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# **North America Community Relations Local Grants Program**

**Nonprofit Partner Training**



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# Citi Community Relations

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**The work of Citi Community Relations builds upon Citi's 200-year history of service, success, and leadership.**

**Community Relations Employees work across the franchise to leverage Citi's vast array of resources and closely coordinate with the Citi Foundation to make communities better – because we are there.**

**Community Relations partners with approximately 70 national organization and more than 1200 local affiliates and nonprofit organizations.**

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# Objectives

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- **North America Community Grants Program**
- **2009 Citi Foundation Priority Funding Areas**
- **Funding Limitations**
- **Community Reinvestment Act**
- **2009 Application Review/Process**
- **Tips for Success**

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# Citi Foundation

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**The Citi Foundation is committed to enhancing economic opportunities for individuals and families, particularly those in need, in the communities where we work so that they can improve their standard of living.**

**The Citi Foundation fulfills this mission by providing grant support for programs that are aligned with our economic empowerment mission, promote collaboration and effective use of philanthropic resources, engage our employees, and demonstrate impact and positive outcomes.**

**Grant making in the United States and Canada is made possible through the Citi Foundation via the North America Community Grants Program (NACGP).**

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# 2009 Citi Foundation Focus Areas

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- Community Development**
- Financial Education and Asset Building**
- Education (College Access)**
- Microfinance and Microenterprise**
- Small and Growing Businesses**

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# Community Development

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## We would consider programs that:

- Develop or preserve affordable housing for rent or purchase by low- to moderate-income individuals and families;
- Revitalize underserved neighborhoods through the rehabilitation of commercial corridors, brownfield clean-up, or the development of community facilities such as charter schools, community centers or after-school facilities
- Encourage innovations in green housing and facilities development 
- Build the capacity of community development organizations to better serve their communities through management training and technical assistance in program development and implementation, impact measurement, strategic planning, finance and board governance.

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# Financial Education and Asset Building

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**We would consider programs that:**

- Provide personal financial education for youth and/or adults through workshops and/or counseling;**
- Encourage individuals to put their financial knowledge into action by taking advantage of asset building services such as insurance, remittances, savings, matched savings, homeownership, and tax credit programs;
- Increase understanding of the role of financial education in changing financial behaviors and producing positive financial outcomes for participants
- Test and implement innovative approaches to the delivery of financial education that lead to greater impact, scale and cost effectiveness.

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# Education (College Access)

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**We would consider programs that have the following components:**

- Prepare students for post-secondary education and careers by supporting programs that build awareness of post-secondary education opportunities
- Build academic readiness for college level work to increase student success towards earning a degree
- Assist students through the college search, application and financial aid process to increase student enrollment and success in higher education
- Provide financial education to families about saving for college and options for financing a college education

**\*\*College access programs must have measurable outcomes.**




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# Microfinance and Microenterprise

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***Definition: A business with 5 or fewer employees and total assets of up to \$10,000 or annual sales of up to \$100,000.***

**We would consider programs that:**

- Provide access to credit needed to start or grow microenterprises
- Provide entrepreneurship training including business plan development, market development skills, management skills, accessing capital, mentoring, and networking
- Build institutional and management capacity of client focused microfinance institutions (MFIs), intermediary organizations and industry networks
- Test and replicate innovative programs in microfinance and microenterprise development that support green business development and access to green products for low-income individuals. 




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# Small and Growing Businesses

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**Definition: Small and growing businesses are generally defined as enterprises that employ 5 to 100 individuals, generating up to \$1 million in revenues.**

**We would consider programs that:**

- Provide access to finance and technical assistance to small and growing businesses in any sector of the economy
- Help start green businesses that leverage environmental innovations and provide environmental and social benefits 
- Assist existing small businesses to become more sustainable and “go green” because of the economic and environmental benefits 
- Support the greening of supply chains and connect small and growing businesses to these potential market opportunities 

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# Funding Limitations

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**ALL applicants must be 501(c)(3) tax-exemption organizations OR a registered school, university or government entity**

