

CHARITY PARTNERS OF AUSTIN

2007-2008 SEASON INVESTMENT CYCLE GUIDELINES

Established in 2005, Charity Partners of Austin (CPA) was founded with the mission to support Nonprofits in the greater Austin area through the production of musical & artistic events, and to provide the highest quality entertainment experience for both performers and their audience. The members of CPA coordinate the production, underwriting, and marketing of several events per year, with all net proceeds donated to other 501(c3) organizations on a grant basis. Please see our website at (www.charitypartnersofaustin.org) for more information about CPA.

THE CPA GRANT PROCESS

CPA's grant process is simple – we produce fundraising events, and distribute net proceeds to nonprofits that apply and are chosen for grants.

- Grant requests submitted by nonprofits are reviewed by a Grants Committee. Requests are ranked using an objective evaluation and ratings process, which may include a site visit and interview by a CPA representative.
- During each annual fundraising season we will produce a series of events, initially targeting two major seasonal events and 5 or more additional events. All net proceeds from these events are awarded as grants to nonprofit recipients. Grant recipients participate in the publicity and production of the event they are chosen for.
- Events are continually scheduled during the course of the season. Grant recipients are not chosen in conjunction with a specific event until the event has been formally scheduled.
- Therefore, while grants may be submitted to CPA at any time during the course of the season, the request may not be processed until an upcoming event has been scheduled.
- Grant requests are maintained on file for the entire fundraising season. Nonprofits that are eligible but not chosen for an event may resubmit a new request for the following season.

In our 2005-2006 season that ends in April, we have raised approximately \$100K and distributed all of it via grants ranging from \$1,000 to \$15,000. Our goal in the 2006-2007 season is to raise approximately \$125,000.

GRANT FOCUS AREA

CPA's goal is to maintain a grant process that is professional and objective, but does not create a major administrative burden for applicants and recipients.

Before submitting your application, please confirm that you meet at least two of the three top criteria for CPA grant decisions:

1. Services: Does your organization provide health, education, or welfare services primarily for low-income kids and families in the Greater Austin area?
2. Financial Stability: Does more than 60% of your revenue come from earned income vs. donations or grants?
3. Culture/Arts appreciation: Does your organization provide opportunities for cultural diversity and/or appreciation of music and the arts?

Other key CPA areas of consideration:

Use of Funds: Grant requests for a specific and measurable project, vs. general operations. All grant funds received should be used within one year from receipt.

Organization leadership: Organizations that are leaders in their area of service, with strong Staff and Board of Directors management.

Organization size: Stable, growing organizations in the range of \$750-\$1.5M in revenues. Smaller groups who may be in 'startup' mode, or larger organizations that are already well funded will not rank as highly.

Event partnerships: Grant recipients are able and willing to be passionate and motivated partners in participating in our events!

Types of Programs We Will Not Consider: CPA will not award grants for the following:

- Nonprofits who do not support clientele in Greater Austin - Travis, Hays, Bastrop or Williamson counties
- General operating expenses not tied to a specific, measurable project
- Debt reduction
- Endowments or memorials
- Bridge funding or interim financing
- Partisan, political lobbying or legislative activities
- General fund drives or annual appeals
- Fraternal, sectarian and religious organizations where the grant is intended for the principal benefit of the organization's own members or adherents, or where the grant is intended for inherently religious activities
- Private foundations
- Legal expenses incurred in any action by or against the organization
- General construction or renovation (unrelated to a specific proposed project or program)
- General capital campaigns (unrelated to a specific proposed project or program)
- Fundraising activities or events, or advertising
- Sports teams or any sports-related activity or competition

Our guidelines are continuing to evolve, and CPA reserves the right to change its criteria without prior notice at any time.

As part of our grant awards process, CPA will require that the grant recipient submit periodic progress reports. CPA emphasizes the use of evaluation to measure program progress and outcomes, promote learning from experience, improve program performance, and encourage our grantees to build effective self-evaluation plans into their projects.

APPLICATION PROCEDURES

Please submit your application to the CPA Grant Investment Committee. Email method is preferred. However, grants may be submitted through U.S. Postal Service.

Please email application information to aluecke@sbcglobal.net.

If sending via U.S. Postal Service, submit two un-stapled copies to:

Charity Partners of Austin
Attn: Grants Investment Committee
4606 Laurel Canyon Dr
Austin, TX 78731

All applications will be acknowledged in writing within two weeks of their receipt.

Application elements must include the following:

1. Completed **Charity Partners of Austin 2006-2007 Season Grant Request Form** (*page 3*) as your cover page
2. **Narrative**, *not to exceed 2 pages in length*, that includes the following:
 1. Brief summary of the organization's mission, history and programs;
 2. Description of the specific project for that you are seeking a grant from CPA. Include key project components, evidence of urgent community need or specific demand for the project, and an explanation for why your organization is most qualified to meet this need/demand. Please also include a detailed budget for the project that outlines specific elements of project spend.
 3. How will the results of this project be measured? Specifically, what performance targets are you committed to achieving and over what time period? Please state in terms of specific benefits and observable changes for your clients.
3. Copy of organization's 501(c3) IRS exemption letter or that of your financial sponsor (e.g. an Austin Community Foundation type of entity.)
4. Copy of financial statements for *last three years*, preferably professionally audited.

**Charity Partners of Austin
Grant Request Form**

2006-2007 Season

(Please type or print clearly)

Organization: _____ Website: _____

Primary Contact (Name & Title): _____ Email: _____

Address: _____ Phone: _____

_____ Fax: _____

1. Do you have your 501(c3) status? **YES NO** 2. Year organization founded: _____

3. Number of employees: Full-Time _____ Part-Time _____ Volunteers _____

4. Number of clients served annually: 2003 _____ 2004 _____ 2005 _____

5. Total revenues in fiscal years: 2003 _____ 2004 _____ 2005 _____

6. Have you applied to CPA in the past? **YES NO**

8. Describe your geographic service area: _____

9. Describe your target population (i.e. who you aim to serve): _____

10. What other non-profit organizations in the Austin area provide similar types of services? _____

11. Briefly describe your organization's use of performance metrics: _____

11. Amount of grant request: _____

PROJECT BUDGET *(continue on back as needed)*

Line Item / Category	Total Project Expense	CPA Grant
Total		

12. How do you plan to finance the rest of the project expense? How much of the additional revenue needed has already been raised?

Before submitting your proposal, please review the list of questions above and also use the following checklist to ensure you are ready to proceed.

- We have included a copy of financial statements for *last three years*, preferably professionally audited with a certificate or letter of status.
- We are a 501(c3) non-profit organization and have included IRS certification for us or our sponsoring organization.
- We have identified a program or project clearly within CPA's eligibility guidelines:
 - targets a defined population;
 - for a defined duration;
 - with defined, measurable goals;
 - in Travis, Hays, Bastrop and/or Williamson counties;
 - will use the full amount of CPA's grant; and
 - will expend the funds within 12 months
- We have provided an answer to all questions that will be asked
- We have clearly stated what we will do, how and why
- We have selected the focus area under that the proposal will be considered
- We have approval from our Executive Director and/or Board President to pursue this funding