



GRANTS TO
GREEN

Orientation 2009



Background



- Seeks to transform the nonprofit sector in the Atlanta region by encouraging them to build green
- The intent is to encourage nonprofits to renovate, expand, or construct sustainable buildings.
- Our definition of “green”
A green or environmentally sustainable building is a building, which in its design, construction, and operation, makes a minimal draw on non-renewable resources and gives high priority to respecting the physical environment.

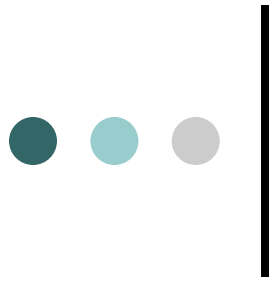


Partnership



- Supported by the Kendeda Fund
- Partnership between:
 - The Community Foundation for Greater Atlanta
 - Southface





Southface



- Southface promotes sustainable homes, workplaces and communities through education, research, advocacy and technical assistance.
- Programs:
 - Residential Green Building Services
 - EarthCraft Communities
 - Commercial Green Building Services
 - GA Weatherization Program



The Community Foundation



Mission

The Community Foundation for Greater Atlanta strengthens our region by providing quality services to donors and innovative leadership on community issues.



The Community Foundation



Philanthropic Framework

Our Philanthropic Framework explains how we intend to have a greater impact on communities in our region. By connecting donors, nonprofits, community leaders and others, we will continue to address community needs through philanthropy.

www.cfgreateratlanta.org



What to Expect Fall 2009

- Accepting a Letter of Intent (LOI) for Assessment awards and Implementation grants
- LOI deadline is Monday, October 26 at 5PM
- An average of 12-15 Assessment awards per cycle
- \$500,000 available for Implementation funding per cycle



Eligibility Requirements



- Nonprofits must:
 1. Be classified by the U.S. Internal Revenue Service as a nonprofit, tax-exempt organization and the IRS determination must be current;
 2. Be registered and in good standing with the Georgia Secretary of State's Office as a nonprofit;
 3. *Must have a minimum two-year operating history after receiving its 501(c)(3) classification;
 4. Have at least one full-time paid employee (paid minimum wage of at least *\$15,080 annually or more, working 2,080 hours or more) for at least 12 months prior to submitting a Letter of Intent (*please note that contractors or consultants do not count toward this requirement*);



Eligibility Requirements



- Nonprofits must:
 5. Have an annual organization budget of \$250,000 or more;
 6. Have a current written strategic plan or business plan for the whole organization that covers three or more years that includes measurable goals and methods to assess effectiveness;
 7. Own or Lease the buildings the nonprofit occupies and is requesting support for, must have five or more years remaining on current lease(s);
 8. Have control over the entire building's electricity and water use systems in order for recommendations to be fully implemented and tracked;



Eligibility Requirements



- Nonprofits must:

9. Provide 12 months of utility bills/statements for existing buildings or an energy model for new construction. This is requested after award of Assessment or Implementation funding;
10. Complete Implementation projects within 24 months;
11. Have CPA audited financial statements for the past two completed fiscal years (*only required for organizations requesting Implementation grants*);



Eligibility Requirements



○ Nonprofits must:

12. Provide a match to support green changes:

Only required for organizations requesting Implementation Grants

Match (cash or in-kind) can be fulfilled in the following ways:

- By the nonprofit or its donors/funders;
- In-force labor or personnel costs;
- Services donated by a third party

Match rate depends on the organization's budget:

- \$250,000- \$499,999: \$0.50 to \$1
- \$500,000 more: \$1 to \$1

Match amount is based on the project budget and not the organization budget



Eligibility Requirements



o Match Example

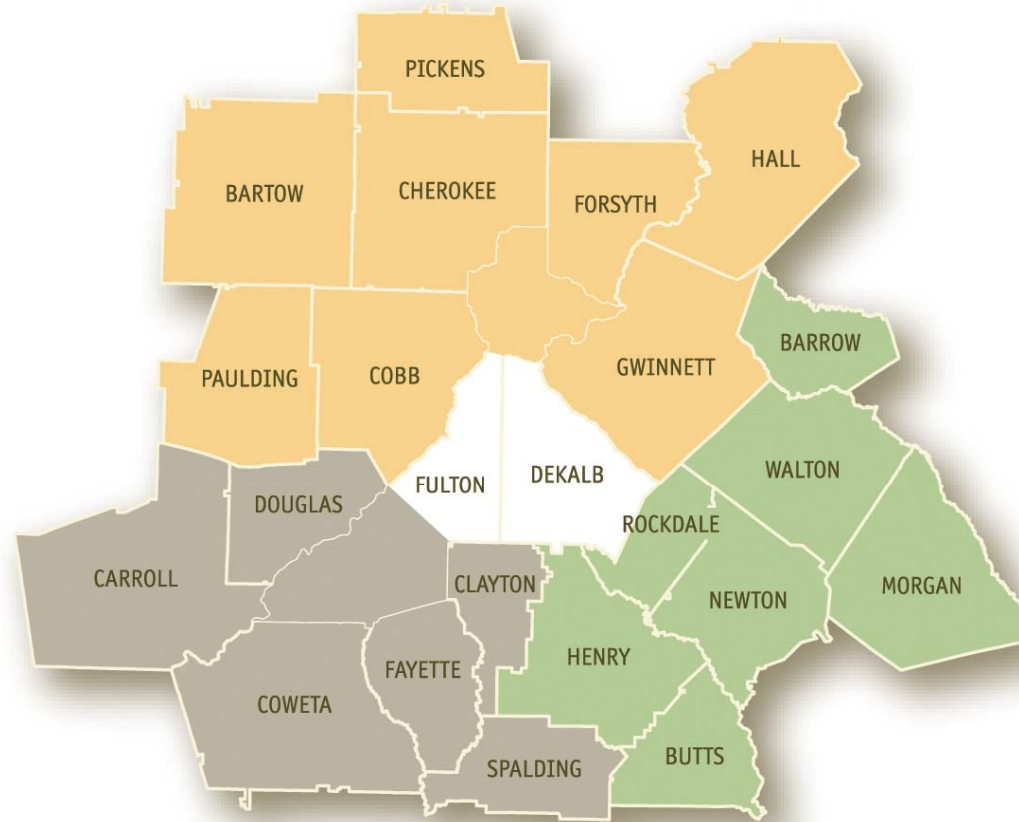
Org Budget	\$501,000	Therefore match rate is \$1:\$1
Project Budget	\$30,000	Therefore match amount has to be \$15,000 or more
Org Match	\$15,000 or more (cash or in-kind)	(Project Budget – Org Match = Funding Request Amount)
Funding Request	\$15,000 or less	(Funding Req + Org Match = Project Budget)

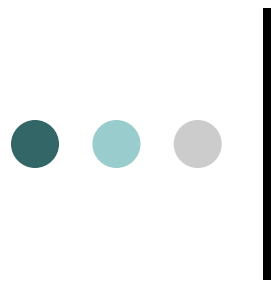


Eligibility Requirements



13. Apply for grants to improve properties located in The Community Foundation's 23-county service area only





Not Eligible



- A nonprofit operated by a religious organization is eligible to apply only if it serves secular needs and has space formally dedicated to its programs. Projects of a religious nature or that require participation in a religious activity as a condition for receiving services are not eligible.
- Visit www.gipl.org to learn more about a similar program for religious organizations- Georgia Interfaith Power & Light Energy Improvement Grant Program



Former Grantees



- Are former Grants to Green grantees eligible to apply again?
 - Former Assessment award recipients are eligible to apply for an Implementation Grant once the Assessment report has been completed.
 - Former Assessment award recipients may apply for another Assessment for a different building if substantial progress has been made to implement recommendations from the previous Assessment.
 - Former Implementation grant recipients must wait one year after close-out of the Implementation grant in order to apply for another Implementation grant and/or Assessment, even if it is for a different building.



Evaluation Expectations



Grantees will be expected to:

- Work with Grants to Green evaluation team 2-3 times over the course of the grant period
- Implementation grantees are required to participate in a monitoring site visit within 6-12 months of the grant period
- Complete baseline, quarterly and end-of-grant reports
- Track savings through Skye Energy



Application & Grant Process



1. Review the Program Guidelines and Sample Assessment
2. Complete one of two Letter of Intent forms:
 - Assessment LOI
 - Implementation LOI
3. Submit the LOI electronically
4. Selected organizations will be invited to submit a full application
5. The selected nonprofits return a complete application.
6. Assessment applicants are notified if they have been selected or if their application has been declined