**Types of organizations we do not fund:**

- Private foundations
- Supporting Organization designated as Not Functionally Integrated
- Organizations with an annual budget less than \$100,000
- Religious, veteran or fraternal organizations (unless project benefits the entire community)

**The Citi Foundation does NOT fund:**

- General operating support
- Scholarships or awards for individuals
- Monetary incentives directly to individuals
- Capital or endowment campaigns
- Matched funds
- “Pass-through” funding
- Political causes, campaigns or candidates
- Memorials
- Advertising, special events, dinners, telethons, benefits or fundraising activities

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# Community Reinvestment Act (CRA)

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**Criteria – Nonprofit organizations that serve the following populations or geographies:**

- Low- or moderate-income individuals and households**
- Low- or moderate-income communities or census tracts**
- Government designated revitalization, redevelopment, or empowerment zones**
- Small businesses with revenues less than \$1MM**
- Students in schools where greater than 50 percent of the students qualify for the Federal free or reduced cost lunch program**

**All program applications must be CRA Eligible in 2009**

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# **2009 NACGP APPLICATION**

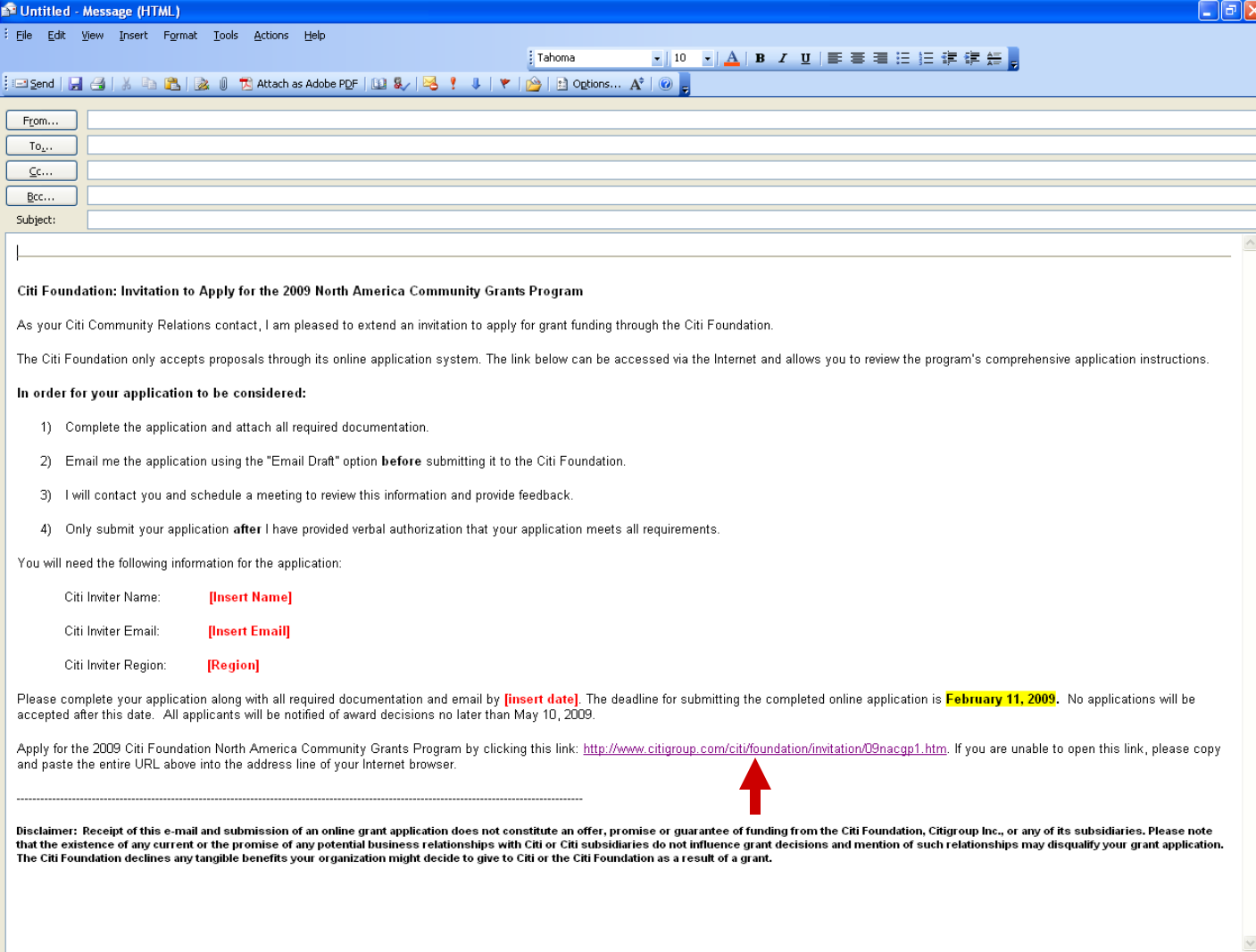
# Invitation to Apply

▪ You will receive an email from your Citi Community Relations Inviter inviting you to complete a 2009 NACGP application for funding consideration

▪ This email will include your Inviter's information, which is requested in the application

▪ It will also contain a due date by which your Inviter wants to receive your completed application (completed NOT submitted)

▪ There is an active link within the email to access the 2009 HTML application



Untitled - Message (HTML)

File Edit View Insert Format Tools Actions Help

Tahoma 10

Send Attach as Adobe PDF Options...

From: [Redacted]  
To: [Redacted]  
Cc: [Redacted]  
Bcc: [Redacted]  
Subject: [Redacted]

