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**2020 Application Worksheet (Fiscal Sponsor)**

**CATEGORY: FOCUS**

This worksheet is only a guide to help you prepare to apply. It is not the online application that you need to complete and submit. The following instructions include a reminder about selecting the online application that is appropriate for your organization’s legal status for grant purposes (i.e., Fiscal Sponsor or no Fiscal Sponsor) and the grant category (i.e., Cultivate or Focus), as well as the related URL link.

Please note that Lead grant category applicants – *pre-determined as eligible through the “Letter of Interest” process* - must apply using the Focus grant category application.

**Instructions:** Before proceeding with an online application, please refer to the “Determining Eligibility” and “Resources for Determining Eligibility” sections of the website. Included in the “Resources for Determining Eligibility” section is the “Grantmaking Overview” information packet to help you determine the grant category in which to apply. Once you have determined that the work of the organization is in alignment with the Foundation Priorities as well as the appropriate grant category, collect the information specified in the relevant worksheet.

Be sure to select the appropriate online application link for the grant category in which you apply: Grant Application (no Fiscal Sponsor) – Category: (Cultivate ***or*** Focus); or Grant Application (Fiscal Sponsor) – Category: (Cultivate/ ***or*** Focus).

The staff recommends using an updated version of Internet Explorer, Safari or Firefox browsers. Many users have encountered problems with Google Chrome. If your browser is out-of-date, you may encounter problems with the online application. Here is a link that tells you how to update several browsers: <https://browser-update.org/update.html>.

When you have entered all of the information and are ready to submit your online application, click the ‘Review and Submit’ button at the bottom of the application page. Once you have completed your review and are satisfied with the application, click the ‘Submit’ button. An application that has been submitted can no longer be edited.

If you plan further edits, click the ‘Save and Finish Later’ button. To retrieve an in-progress application, use the link for returning applicants: <https://www.GrantRequest.com/SID_301?SA=AM>. Do not start a new application.

After your application has been successfully submitted to the Foundation, you will receive a confirmation email. The confirmation is sent to the email address of the primary contact.

For more information about the grant process, please refer to the Frequently Asked Questions (FAQ) document. Additionally, the Troubleshooting Guide provides important technical guidance.

**FISCAL SPONSOR ORGANIZATION AND SPONSORED ORGANIZATION OR PROJECT INFORMATION**

Fiscal Sponsor Organization Name **and** Sponsored Organization or Project Name - Write as follows: Fiscal Sponsor Organization Name, fiscal sponsor for Sponsored Organization or Project Name:

Address (use mailing address only) - Fiscal Sponsor Organization address:

City, State, Postal Code:

Organization website - Fiscal Sponsor Organization website:

Tax status - Fiscal Sponsor Organization:

Phone - Fiscal Sponsor Organization:

Fiscal Sponsor Organization’s Annual Budget for Fiscal Year 2019:

Number of Years Sponsored Organization or Project Has Been in Operation:

Sponsored Organization or Project’s Annual Budget for Fiscal Year 2018 (actual):

Sponsored Organization or Project’s Annual Budget for Fiscal Year 2019 (actual):

Sponsored Organization or Project’s Annual Budget for Fiscal Year 2020 (projected if not yet available):

Explain significant (+/- 25%) budgetary variance(s), if any, between the Sponsored Organization or Project's Annual Budgets for Fiscal Years 2018-2020. [50 word limit]

If among the following categories, a category is not applicable, enter the number “0” for that category. Use whole numbers only.

Regarding the Sponsored Organization or Project only:

Number of Board Members or Advisory Group Members:

Number of Full-time Paid Staff:

Number of Part-time Paid Staff:

Number of Full-time Paid Contractors:

Number of Part-time Paid Contractors:

Number of Volunteers:

Sponsored Organization or Project Mission Statement and Current Major Goals [100 word limit]

The current major funders for the Sponsored Organization or Project. [75 word limit] - Do not use special formatting such as bullets.

Did the Sponsored Organization or Project receive McCune Foundation funding in 2017?

Did the Sponsored Organization or Project receive McCune Foundation funding in 2018?

Did the Sponsored Organization or Project receive McCune Foundation funding in 2019?

The Sponsored Organization or Project’s detailed funding history with the McCune Foundation. [75 word limit] - Please list the year and award amount for each grant received. Do not use special formatting such as bullets.