Application & Grant Process



7. Assessment grantees receive Assessments
8. Implementation applicants will be notified if they have been selected for a site visit or if the application has been declined
9. Site visits are conducted for selected Implementation applicants
10. Implementation grantees receive funding, others are declined
11. Grantees are evaluated until the end of the grant period
12. Green Champion attend convenings



Fall/Winter Cycle Dates



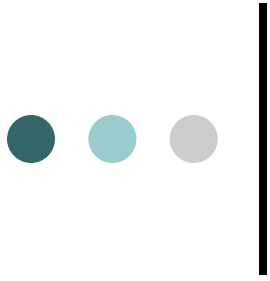
Schedule

October 26, 2009	Deadline for Letter of Intent for Assessments and Implementation
November 9, 2009	Notification of declination or invitation to submit application
November 30, 2009	Final Assessment and Implementation Applications due (invitation only)
December 2009	Assessments awarded
Jan 11 – Jan 15, 2010	Site Visits for Implementation Applicants only (Mon- Fri, 9am- 5pm)
February 2010	Implementation Grants Awarded

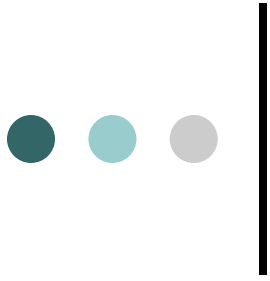


What does Grants to Green Support?

- Nonprofits can apply for an:
 1. Assessment Award
 - Energy & Water Use Assessment
or
 - Green Building Design Review
 - In addition to one Other Green Operation Service
 2. Implementation Grant
 - Retrofits: renovations and expansions to existing buildings
or
 - New green construction



Questions?



Assessments



Assessment Award



- Not a cash grant, but a service performed for the nonprofit
- Environmental experts and engineers examine the organization's building, energy, and water systems using equipment and controls and then recommend ways the building could operate more efficiently
- The Assessment is completed within the first two months of the grant period
- The grant period is for 12 months



Types of Assessments

1. Energy and Water Use Assessment for existing buildings are accompanied by recommended upgrades and improvements to the building which are assigned priorities
2. Green Building Design Review for new construction to substantially improve the energy performance, indoor environmental quality, and material used
3. Other Green Operation Services
 - **Charrette:** A Charrette is a collaborative session in which a group of stakeholders and designers identifies common project goals and drafts a design which attempts to meet the goals of all stakeholders. A Charrette may be a good option if your organization is considering:
 - A new construction project
 - A major renovation of an existing building
 - An organization wide sustainability plan

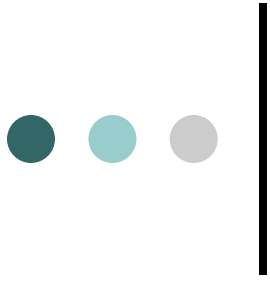


Types of Assessments

3. Other Green Operation Services *Continued*

Greening Operations Analysis:

- **Transportation Analysis:** A Transportation Analysis reviews organization wide travel habits
- **Carbon Footprint Analysis:** A Carbon Footprint is a snapshot of your organization's environmental impact in terms of CO2 emissions
- **Procurement Analysis:** A Procurement Analysis reviews your organization's purchasing habits and identifies opportunities to increase the sustainability of your operations through purchasing environmentally preferred products



Assessment LOI



Assessment LOI



General Contact Information

Organization Name:		
Mailing Address:		
City:	Zip Code:	County: (Choose One)
Organization Leader:		Title:
Phone:	Email:	
Board Chair:	Phone:	Email:
Grant Contact:	Phone:	Email:
Website:	Year Incorporated:	



Assessment LOI



Organization Description

Tax ID:	Organization pays at least one full-time salaried employee? (Choose One)
Does the organization have a current written strategic plan? (Choose One)	
Organization is registered with the Georgia Secretary of State as a nonprofit? (Choose One)	
Counties served by the organization: (Primary County); (Secondary County); (Other Counties)	

Describe the mission and summarize the history of the organization (1,000 characters)

Is the Assessment for 1) new construction or an 2) existing building?
* Does the organization have 12 months of utility data for the existing building(s) requesting support for?
* Does the organization have an energy model of the new construction(s) requesting support for?