**Citi Foundation: Invitation to Apply for the 2009 North America Community Grants Program**

As your Citi Community Relations contact, I am pleased to extend an invitation to apply for grant funding through the Citi Foundation.

The Citi Foundation only accepts proposals through its online application system. The link below can be accessed via the Internet and allows you to review the program's comprehensive application instructions.

**In order for your application to be considered:**

- 1) Complete the application and attach all required documentation.
- 2) Email me the application using the "Email Draft" option **before** submitting it to the Citi Foundation.
- 3) I will contact you and schedule a meeting to review this information and provide feedback.
- 4) Only submit your application **after** I have provided verbal authorization that your application meets all requirements.

You will need the following information for the application:

Citi Inviter Name: [Insert Name]  
Citi Inviter Email: [Insert Email]  
Citi Inviter Region: [Region]

Please complete your application along with all required documentation and email by [insert date]. The deadline for submitting the completed online application is **February 11, 2009**. No applications will be accepted after this date. All applicants will be notified of award decisions no later than May 10, 2009.

Apply for the 2009 Citi Foundation North America Community Grants Program by clicking this link: <http://www.citigroup.com/citi/foundation/invitation09nacgp1.htm>. If you are unable to open this link, please copy and paste the entire URL above into the address line of your Internet browser.

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**Disclaimer:** Receipt of this e-mail and submission of an online grant application does not constitute an offer, promise or guarantee of funding from the Citi Foundation, Citigroup Inc., or any of its subsidiaries. Please note that the existence of any current or the promise of any potential business relationships with Citi or Citi subsidiaries do not influence grant decisions and mention of such relationships may disqualify your grant application. The Citi Foundation declines any tangible benefits your organization might decide to give to Citi or the Citi Foundation as a result of a grant.