Explain significant changes, if any, the Sponsored Organization or Project has experienced in the past year. [100 word limit] – Because the application already includes fields for explaining significant changes regarding budget and leadership/staff, **please only address significant changes affecting other areas (for example, mission, goals, core programs/services/activities, core communities served/engaged)**.

Please discuss the Sponsored Organization or Project’s leadership structure/staff. Identify the key individuals who carry out the Sponsored Organization or Project’s work, including name, title and role/area of responsibility, as well as whether they are paid full-time or part-time staff or contractor, or volunteer. [150 word limit]

Has there been a change in the Sponsored Organization or Project’s leadership/staff in the past year? If yes, please explain. [50 word limit]

What are the core communities served/engaged by the Sponsored Organization or Project and how does the Sponsored Organization or Project’s leadership/staff reflect these communities? [100 word limit]

**HEAD OF FISCAL SPONSOR ORGANIZATION**

Name:

Title:

Email:

Phone:

**\***Address (use mailing address only):

City, State, Postal Code:

**\***complete this address section only if it is different from the Fiscal Sponsor address you listed under Fiscal Sponsor Organization & Fiscally Sponsored Organization or Project Information

**HEAD OF FISCALLY SPONSORED ORGANIZATION OR PROJECT**

Name:

Title:

Email:

Phone:

Address (use mailing address only):

City, State, Postal Code:

**BOARD OFFICER OR ADVISORY GROUP MEMBER OF FISCALLY SPONSORED ORGANIZATION OR PROJECT** - Although completion of this section is required, if there is no Board or Advisory Group, write "none" or "n/a" in each of the fields. By completing the fields using "none" or "n/a," you are confirming that the Sponsored Organization or Project does not have a Board or Advisory Group.

Name:

Title:

Email:

**REQUEST INFORMATION**

Request Amount:

How would you leverage the Request Amount, that is, how would you use the funding requested to help raise additional resources? At this time, what level of certainty do you have with regard to securing these additional resources (for example, what is already confirmed or what is in the process of being identified)? [150 word limit]

**Sponsored Organization or Project Total Revenue** For each category, using whole numbers only, enter the applicable percentage of the total revenue. The sum of all of the categories must equal 100%.

Earned Income:

Foundation:

Government:

Individual:

Other:

Tell us about the Sponsored Organization or Project’s efforts to sustain and/or grow resources beyond the McCune Foundation funding timeframe (generally, late February 2020 – late February 2021). [100 word limit]

**REQUEST DESCRIPTION**

Request Title [Optional]:

You may leave this blank or include a brief statement (**enclosed in parentheses**) that describes the focus of the General Operating Support, using the following format: General Operating Support (**…**)

Note: General Operating Support is funding that enables an organization to carry out its mission and goals. Following are some examples of what it can be used to underwrite: administrative infrastructure, strategic plan implementation, building or strengthening organizational capacity, maintaining core programs and essential staff.

[15 word limit]

**Socially transformative work is not a solo endeavor. Your responses to Questions 1a, 1b and 1c will help us understand how the Sponsored Organization or Project’s work fits within the broader field it is working to transform.**

1a) Describe the vision for the work, explaining the “big picture” and timeline that frame this vision. Tell us what the Sponsored Organization or Project’s role is within this framework. What are the core strategies for making the biggest difference within the broader field? [200 word limit]

1b) With regard to the upcoming year, what will be implemented? How will this support long-term goals - beyond the McCune Foundation funding timeframe (generally, late February 2020 – late February 2021). [100 word limit]

1c) How will you identify and engage peers and allies that share the vision? [100 word limit]

**The McCune Foundation’s core values support deep engagement with diverse New Mexico communities, both as recipients of services and as collaborators whose voices inform the kinds of services received and how these are provided, including the design, development and implementation of programs and approaches. Your responses to Questions 2a and 2b will help us understand how the Sponsored Organization or Project’s work engages with communities served.**

2a) Specify the communities served and engaged. How will the work benefit them directly? [100 word limit]

2b) How are these communities engaged in determining the needs that are the focus of the work? How are they involved in shaping policies and strategies, and evaluating programs, services and benefits? How does the Sponsored Organization or Project respond to and cultivate leadership within these communities? [100 word limit]

