San Antonio Area Foundation
Where Giving and Community Connect

2020 Community Information Session
Housekeeping

Please mute yourself

Enter questions in chat box

Recording available within one week
Meeting Objectives

• Welcome & Meet the CEI Team
• Our Continued Journey
• 2020 Process
  § Eligibility & Application
  § Other upcoming processes
• Q & A
Meet the CEI Team

Patricia Mejia
Vice President

Jessica Urias
Grant Assistant

Catherine Garcia
Grants Manager

H. B. Cavalcanti
Director of Research and Evaluation

Stephanie LaFroscia
Senior Program Officer

Gavin Nichols
Senior Program Officer

Jennifer Cook
Senior Program Officer

Cadence Corbin
Program Officer

Jane Paccione
SALSA Managing Director
Our Continued Journey

Building Trust through Transparency
CEI Strategic Planning Process

Early 2017
Initial contract with FSG was signed for strategic planning.

Mid 2017
FSG & the Area Foundation engaged in focus groups and one on one meetings with over 70 community members & stakeholders.

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.

Early 2019
CEI team signs new contract with FSG specifically for our grantmaking processes. We enter a transition year for grantmaking.

Mid 2017
New Impact Areas
Equity lens and launch of our 4 new impact areas for grantmaking; alignment of nonprofit capacity-building to grantmaking

Initial contract with FSG was signed for strategic planning.

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

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

Equity lens and launch of our 4 new impact areas for grantmaking; alignment of nonprofit capacity-building to grantmaking
North Star: San Antonio area residents are deeply connected, have equitable opportunities to thrive, and contribute to the vitality of the community.
What is Equity?

**Definition**: 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

- Donor Advised
- Annual Responsive Process
- Scholarships
- Agency
- Designated
- Corporate Advised
- Beneficial Interests
Intentional process to identify opportunities

Impact Areas

Internal
- Existing experience/capacity
- Convening Power/Credibility

External
- Growing Momentum
- Donor Alignment

Donor Alignment

Growing Momentum

Impact Areas
10 practices moving the San Antonio Area Foundation towards more equitable grantmaking

**ANNOUNCEMENT**
- Conduct community information sessions on and off campus
- Cultivate deeper relationships with nonprofit leaders in the four impact areas

**APPLICATION**
- Bring application and scoring matrix into alignment with impact area strategies and commitment to equity
- Provide targeted TA to strengthen applications and build capacity of historically underfunded organizations

**REVIEW AND DECISIONS**
- Set goals for ideal composition of the grant portfolio and assess organizations in tiers based on budget size
- Establish processes for transparent & diverse CACs, with strong expertise in each area

**GRANTEE EXPERIENCE**
- Develop PO / partner relationship to problem solve and adapt to shifting context
- Be prepared to provide rigorous and specific comments to any applicant; solicit feedback from applicants to improve the process

**CEI TEAM**
- Support PO’s to develop domain expertise and engage in professional development around equity considerations on assigned impact areas
- Determine timeline and budget for the grant cycle of each impact area and adjust over time as needed
2019 Snapshot = 98 grantees received $3 million in grants

Budgets Large and Small

- 39% $40K-$74.9K (10%)
- 29% $75K-$249.9K (22%)
- 22% $250K-$999.9K (29%)
- 22% $1M+ (39%)

Reaching New Applicants

- 1st Time Awardee: No application in 5 yrs 12%
- 1st Time Awardee: Returning applicant 17%
- Previous Recipient 71%
Serving areas with the greatest need

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
Our 2020 Annual Responsive Process

Building Trust through Transparency
## Setting Vision: Four impact areas with an integrated equity lens

<table>
<thead>
<tr>
<th>Impact Area</th>
<th>Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural Vibrancy</td>
<td>A vibrant arts and culture community that increases connectivity, empowers all San Antonians, and reflects the cultural diversity of San Antonio</td>
</tr>
<tr>
<td>Youth Success</td>
<td>A supportive network of programs in San Antonio that supports the improved educational and social-emotional success and autonomy of young people and elevates the achievement of all within the community</td>
</tr>
<tr>
<td>Successful Aging</td>
<td>An attractive and livable San Antonio that supports the improved health, well-being, and autonomy of older adults and values the contributions of all older adults within the community</td>
</tr>
<tr>
<td>Livable and Resilient Communities</td>
<td>A thriving, connected and resilient San Antonio where residents can enjoy a safe, stable, life of opportunity in every zip code</td>
</tr>
</tbody>
</table>
2020 Cycle Two Process

Successful Aging: Support organizations and programs that address the needs of aging adults and their caretakers; recognize their ongoing contributions to diverse communities across the San Antonio area; provide opportunities to engage and connect; and build awareness of and collaboration between existing resources.

Livable and Resilient Communities: Support organizations, programs and initiatives that further access to affordable, safe, and stable housing, transportation; access to health and wellness resources; public spaces; support public-private partnerships to create sustainable opportunities and address disparities in these areas across the San Antonio area; and provide platforms for community/stakeholder voice and leadership.
**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.

Investment in Equity

- 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
2020 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

<table>
<thead>
<tr>
<th>Budget Size</th>
<th>Grant Award</th>
</tr>
</thead>
<tbody>
<tr>
<td>$40,000 - $74,999</td>
<td>$8,000</td>
</tr>
<tr>
<td>$75,000 - $249,999</td>
<td>$15,000</td>
</tr>
<tr>
<td>$250,000 - $999,999</td>
<td>$25,000</td>
</tr>
<tr>
<td>$1,000,000 +</td>
<td>$50,000</td>
</tr>
</tbody>
</table>
2020 Process: Reminders!

• We will be available to assist you up until 4 PM on Tuesday, June 30.

• You will have until Tuesday, June 30th 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!
2020 Annual Responsive Grantmaking – Two Cycles

Cycle 1 – Spring; Cultural Vibrancy & Youth Success
• Feb. - Nonprofit Information Sessions
• Feb. 27 - Application Opens
• May 3 - Application Closes
• Aug. - Final Notifications

Cycle 2 – Fall; Successful Aging & Livable & Resilient Communities
• May - Nonprofit Information Sessions
• May 18 - Application Opens
• Jun. 30 - Application Closes
• Oct. - Final Notifications
Connecting with our team

- Cadence Corbin, Program Officer- Successful Aging
  ccorbin@saafdn.org, (210) 242.4721

- Stephanie LaFroscia, Senior Program Officer- Cultural Vibrancy
  slafroscia@saafdn.org, (210) 228.3754

- Gavin Nichols, Senior Program Officer- Youth Success
  gnichols@saafdn.org, (210) 242.4720

- Jennifer Cook, Senior Program Officer- Livable and Resilient
  jcook@saafdn.org, (210) 228.3753

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