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# NACGP HTML Home Page

▪ Please review the guidelines and funding limitations

▪ If you have questions, contact your Community Relations Inviter

The screenshot shows the Citi Foundation website in Internet Explorer 6. The browser title is "Citi - Foundation - Internet Explorer 6". The address bar shows the URL: <http://www.citigroup.com/citi/foundation/invitation/09nacgp1.htm>. The page features the Citi logo and the slogan "Citi never sleeps". The navigation menu includes: Home, About Citi, Investors, Individuals, Businesses, Corporations & Gov't, Institutional Investors, and a "Sign-on to your Account" dropdown. Below the navigation menu, there are links for "Press Room", "How Citi is Organized", "Our Brands", "Global Locations", "Corporate Governance", "Corporate Citizenship", "Careers", and "Citi's History". The main content area is titled "Citi Foundation" and contains a search bar, a link to "Application Help Guide", and the heading "2009 Citi Foundation North America Community Grants Program". Below the heading, it states "Online Application Deadline: February 11, 2009" and includes a note: "Please note: Your Citi Community Relations Contact must review this application BEFORE it is submitted to the Citi Foundation." The text describes the Citi Foundation's mission and lists priority focus areas: "Microfinance and Microenterprise" and "Small and Growing Businesses".

**2009 Citi Foundation North America Community Grants Program**

Online Application Deadline: February 11, 2009

**Please note: Your Citi Community Relations Contact must review this application BEFORE it is submitted to the Citi Foundation.**

The Citi Foundation is committed to enhancing economic opportunities for individuals and families, particularly those in need, in the communities where we work so that they can improve their standard of living.

We fulfill this mission by providing grant support for programs that are aligned with our economic empowerment mission, promote collaboration and effective use of philanthropic resources, engage our employees, and demonstrate impact and positive outcomes. We are particularly interested in supporting program innovations in the following priority focus areas:

**Microfinance and Microenterprise**

Microfinance and microenterprise development are recognized for their effective roles as instruments of change, empowering individuals to become economically self-sufficient through self-employment. Accordingly, the Citi Foundation supports programs that help launch and grow micro-businesses and increase self-employment opportunities for low-income populations. Additionally, the Citi Foundation is interested in efforts that help microfinance institutions achieve scale and long-term sustainability. The Citi Foundation's support of this priority includes programs that:

- Provide access to credit needed to start or grow microenterprises;
- Provide entrepreneurship training including business plan development, market development skills, management skills, accessing capital, mentoring, and networking;
- Build institutional and management capacity of microfinance institutions (MFIs), intermediary organizations and industry networks.

**Small and Growing Businesses**

Small businesses are a powerful and necessary driver of economic growth and job creation and the Citi Foundation supports the growth of these enterprises by funding access to technical assistance and investment capital. However, capital and technical assistance are not enough to guarantee success. These small enterprises must also focus on addressing such issues as environmental sustainability, growing resource scarcity, changing business practice standards, and shifting regulations if they are going to succeed in a rapidly changing global economy. Accordingly, the Citi Foundation is also focused on efforts to help small and growing businesses respond to changing realities in the marketplace and adopt new models for achieving financial and environmental sustainability. The Foundation is particularly interested in activities that support green enterprise development that generates "triple bottom-line" economic, environmental and social benefits. The Citi Foundation's

# Application Instructions

- Carefully review the instructions for applying for a grant application
- Here you will find the links to the required templates for the Detailed Project Budget and the Board of Directors
- You can access the link to the Fiscal Sponsorship Agreement here (if applicable)

**Your Citi Community Relations Contact must review this application and provide verbal authorization BEFORE you can submit the application for consideration to the Citi Foundation.**

