



CITY OF EAST PALO ALTO

**TRANSIENT OCCUPANCY TAX
(TOT)**

**GRANT PROGRAM
2019 MANDATORY SMALL
GRANTS ORIENTATION**

AGENDA

WELCOME & INTRO

Q&A/LOGISTICS

ELIGIBILITY

CITY OF EAST PALO ALTO (EPA) GRANTS PROGRAM AVAILABLE FUNDING

- Transient Occupancy Tax (TOT) Grant

FUNDING GUIDELINES

- Policies, Priorities, and Limits
- The Fine Print

INSURANCE REQUIREMENTS

- Types & Additional Requirements

EVALUATION

- What Makes a Great Program?
- Community Grants Review Panel (CGRP)
- Reporting: Closeout, Survey

APPLICATION/DISTRIBUTION OF RFA

- Supporting Documents
- Due Date/Time
- How/Where to Submit

OTHER FUNDING OPPORTUNITIES

CONTACT INFO

QUESTIONNAIRE/QUESTIONS

CLOSING/THANK YOU

WELCOME & INTRODUCTIONS

WELCOME TO THE CITY OF EAST PALO ALTO'S GRANTS ORIENTATION

- KARLA M. PRINCE-CHENG, Ed.D., M.S.Ed., Administrative
Grants Coordinator
- REPORT TO MARIE MCKENZIE, Administrative Services
Director
- MEET & GREET

Q&A LOGISTICS

FAIR ACCESS TO INFORMATION

QUESTION CARDS

- Distribute/Collect during presentation
- Place cards in the black tray for later review

SURVEYS

- Place surveys in the black tray after completed

FOLLOW-UP QUESTIONS

- Email: kprince@cityofepa.org by Tuesday, March 5, 2019, 5:00 pm. Responses will be posted to the City's website – “Apply for a Grant” page – by Friday, March 9, 2019.

ELIGIBILITY REQUIREMENTS (MANDATORY)

- 501 (c)(3) ◦
- HOLD A CURRENT BUSINESS LICENSE WITH THE CITY OF EAST PALO ALTO IF BASED IN EAST PALO ALTO.
- PROGRAM MUST BE LOCATED IN AND/OR DEMONSTRATE SERVICES TO RESIDENTS OF EAST PALO ALTO.
- PROPOSED PROGRAM MUST SUPPORT THE FUND'S PRIORITY STRATEGIC FOCUS.

AVAILABLE FUNDING

TOT

- TRANSIENT OCCUPANCY TAX (TOT)
- INITIATED IN 1998, AMMENDED 2002
- FUNDED BY THE FOUR SEASONS HOTEL TAX
- NO SUNSET
- FUNDS DISTRIBUTED TO DATE: \$1.5 MILLION
- GRANT YEAR: 2019
- MAXIMUM ALLOCATION: \$150,000
- INDIVIDUAL GRANT: UP TO \$16,000
- PURPOSE: THE TOT TAX PROVIDES A DEDICATED REVENUE STREAM WITH AN EMPHASIS ON SUMMER PROGRAMMING.
- STRATEGIC FOCUS: YOUTH, or FAMILIES, and/or SENIORS in the East Palo Alto Community

FUNDING GUIDELINES

POLICY GUIDELINES

CITY OF EAST PALO ALTO GRANT FUNDS ARE FLEXIBLE AND CAN SUPPORT A WIDE ARRAY OF PROGRAM COSTS THAT ARE IN LINE WITH THE PROPOSED PROGRAM. REALISTIC BUDGETS THAT ADEQUATELY ACCOUNT FOR TRUE COSTS AND THE ASPECTS OF SERVICE THAT ARE KEY TO PROGRAM QUALITY ARE ENCOURAGED.

FUNDING GUIDELINES CONT...

General Guidelines/Priorities:

- The focus of grant requests must be on direct service to target populations
- Administrative fees cannot exceed 30% of the budget request
- Capital items (real or rental) must be for the primary and direct use by target populations
- Property rental must provide space directly needed for programs funded by the grant
- Food costs must be directly related to the direct service to target populations
- All expenditures must be supported with proper documentation such as receipts or invoices
- Applications and proposals must be complete and received on time

Specific Restrictions/Limits:

- Depreciation on buildings or equipment
- Maintenance (Ex: Hot water heater service), utilities (Ex: PG&E, etc.), or facility improvements (Ex: Roof repairs)
- International travel
- Religious worship, instruction, or proselytization
- Activities prohibited by law

For a complete list please visit: www.cityofepa.org

FUNDING GUIDELINES CONT...

