority issues to be addressed over the next several years. These priorities result from an extensive foundation-wide review and evaluation of Horizons' grantmaking.

Priority Strategies

1. *Policy, advocacy, and systems change* – Organized efforts to effect change in government or private institutions and to educate leaders and others about LGBT issues. This year, special attention will be given to organizations strategizing around equal marriage rights.
2. *Increasing giving to LGBT organizations (for LGBT organizations with budgets of \$1 million or more)* – Support for larger LGBT organizations to increase their own capacities to raise funds, especially from individual donors. (NOTE: LGBT organizations with budgets over \$1 million may apply under this priority ONLY. No other organizations may do so.)
3. *Leadership development* – Projects that address the needs of LGBT leaders through consultants or training in specific skill areas (such as management, board relations, or strategic planning) and are part of a larger organizational capacity building effort. (NOTE: This priority will NOT have specifically allocated funding in 2008, but will be phased in in the near future.)

Priority Issues

1. *Securing equality for LGBT people* – Strategic work to serve and protect the civil and human rights of LGBT people within legal systems and institutions. Given its prominence and indisputable importance at this time in our movement, the struggle for civil marriage and equal relationship rights will be a major focus during this period.
2. *Supporting the equality, health, and empowerment of lesbian, bisexual, and transgender women* – Organizations or projects that address the gender health disparities that dominate the healthcare culture and/or provide programs to engage and empower LBT women.
3. *Meeting the new challenge of the aging LGBT population* – Organizations or projects that have programs for LGBT elders in all areas, including direct services, cultural programs, advocacy, organizing, and education. (NOTE: This priority area will be funded in 2008 primarily through our LGBT WISE program, not through this Community Issues process.)
4. *Achieving racial equity and full participation of people of color in the LGBT community* – Organizations or projects that are based in, and focused on, the issues and needs of LGBT people of color, and/or that address the legacy of racial inequity, and/or that create bridges between people of color communities and non-people of color LGBT communities.

We hope to engage new ideas in these areas as well as support ongoing work. Your organization may already focus on one of these areas, or even a combination of them (for example, an organization developing high school “acceptance” programs for bisexual women or a project benefiting LGBT women of color). Many of our grantees have been supported in previous years in these priority areas, addressing issues such as LBT health, marriage rights, and equity for people of color.

Please note that general operating support is still available to LGBT organizations. You do not have to design a new project—or designate an existing one—to address one or more of the priorities. For example, your organization’s overall mission may directly address one or more of the priorities, such as an organization focused on LBT women, or people of color, or achieving equality for LGBT people.

In addition, we WILL still fund requests that do not fit into a specific priority, including for general support. Issues and populations not designated as priorities, such as the arts and youth, will continue to be considered in the same panel process. Our goal is NOT to push you to change your organization’s mission or move you away from the important work you’re already doing.

Additional Considerations

Horizons will give special consideration to organizations based in the LGBT community and whose principal mission is to serve the LGBT community (“LGBT-primary organizations”). Non-LGBT organizations may apply for support of their LGBT programs, but should do so understanding that priority will go to LGBT-primary organizations.

Organizations and projects that are organized by, and work on behalf of, underserved segments of the LGBT communities will also be viewed positively in our considerations. These include programs that represent and serve diverse constituencies with respect to ethnicity, race, age, gender, gender identity, and physical and mental ability.

Horizons will also give special consideration to programs that have limited appeal to traditional funding sources—either because they are small, new, and/or non-traditional in approach or goals.

Two-Year Support

In a very limited number of cases, the panel reviewing proposals may recommend that an organization receive its request for two years. Organizations that receive two-year grants would not have to reapply the following year. Two-year funding is at the discretion of the review panel and does *not* require any additional information from applicants.

Application Process

The 2008 Community Issues proposal includes nine items. Unless otherwise noted, **five copies** of each (one single-sided original and four DOUBLE-SIDED copies) are required so that members of the community panel can review the proposals:

1. Cover pages
2. Proposal narrative
3. Grant update (if applicable)
4. Budget worksheet(s)
5. Non-discrimination policy statement form
6. List of board members
7. IRS determination (one single-sided copy is sufficient)
8. Financial statement (one single-sided copy is sufficient)
9. Media sample (for art projects only; one DVD or VHS tape is sufficient)

You **must** complete each applicable section. **Please staple each set once in the upper left corner.**

Complete all materials using a typewriter or computer. You can download the RFP (as a Word file or PDF) at www.horizonsfoundation.org. We cannot consider illegible or incomplete proposals.

Please do *not* send a cover letter, letters of reference, or any attachments not specifically requested in this proposal—they will not be forwarded to the grant review panel. Our goal is to minimize the pressure on applicants to produce voluminous proposals.