**How to Apply and Submit Your Online Grant**

- To start a new online application, click on the appropriate **box** at the bottom of this page to initiate the online application.
  - If your organization is a 501 (c)(3), please click on the box on the left for 501 (c)(3) organizations. You will be required to enter your organization's valid Federal Tax ID Number (Employer Identification Number) so please have this number on hand. One source for this number is your organization's 501 (c)(3) letter issued by the Internal Revenue Service.
  - If your organization is not a 501 (c)(3), please click on the box for schools or religious organizations on the right.
- You will be required to sign in once you click on the appropriate box to start the application.
  - If you previously submitted an online application with the Citi Foundation, you may use the same login e-mail and password.
  - If you are a new applicant, you will need to create an account.
  - A link to your account and log on information will be sent to your e-mail address once an account has been created.
- Once you have signed in, you will be required to complete an eligibility quiz. If it is determined that you are ineligible to apply, please contact your Citi Community Relations Contact.
- Once you are in the application, you will be asked to include your Citi Community Relations Contact's name, e-mail address, and region, provided to you in the e-mail invitation to Apply. Please be sure to enter this information exactly as it appears in the e-mail you received. A list of the regions is available by clicking [here](#).
- You are **REQUIRED to attach electronic copies of the following documents to your application:**
  - Project Budget:** Using the **REQUIRED** template. [Click here](#) to download the template.
  - List of Current Board of Directors and Organization's Senior Staff:** Using the **REQUIRED** template. [Click here](#) to download the template.
  - Organization's Most Recent Audited Financial Statements:** Two years of comparative financials are preferred.
  - Copy of Cancelled Check or Verification of a Depository Account:** Please scan a copy of a voided or cancelled check from your organization's checking account or a verification letter confirming your depository account information. The account name that appears on the check should be your organization's legal name and the routing and account numbers on the check should match the information you will provide in the first page of the online application.
  - Group Exemption** (if applicable): If your organization falls under the group exemption, please attach a scanned copy of the page from the most recent directory, published or online database, which identifies your organization as an affiliate.
  - Public School** (if applicable): If your organization is a public school or school district, please locate your organization on one of the following Web sites – <http://nces.ed.gov/globallocator/>, <http://nces.ed.gov/cd/districtsearch/> – and attach a scanned copy of the print out.
  - Fiscal Sponsorship Agreement** (if applicable) [Click here](#) to download the guidelines.
- You will not be able to submit your application until you have attached these documents to the online application.
- Forward your completed application including required documentation via the "Email Draft" option to your Citi Community Relations Contact for review and feedback.
- After reviewing your application with your Citi Community Relations Contact and receiving verbal authorization to submit your application, check the final verification box in the application.
- Confirm that all required documentation is attached.
- Hit "Review and Submit". Review your application and print a copy for your records.
- Submit your application.
- Within 24 hours, the person who submitted the online application will receive an automatic e-mail response confirming the submission of your application. The e-mail will contain a full copy of your submitted application. **Receipt of this e-mail confirms that your application has been submitted to the Citi Foundation; however, we may still contact you for additional information.**
- Please note that the Citi Foundation conducts a thorough review of all grants and it may take several months to process your grant. To receive a status update on your grant application, please contact the Citi Community Relations Contact who invited your organization to apply.

**Additional Information**

**PLEASE NOTE:** The online grant application will time out after 30 minutes of inactivity. If you need to finish your application at a later time, please select the "Save and Finish Later" button at the bottom of every page of the application. You can access your account again at the following Web address using your account login and password: [https://www.GrantRequest.com/SID\\_584](https://www.GrantRequest.com/SID_584)

If you require any non-technical assistance with the application, please contact your Citi Community Relations Contact.  
Your e-mail invitation lists your Citi Community Relations Contact's information.



# Select Your Organization Type

- Select the box that applies to your type of nonprofit organization:

- 501(c)3 organization
- Public charities, school, religious institutions without a 501(c)3 designation

The screenshot shows the Citi Foundation's online application process. The browser window is titled "Citi - Foundation - Internet Explorer 6". The address bar shows the URL: <http://www.citigroup.com/citi/foundation/invitation/09nacgp1.htm>. The main content area contains a list of instructions for submitting an application, including steps for attaching documents, forwarding the application, and receiving a response. Below the instructions, there is a section titled "Additional Information" with a "PLEASE NOTE" about the application timeout. Two buttons are presented for selection: "All 501(c)3 organizations: CLICK HERE" and "All public charities, schools and religious institutions without 501(c)3: CLICK HERE". Red arrows point to these buttons. At the bottom of the page, there is a footer with the Citi logo, the text "Citigroup.com is the global source of information about and access to financial services provided by the Citi family of companies. Copyright © 2008 Citigroup Inc.", and a taskbar at the very bottom showing the Windows Start button and several open applications.