THE FINE PRINT

- CONTRACTURAL REQUIREMENTS:

You **MUST** sign a Grant Agreement and **MUST** provide proof of Insurance **PRIOR** to receiving your first payment

- FUNDING METHODS:

After all contractual documents are submitted, reviewed, and approved, only then will your grant award will be processed. Payments are distributed via postal mail only

INSURANCE REQUIREMENTS

I TYPES OF INSURANCE

- A. Commercial General & Automobile Liability (\$1,000,000.00) per occurrence
- B. Worker's Compensation and Employer's Liability Insurance – complete waiver if no employees. (\$1,000,000.00) per occurrence
- C. Abuse & Molestation Liability Insurance – if clientele are youth/seniors. (\$1,000,000.00) per occurrence

II ADDITIONAL REQUIREMENTS

- A. Broader Insurance Coverage – may be satisfied by a combination of primary & umbrella or excess insurance

ENDORSEMENTS

- B. Additional Insured Status – for Commercial General Liability AND Automobile Liability
- C. Primary & Non-Contributory Coverage – for Commercial General Liability AND Automobile Liability



EVALUATION

WHAT MAKES A GREAT PROGRAM?

- SERVES THE TARGET AUDIENCE
- USES BEST PRACTICES
- EMBRACES INNOVATION, EXPANDS OPPORTUNITY, LEVERAGES RELATIONSHIPS/FUNDING SOURCES
- HAS CAPACITY
- IS MEASURABLE/HAS IMPACT
- OFFERS BANG-FOR-THE-BUCK, REALISTIC BUDGET
- STRIVES FOR LASTING CHANGE OR BENEFITS

EVALUATION CONT...

COMMUNITY GRANTS REVIEW PANEL (CGRP)



TOT

FOUR SEASONS (F)
SMALL BUSINESS (R)
LARGE BUSINESS (NR)
RESIDENT
INDUSTRY EXPERT (R/F)



MEASURE C

MCOC MEMBER (R/F)
SMALL BUSINESS (NR)
LARGE BUSINESS (R)
RESIDENT
INDUSTRY EXPERT (R/F)



EVALUATION CONT...

REPORTING

- Close Out – final narrative, receipts/invoices, budgets, surveys, pictures, demographics, in addition to financial statements, and any other documents related to your program
- Survey – What are you using to get feedback from your clients? And are you using that data to inform future decisions about the direction of your organization? Are those decisions tied to evidence-based practices? Submit and use survey included in your Closeout Report OR use your own survey

HOW TO APPLY – Distribute RFA

APPLICATION

APPLICATION ELEMENTS: The 5 W's

- Who?
- What?
- When?
- Where?
- Why?
- Checklist

APPLICATION CONT...

(Checklist)

SUPPORTING DOCUMENTS:

- Narrative, Work Plan/SOW, Budget; Max, 30% Administrative, 70% direct services-no indirect costs, Logic Model
- **COMPLIANCE:**
- Conflict of Interest (COI)
- Memorandum of Understanding (MOU) – if applicable
- **IRS DOCUMENTS:**
- Last two years filed Tax Returns Form 990 OR 990 Exemption
- 501(c)(3) determination letter or Copy of fiscal agent's 501(c)(3) determination letter

FINANCIALS:

- Organization's annual budget covering 2 years
- Current year-to-date Financial Statements
- Previous Year's Financial Statements
- Matching Funds commitment letter if applicable
- **OTHER:**
- Organizational Chart: the chart should include the primary applicants Board of Directors, the entire project team (all partners), and illustrate the relationship between the partners.
- List of Board Members including titles and addresses
- Name of Executive Director or equivalent employee



APPLICATION CONT...

ONLY ELECTRONIC APPLICATIONS IN PORTABLE DOCUMENT FORMAT (PDF FORM) WILL BE ACCEPTED.

EMAIL TO: kprince@cityofepa.org
DROP BOX TO: kprince@cityofepa.org

**DEADLINE, FRIDAY MARCH 29, 2019 @ 5:00PM
LATE APPLICATIONS WILL NOT BE ACCEPTED.**

OTHER FUNDING OPPORTUNITIES

the David & Lucile Packard FOUNDATION



philanthropic ventures foundation

KORET FOUNDATION



CONTACT INFORMATION

**Karla M. Prince-Cheng, Ed. D., M.S.Ed.,
Administrative Grants Coordinator**

City of East Palo Alto

City Hall

2415 University Avenue, Second Floor.

East Palo Alto, CA 94303

TEL: (650) 853-3132

FAX: (650) 853-3115

EMAIL: kprince@cityofepa.org

QUESTIONNAIRE TOT SMALL GRANTS 02/28/19

Presentation/Information/ Materials	Strongly Agree	Agree	Unsure	Disagree	Strongly Disagree
Was the presenter's voice clear and audible?					
Was the agenda followed?					
Was the presenter informative and on task?					
Was the presenter able to answer questions ?					
Was the time used efficiently?					
Was the information easy to comprehend?					
Did you learn all that you needed to know regarding the grants program?					
Do you feel confident about this grant process?					
After today, will it be easy for you to locate additional information ?					

Please write additional feedback below. Thank you!

What would you identify as the strength of this orientation? _____

What would you like to see included in future orientations? _____

Any additional comments/statements/suggestions? _____

CLOSING

THANK YOU!