Assessment LOI



The Request

What is the opportunity the organization wants to address by having the Assessment completed? (1,000 characters)

How will this Assessment strengthen the organization as a whole and its ability to address broader community needs and opportunities? (1,500 characters)

Other green operation services requests (choose one, if any):

*** What is the opportunity the organization wants to address by having an additional green operation service? (1,000 characters)**



Assessment LOI



Building/ Property Description

How many buildings does the organization operate?	
How many buildings does the organization own?	
How many buildings does the organization lease?	
How many buildings is the organization requesting support for?	
Buildings requesting support for are: Building 1 (Choose One)* Building 2 (Choose One)* Building 3: (Choose One)*	
Building(s) requesting support for: If any are leased, are all lease agreement (s) five years or more? (Choose One)	

* Options are: Own or Lease



Assessment LOI



Financial Snapshot

Financial Snapshot	Current Fiscal Year To Date	Last Fiscal Year End	Two Year Prior Fiscal Year End
Total Budget	\$	\$	\$
Total Revenue	\$	\$	\$
Total Expenses	\$	\$	\$
Surplus/(Deficit)	\$	\$	\$
Net Assets/Fund Balance	N/A	\$	\$
Is the organization currently carrying any debt excluding a mortgage? (loans, accounts payable, lines of credit, etc.):			
If yes, what is the total amount of debt carried? \$			
Date on which applicant's fiscal year ENDS (MM/DD):			



Assessment LOI

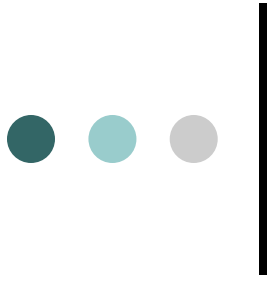


Anything Else? & Authorizing Signatures

Use this space to clarify any of the information provided in this Letter of Intent. *(500 characters)*

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Authorizing signatures: Typing in your name acts as your signature and acknowledges that you have reviewed the guidelines associated with submitting a Letter of Intent to Grants to Green.	
Organization Leader:	Date:
Board Chair:	Date:



Assessment Application



Assessment Application



1.1 Organizational Background

What are the organization's three (3) main activities or programs? *(500 characters for each activity)*

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.
.



Assessment Application



1.2 Characteristics of the Population Served

Provide data on the population served by the organization in the last completed fiscal year.

Numbers are () Actual or () Estimated. Source:

Race/Ethnicity & Gender	Female	%	Male	%	Total	%		Age Groups	#	% of Total
African American or Black								Young Children (0-5)		
Asian or Pacific Islander								Children (6-12)		
Latino								Youth (13-18)		
White								Adults (19-63)		
Other:								Elderly (64+)		
Total						100		Total		100



Assessment Application



1.2 * Characteristics of the Population Served

Geography	Number	%	Geography	Number	%	Geography	Number	%
Barrow			Douglas			Paulding		
Bartow			Fayette			Pickens		
Butts			Forsyth			Rockdale		
Carroll			Fulton			Spalding		
Cherokee			Gwinnett			Walton		
Clayton			Hall			Other county		
Cobb			Henry			Other state		
Coweta			Morgan			No data		
DeKalb			Newton			TOTAL		100



Assessment Application



1.3 How are capital improvements addressed in the organization's current strategic plan?
(1,000 characters)

1.4 Is the organization involved in advocacy activities related to environmental policy? (Choose One)

1.5 Does the organization have in-house policies regarding environmental sustainability? (Choose One)

1.6 Describe any previous experience with environmental sustainability: *(1,000 characters)*

1.7 Explain the organization's most recent experience with a capital improvement project. Include responses to the following: What was the general scope of work? Was the project completed on time? Was the project completed under, on, or over budget? *(1,500 characters)*



Assessment Application



2.0 Property/ Building Description

Please list the property details of the building (s) for which the organization is requesting support.

PROPERTY #1

Property Address:		
City:	Zip Code:	County: (Choose One)
Square footage:	Year Constructed:	Type of facility: (Choose One)*
<p>The building is (check appropriate box and fill in information where necessary):</p> <ul style="list-style-type: none"> A. Owned by the organization with no debt B. Owned by the organization with a debt of \$__ with (#) years remaining on the loan C. Has an option to purchase for a term of (#) months, ending on (M/D/YYYY) D. Is leased from (Company Name). The current lease began on (M/D/YYYY), ends on (M/D/YYYY), and has (#) options to renew. 		
<p>If applicable, does the Board have a plan for eliminating the debt? (Choose One) Please explain.</p>		

* Facility Options: Housing, Office, Parking, Classroom, Other

Describe the project the organization is requesting support for (1,000 characters):