All proposals, along with all required attachments, must be completed, signed, and mailed by the **postmark deadline of August 29, 2008**. (You may also deliver your completed proposal to Horizons' office by **5:00 p.m.** that same day.) Send your completed proposal to:

Jewelle Gomez
Director of Grants and Community Initiatives
Horizons Foundation
870 Market Street, Suite 728
San Francisco, CA 94102

In the interest of fairness, we regret that proposals dated after the postmark deadline or sent by fax at any time cannot be considered. If you have any questions about the proposal process, please feel free to contact Jewelle Gomez, Director of Grants and Community Initiatives, at jgomez@horizonsfoundation.org or 415.398.2333 x116.

Guidelines for the Updated Budget Worksheets

Please note that Horizons Foundation has changed our budget worksheets for Community Issues grants to give the review panel a broader financial snapshot of your organization.

If you have additional information that will help clarify any of your figures, please include a separate sheet with budget notes numbered to correspond to the item on the budget you're discussing.

Organizational Financial Worksheet

As in past years, both LGBT-primary and non-LGBT-primary organizations should fill out the organizational financial worksheet. **However, arts applicants that are not independent organizations (such as film projects) do not have to fill out an organizational financial worksheet.**

We have condensed some lines, but the new worksheet asks for essentially the same information as before. The more significant change is that we have expanded the scope of information we're requesting so that the review panel is better informed.

About the "Fiscal Periods"

For the Fiscal Period, please indicate whether your financial information is based on a calendar year (January to December) or a fiscal year with a different beginning and ending month.

Enter the appropriate fiscal year in the three columns of budget figures.

- The first column is for your last *closed* fiscal year. For example, if your fiscal year is based on a calendar year, you would enter "2007" here. If your last closed fiscal year is July 2006 through June 2007, you would enter "2006" here.
- The second column is for your *current* fiscal year. If your fiscal year is based on a calendar year, you would enter "2008" here. If your current fiscal year runs July 2008 through June 2009, you would enter "2008" here.
- The third column is your **projection** for your *next* fiscal year. Please base your projections on normal expectations grounded in past years, or indicate if there is some unusual activity expected (such as anniversary celebrations or a special project). Again, we understand that the third column is a projection.
- Budget notes numbered to correspond with the budget line can be used to explain significant changes or unusual fiscal activity.

If you have a fiscal sponsor, the fiscal information provided should relate to your organization, NOT your fiscal sponsor.

Project Budget

Only the following organizations need to fill out the project budget:

- A non-LGBT-primary organization
- An LGBT-primary organization asking for project support only
- Arts applicants that are not independent organizations (such as film projects)

1a. Organization Summary

Organization Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____ Web: _____

Executive Director: _____

Phone: _____ Email: _____

Grant Proposal Contact (if different from above):

Name: _____ Title: _____

Phone: _____ Email: _____

Is your organization an IRS 501(c)(3) nonprofit? Yes No EIN#: _____

If no, please fill out the Fiscal Agent information:

Fiscal Agent Organization Name: _____ EIN#: _____

Contact Name: _____ Title: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____ Web: _____

Organization Mission (**50 words or less**; for arts projects, describe the filmmaker/theater group/artist/etc.):

Total 2008 Organizational Budget (do not include the budget of your fiscal sponsor, if any): _____

of Staff: _____ # of Volunteers: _____ 1st Year of Service: _____

of People Organization Serves Yearly: _____

Is your organization: LGBT Primary? Yes No People of Color Organization? Yes No

1b. Request Summary

Organization Name: _____

Project Name (if different from organization name): _____

Amount Requested: \$ _____ Organization/Project Budget: \$ _____

Priority area for which funds are being requested (you may check more than one):

- Policy/Advocacy/Systems Change Securing LGBT Equality Racial Equity
 Increasing Giving * LBT Health and Empowerment Other
 Leadership Development LGBT Aging

* This priority area applies to LGBT organizations with budgets over \$1 million. No other organizations may apply under this priority.

Will grant funds be used for general operating costs? Yes No

If no, please describe the project for which you are requesting funds in 50 words or less (this is the contract language we will use in your grant agreement if your proposal is funded):

Populations Served by Program/Organization:

Brief description of the specific population targeted (if any) by the organization/program for which funding is sought (age, gender, ethnicity, etc.) *(for arts projects, describe the audience for the project)*:

Number of people to be served by the organization or project for which funding is sought *(for film/theater/arts projects, describe potential venues for the work if not specific numbers)*: _____

1c. Diversity Summary

Organization Name: _____

Please fill out all percentages to the best of your ability. *If you are an LGBT-specific organization seeking general operating support, skip column D.*

Check here if the data has not changed significantly from your last CI proposal. You may leave the rest of the page blank.