**The McCune Foundation values innovation and risk-taking that develop and support new approaches to the challenges faced by New Mexico communities. Your responses to Questions 3a and 3b will provide your organization or project’s perspective on innovation, risk-taking and challenges.**

3a) How does the Sponsored Organization or Project’s work uniquely challenge conventional approaches and create significant, long-term systemic impact? [150 word limit]

3b) What is innovative about the organization or project and its work? What aspects could serve as a model that is replicable and/or scalable? [100 word limit]

**The McCune Foundation’s core values support collaboration and equitably shared work that favor aligned strategies among groups for building broader effectiveness and impact. Your responses to Questions 4a, 4b and 4c offer us an opportunity to learn more about collaboration strategies.**

4a) Who are the organization’s partnering peers and allies? Among these, which are established relationships? Which are new? How do you communicate or stay informed with regard to each other’s efforts in collaborative work? How does this inform shared organizational strategies around specific work deliverables? [150 word limit]

4b) Please describe the specific shared work goals that form the basis of the collaboration proposed with the partnering peers and allies. Include high-level work tasks and how each partner will contribute staff time or other resources to the work. [100 word limit]

4c) How will the shared work in the coming year *deepen and/or expand* the existing collaboration equitably among the partnering peers and allies identified in Question 4a? Explain how the shared work will expand the capacity of each partner, as well as what the collaborative effort makes possible in the coming year that would otherwise not be achievable. [200 word limit]

Geographical Area Served [The county or counties that are being served. If serving all New Mexico counties, scroll to the bottom of the list and select “Statewide.”]

**EVALUATION**

Briefly explain how the Sponsored Organization or Project evaluates its own work for effectiveness. Include information about the roles and involvement of, for example, board or advisory group, staff, consultants, volunteers, communities engaged/served, and peer organizations with which you work. [100 word limit]

With regard to the shared work proposed (Questions 4a, 4b, 4c), how will successes, failures and lessons learned be tracked and documented among collaborating partners? How will decisions be made to course correct if necessary? [100 word limit]

What measures of collaborative practice have been considered and implemented with the goal of deepening the shared work of your organization or project and its partners? Are there particular lessons learned that will inform your work in the coming year? [100 word limit]

**FOUNDATION PRIORITIES** From the following menu, first select the one Foundation Priority with which the Sponsored Organization or Project’s work most closely aligns. Then, within that one Priority, select any of the leverage points significantly applicable to the work of the organization or project.

* Building Links Between Arts & Community Engagement
	+ Community Engagement
	+ Collaboration & Partnership
	+ Education
	+ Build & Diversify Audiences
* Capacity Building in Non-profit Sector
	+ Expertise & Professional Services
	+ Shared Services & Infrastructure
	+ Leadership Development
	+ Workshops & Training
	+ Fundraising & Development Capacity
* Economic Development & Family Asset Building
	+ Scalable Elements Supported by High-touch Interventions
	+ Innovation in Enterprise Structure
	+ Accessibility of Capital
	+ Financial Capabilities & Economic Engagement
	+ Mortgages & Credit
	+ Savings
* Education Transformation & Early Childhood Development
	+ Early Childhood Development
	+ School Leadership Development
	+ Locally-designed Approaches
	+ Multilingual Educational Opportunities
	+ Reform Infrastructure Development
	+ Afterschool & In-school Supplemental Programs
* Leveraging Opportunities in Health Care
	+ Frontline Health Care Worker Workforce Development
	+ Innovative Approaches to Access
	+ Integrated Approaches to Addressing Social Determinants
* Local Food Industry Development
	+ Market Development
	+ Shared Infrastructure
	+ New Farm/Farmer Development
	+ Nutritional Health Education/Interventions
	+ Policy & Advocacy
* Influencing Urban Planning & Built Environments
	+ Injecting Community Voices into Urban Development
	+ Driving Resource Efficiency in Built Environments
	+ Innovative Strategies for Affordable Housing
* Stewardship of Natural Resources
	+ Engaging Diversity
	+ Successful Alliances & Coalitions
	+ Intersection with Other Funding Priorities
	+ Networking
	+ Communications & Ancillary Support
	+ Fostering Innovation
* Strategies for Rural Development
	+ Economic Development
	+ Educational Advancement
	+ Built Environment

Are there other Foundation Priorities that the work also aligns with? Explain the alignment(s). [100 word limit]