Assessment Application



3.0 Partnership

3.1 * Describe the organization’s external sphere of influence. Describe how the organization develops and maintains partnerships and cooperative relationships with other organizations. (1,000 characters)

3.2 List organizations that the organization will educate and influence to build and/or operate Green. (1,000 characters)

<ul style="list-style-type: none">•	<ul style="list-style-type: none">•
<ul style="list-style-type: none">•	<ul style="list-style-type: none">•
<ul style="list-style-type: none">•	<ul style="list-style-type: none">•



Assessment Application



○ Attachments

- Attach a copy of the Internal Revenue Service's current 501(c)(3) designation letter
 - Provide proof that the organization is registered and in good standing with the Georgia Secretary of State's Office
 - One-page summary of the organization's current strategic plan
 - * Signed and dated deed proving building(s) ownership or lease agreement proving long-term lease for at least 5 years or more
- Letter from the Board of Directors that includes a statement agreeing to allow Southface to present an executive summary of the findings of services to the Board or a relevant Board subcommittee
 - Completed Board Information form
 - Completed Green Champion Information form



Board Information Form

Organization Name:

Current number of board members:	What is the length of a board member's term in years?
Minimum number required by your bylaws:	Number of consecutive terms a board member may serve:
Maximum number allowed by your bylaws:	

Name	Employer	Committee Membership (on your board), Skills & Talents	Total Years on Board to date	Years Left in Term	Race/ Ethnicity	Gender
<i>Example: Jane Chan</i>	<i>Jane Chan, CPA</i>	<i>Board Treasurer; Finance Committee Chair, accounting</i>	<i>5</i>	<i>1</i>	<i>Asian</i>	<i>F</i>
<i>Example: Jamal Smith</i>	<i>Alston & Bird</i>	<i>Fundraising Committee, law, parent of client</i>	<i>2</i>	<i>1</i>	<i>African American</i>	<i>M</i>



Green Champion Form



Green Champion Name:	
Nonprofit Organization:	
Employer (if different from above):	
Title:	

Describe your affiliation with the nonprofit organization receiving the grant (<i>include the number of years of affiliation</i>):
Describe your current and planned involvement with the Grants to Green project:



Green Champion Form



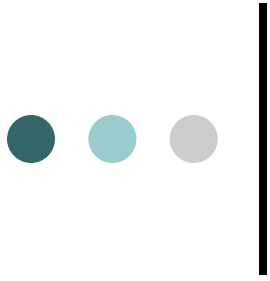
Academic Degree (s):	Degree Level: Concentration:
	Degree Level: Concentration:
Describe your past and current work/professional experience related to environmental sustainability as a volunteer, employer or member of a professional association (include organization name, title and description or duties):	
Name any self identified expertise regarding environmental sustainability:	
Are you willing to train your peers (co-workers and other Green Champions) on subjects regarding environmental sustainability? Yes or No	



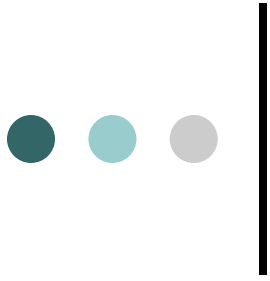
Green Champion Form



Mark your general availability/preference for meetings/convenings. Indicate your selections with an "x":						
Day	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Morning						
Afternoon						
Evening						
Are you willing to host Green Champion meetings/convenings at your location? Yes or No						



Questions?



Implementation



Implementation Grant



- A cash grant to the nonprofit up to \$50,000
- Start with an Energy and Water Use Assessment before applying for an Implementation Grant
- Implementation grants are used to pay for the cost of executing recommendations identified in a recent Assessment
- Implementation grants do not pay for the cost of implementing recommendations made for Other Green Operation Services
- Complete in 24 months
- May employ entities other than Southface (e.g. architectural firms, utility companies, engineers, etc.) to perform assessments at own expense



Recommendation Examples



○ Renovation or Expansion

- HVAC Systems upgrades to higher efficiency units
- Water efficient fixture replacement such as low-flow toilets and faucets
- Lighting upgrades
- Building shell improvements such as air sealing and insulation



Recommendation Examples

○ New Construction

Cost difference between code compliant implementation and green implementation:

- Code compliant equipment and higher Seasonal Energy Efficiency Ratio (*SEER*) or Energy Efficiency Ratio (*EER*) rated HVAC equipment
- Code compliant lighting and higher efficiency lighting
- Code compliant plumbing fixtures and innovative technologies to save water
- Products (*i.e. flooring, cabinets, etc.*) that do not contain local and recycled/rapidly renewable materials content and those that do



Implementation LOI



Assessment Provider Information

Assessment Completed By:		Title:	
Company:			
Mailing Address:			
City:		Zip Code:	County:
Phone:		Email:	
Completion Date:			



Implementation LOI



The Request

What kind of Assessment did the organization have completed?