	A) Board		B) Staff		C) Populations served by your agency (%)	D) Populations to be served by project to be funded (%)
	#	%	#	%		
RACE/ETHNICITY						
African American/Black						
Asian/Pacific Islander						
Hispanic/Latino						
White (Non-Hispanic)						
Native American						
Multi/Biracial						
Other: _____						
GENDER						
Female						
Male						
Intersex						
Transgender						
Other: _____						
SEXUAL ORIENTATION						
Gay						
Lesbian						
Bisexual						
Heterosexual						
Other: _____						
AGES						
0-12						
13-18						
19-24						
25-39						
40-54						
55+						

GEOGRAPHIC AREAS SERVED	C) Populations served by your agency (%)	D) Populations to be served by project to be funded (%)
Bay Area		
California outside the Bay Area		
State or local outside California		
National		
International		
OVERALL TOTAL (should add to 100%)		
Your work within the Bay Area:		
Alameda		
Contra Costa		
Marin		
Napa		
San Francisco		
San Mateo		
Santa Clara		
Solano		
Sonoma		
BAY AREA TOTAL (should add to 100%)		

2. Proposal Narrative

Your narrative should be **no more than three pages** (using at least 12-point font). Shorter narratives are welcome. On each page of your proposal, please include the organization name, contact name, and contact information.

Please address the following areas in this narrative:

1. Briefly describe the organization's mission, goals, history, work, and impact.
2. Where applicable, describe how your organization/project addresses one or more of the foundation's priorities.
3. Describe who and how many people will be served by your organization and your organization's qualifications to serve them.
4. *If you are a non-LGBT-primary organization or an LGBT-primary organization applying for support of a specific project,* please describe the project that you plan to implement, including the goals, activities, and strategies you will use to achieve those goals.
5. Describe the anticipated impact this funding will have on your organization or project and how you will evaluate your organization's successes and/or challenges.
6. Include the three most compelling reasons for Horizons Foundation to award a Community Issues grant to your organization.
7. **For arts projects only (film/theater/literature/visual, etc.):** Describe the content and style of the project, cultural/artistic context, how it addresses the subject matter, how the project was developed, who the audience might be, past attendance figures, and who is involved in developing/creating the work.

3. Update on 2007 Funding

If your organization received a Community Issues grant last year, please provide an update. Please include the organization name, contact name, and contact information.

Use no more than a single page.

As applicable, please briefly describe the impact that the grant has had and your progress against any objectives laid out in your grant. Also tell us how successful your activities have been to date; how you made that assessment; and whether you expect your achievements to differ from the goals you set out in your 2007 proposal. Finally, please describe any major organizational and/or programmatic changes you have experienced (or expect) during the grant period.

4a. Organizational Financial Information Worksheet

Organization Name: _____

Organization's Annual Budget: _____ Fiscal Year Period: _____ (month) to _____ (month)

Do not fill in lines that are not relevant to your organization. Individual film projects may skip this page and use the Project Budget Worksheet.

Where necessary, please attach a separate sheet with budget notes, numbered to correspond with the items below. For example, please explain any figures that are not self-explanatory, any significant increase/decrease from one year to the next, the nature of in-kind contributions, or pending grant proposals. Please explain your plans for any decrease in Net Assets (deficit).

REVENUE:

Please do not include in-kind support here but list in a budget note.

	200__ (last closed FY)	200__ (current FY)	200__ (projected FY)
1. Foundations			
2. Corporations			
3. Individual donors			
4. Government			
5. Earned revenue (sale of tickets, products)			
6. Fundraising activities			
7. Contracted services			
8. Other: _____ (please itemize in the budget notes)			
TOTAL REVENUE			

EXPENSES:

	200__ (last closed FY)	200__ (current FY)	200__ (projected FY)
9. Salaries and wages (includes benefits, taxes, etc.)			
10. Consultants and professional fees			
11. Operational costs (includes rent, utilities, and accounting/ audits)			
12. Program costs (all)			
13. Marketing and promotion			
14. Fundraising activities			
15. Other: _____ (please itemize in the budget notes)			
TOTAL EXPENSES			

CHANGE IN NET ASSETS:

	200__ (last closed FY)	200__ (current FY)	200__ (projected FY)
15. Current period increase or decrease in Net Assets <i>This is the difference between your total revenue and total expenses.</i>			
16. Accumulated increase or decrease in Net Assets at year end. <i>This amount usually carries over from one year to the next unless explained.</i>			

4b. Project Budget Worksheet

Organization Name: _____

Project Start Date: _____ End Date: _____

Do not fill in lines that are not relevant to your project. This page is to be used primarily by non-LGBT organizations, film projects, and organizations **not** requesting general operating support.

If necessary, please attach a separate sheet with budget notes, numbered to correspond with the items below. For example, please explain any figures that are not self-explanatory, any significant increase/decrease from one year to the next, the nature of in-kind contributions, pending grant proposals, or other specifics that might help the panel review your proposal.

REVENUE:

Please do not include in-kind support here but list in a budget note.

	Amount
1. Foundations	
2. Corporations	
3. Individual donors	
4. Government	
5. Earned revenue (sale of tickets, products)	
6. Fundraising activities	
7. Contracted services	
8. Other: _____ (please itemize in the budget notes)	
TOTAL PROJECT REVENUE	

EXPENSES:

Put an asterisk by any items to be paid specifically from a Horizons Foundation grant.

	Amount
9. Salaries and wages (includes benefits, taxes, etc.)	
8. Consultants and professional fees	
9. Operational costs (includes rent, utilities, supplies)	
10. Travel	
11. Equipment	
12. Printing/copying	
13. Marketing and promotion	
14. Fundraising expenses	
15. Other: _____ (please specify in the budget notes)	
TOTAL PROJECT EXPENSES	

16. PROJECT NET (Total Revenue minus Total Expenses) \$ _____

If the expenses for this project are greater than the revenue, please describe in the budget notes how you plan to address the deficit.

5. Certification of Non-Discrimination

As part of Horizons Foundation's due diligence commitments to individual donors, donor advisors, philanthropic partners, and Horizons' own mission to serve the lesbian, gay, bisexual, and transgender community, we require grantees to complete this form for the foundation, where it is kept on file.

Please check as appropriate:

_____ I certify that _____ *[organization name]* does not discriminate in regard to race, color, religion, age, sex, gender identity, sexual orientation, marital status, physical disability, political affiliation, veteran's status, national origin, ancestry, socio-economic status, or source of income in its employment practices, selection of board members, selection of students, or in accepting clients for its services or products or as otherwise provided by all applicable federal, state, and local laws.

Organization: _____

Signature of Authorized Officer: _____ **Date:** _____

Name and Title: _____

Fiscal Agent Organization (if applicable): _____

Signature of Fiscal Agent (if applicable): _____ **Date:** _____

Name and Title: _____

Grant Proposal Checklist

This checklist is provided to help you ensure that your proposal is complete. **PLEASE DO NOT INCLUDE THE CHECKLIST WITH YOUR PROPOSAL.** It is for your convenience only.

We regret that incomplete proposals cannot be considered. Send your completed proposal, including all required attachments, to Horizons Foundation by **August 29, 2008 (postmarked or delivered by 5:00 p.m.)**.

All applicants must submit a total of five copies of the proposal (each set stapled once in the upper left corner): one single-sided original and four DOUBLE-SIDED copies. (The IRS statement and financial statements need not be double-sided.) Please assemble your proposal in the following order:

- ___ **1a. Organization Summary**
- ___ **1b. Request Summary**
- ___ **1c. Diversity Summary** (just mark the check box if the information has not changed significantly)
- ___ **2. Proposal Narrative** (no more than three pages, minimum 12-point font)
- ___ **3. Update on 2007 Funding** (if applicable)
- ___ **4a. Organization Financial Information Worksheet** – Required for proposals from both LGBT- and non-LGBT-primary organizations. However, this is **not** required for art applicants that are not independent organizations (for example, film projects). Also note that this is **not** the budget for your fiscal sponsor (if applicable).
- ___ **4b. Project Budget** – Required for proposals from non-LGBT-primary organizations, LGBT-primary organizations requesting project support only, and arts applicants that are not independent organizations.
- ___ **5. Certification of Non-Discrimination** (be sure to sign the form)
- ___ **6. List of board members** for your organization (not your fiscal sponsor), including their affiliations
- ___ **7. IRS 501(c)(3) determination letter** confirming tax-exempt status for your organization or fiscal sponsor. One copy is sufficient.
- ___ **8. Audited financial statement** for your most recent fiscal year (or full financial statement or Form 990, if you do not have an audited statement). One copy is sufficient.
- ___ **9. Sample work (arts projects only)**

Written works: Include samples under 10 pages (typewritten and double-sided) with the five copies of your proposal, or four bound books.

DVDs: Clearly indicate your sample section; one copy is sufficient.

VHS: Cue the tape to a 10-minute selection; one copy is sufficient.

We do not accept slides.

DELIVERY: Mail or deliver your completed proposal with this form and all required attachments to:

Jewelle Gomez
Director of Grants and Community Initiatives
Horizons Foundation
870 Market Street, Suite 728
San Francisco, CA 94102