List what recommendations from the Assessment Report the organization would like to receive funding to implement. (1,000 characters)

Funding request amount: \$

How will this funding strengthen the organization as a whole and its ability to address broader community needs and opportunities? (1,500 characters)



Implementation Application



2.3 Funding Request for EXISTING BUILDINGS

*** What is the organization's rationale for its funding request listed above? (1,000 characters)**



Implementation Application

2.4 Implementation Chart for NEW CONSTRUCTION:

Implementation Chart for NEW CONSTRUCTION: Decide what new construction items the organization would like to have funded and enter the organization's requests on the chart along with the requested details:

Recommendations to be Implemented (Use corresponding number found in Design Review)	*Baseline Code Compliant Cost from Contractor Bid(s) (if available)	*Green Upgrade Cost from Contractor Bid(s) (if available)	Estimated Cost Difference Between Code and Green from Design Review	Funding Request	Match Amount	Match Source	Projected Energy & Water Savings (kwh)	Projected Cost Savings (per year)
	\$	\$	\$	\$	\$			\$
	\$	\$	\$	\$	\$			\$
	\$	\$	\$	\$	\$			\$
	\$	\$	\$	\$	\$			\$
	\$	\$	\$	\$	\$			\$
	\$	\$	\$	\$	\$			\$
	\$	\$	\$	\$	\$			\$
	\$	\$	\$	\$	\$			\$
	\$	\$	\$	\$	\$			\$
	\$	\$	\$	\$	\$			\$
TOTAL	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL			
\$	\$	\$	\$	\$	\$			



Implementation Application



2.5 Funding Request for NEW CONSTRUCTION

*** What is the organization's rationale for its funding request listed above? (1,000 characters)_**



Implementation Application



2.4 Implementation Plan

Explain the organization's plan for implementing recommendation within a 12 to 24 month time period. If implementation is estimated to take longer than 24 months please explain. (1,000 characters)



Implementation Application

- If the organization has been granted a Grants to Green assessment, only attach:
 - A copy of the completed Assessment (s)
 - CPA audited financial statements of the past two (2) completed financials years
 - Most recent financial report as presented to the Board
 - One-page summary of the organization's current strategic plan
 - * Copies of contractor bids (if bid estimates were used)
 - Completed Board Information form
 - Completed Green Champion Information form

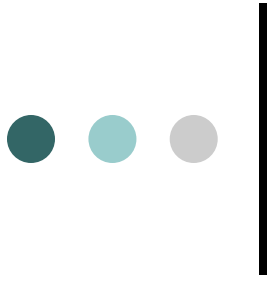


Implementation Application

For all other applicants:

- * Copy of the Internal Revenue Service's current 501(c)(3) designation letter
- * Proof that the organization is registered and in good standing with the Georgia Secretary of State's Office
- CPA audited financial statements of the past two (2) completed fiscal years
- Most recent financial report as presented to the Board
- One-page summary of the organization's current strategic plan
- * Signed and dated deed proving building(s) ownership or lease agreement proving long-term lease for at least 5 years or more
- *Letter from the Board of Directors that includes a statement verifying the entity that performed the assessment presented an executive summary of the findings of services to the Board (*or a relevant Board subcommittee*)
- Copies of contractor bids (if bid estimated were used)
- Completed Board Information form
- Completed Green Champion Information form

*Asked in addition to what is asked of previous Grants to Green Assessment grantees

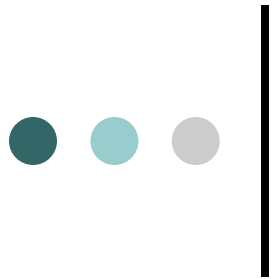


Questions?



Thank you for attending the
Grants to Green Orientation!

Please fill out the
Grants to Green evaluation form
before you exit.



Contacts



- Email

GrantstoGreen@cfgreateratlanta.org

- Websites

www.cfgreateratlanta.org

www.southface.org