# Create Account/Account Login

- You are required to create an account before you enter the application
- If you are a new applicant, select the first option and create a password
- If you are a returning online applicant, enter your previously created password
- Click “Continue”

The screenshot shows the Citi Foundation Account Login page in Internet Explorer 6. The browser window title is "Account Login - Internet Explorer 6". The address bar shows the URL: [https://www.grantrequest.com/SID\\_584/Default.asp?CT=CT&SA](https://www.grantrequest.com/SID_584/Default.asp?CT=CT&SA). The page content includes the Citi Foundation logo and the heading "Account Login". Below the heading, there is a "Please Sign In" section with the following form elements:

- E-mail Address:
- I am a new online applicant
- I am a returning online applicant.
- My password is:
- 
- [Forgot your password? Click here](#)

The Windows taskbar at the bottom shows the Start button, several open applications (Microsoft Office, App Training Docs, Microsoft Power..., Internet Explorer, Document1 - Mic...), and the system tray with a 96% battery level and the time 2:26 PM.

# Eligibility Quiz

- First, you will need to complete an eligibility quiz
- If you complete the quiz correctly, you will enter the application
- If you do not complete the quiz correctly, you will be directed back to your Community Relations Inviter

The screenshot shows a web browser window titled "2009 Citi Foundation North America Community Grants Program Application - Internet Explorer 6". The address bar shows the URL "https://www.grantrequest.com/SID\_584/Default.asp". The page content includes the Citi logo and the title "2009 Citi Foundation North America Community Grants Program Application". Below the title is a navigation menu with "Exit", "Help", and "Contact Us". The main heading is "Eligibility Quiz". The quiz consists of seven questions, each with a dropdown menu for the answer:

- Is your organization designated as a private foundation by the IRS?  
No
- Does your organization have an annual operating budget of at least \$100,000?  
Yes
- Does your organization have audited financial statements from the current or previous year (please note that accountant's reviews and non-audited compilations are not acceptable)?  
Yes
- Is your request for general operating support?  
No
- Is your request less than \$10,000?  
No
- Is your request for a capital or endowment campaign?  
No
- Is your request for matched funds or "pass through" funds?  
No

The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the time 4:05 PM and 96% battery level.

# NACGP Application Home Page

The screenshot shows a web browser window titled "2009 Citi Foundation North America Community Grants Program Application - Internet Explorer 6". The address bar displays "https://www.grantrequest.com/SID\_584/Default.asp". The page content includes the Citi Foundation logo and the title "2009 Citi Foundation North America Community Grants Program Application". Navigation links include "Exit", "Help", and "Contact Us". A status bar indicates "Required before final submit" and provides page navigation (Page 1-9) and links for "Review My Application", "Printer Friendly Version", and "Email Draft". A section titled "GENERAL INFORMATION" contains a red warning message: "You and your Citi Community Relations Contact MUST review this application together BEFORE it can be officially submitted to the Citi Foundation. Your Citi Community Relations Contact will determine your eligibility to be invited to submit an official online application to the Citi Foundation. Please email this completed application along with all required documents, by clicking on Email Draft in the top right hand corner, to your Citi Community Relations Contact before the application deadline to allow time for feedback and to make recommended changes." Below this is a red "DEADLINE: FEBRUARY 11, 2008". The form includes three dropdown menus for "Form ID", "Fund", and "Program", each with a "<Select One>" option. The "Organization's General Information" section shows "Organization's Tax ID#" as 133781879, "Organization Name" as "Citigroup Foundation", and "Organization Legal Name" as "Citigroup Foundation". The Windows taskbar at the bottom shows the start button, several open applications, and the system clock at 4:04 PM on 2/11/2008.

2009 Citi Foundation North America Community Grants Program Application - Internet Explorer 6

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit Discuss Research Messenger

Address [https://www.grantrequest.com/SID\\_584/Default.asp](https://www.grantrequest.com/SID_584/Default.asp) Go Links

Citi Foundation

**2009 Citi Foundation North America Community Grants Program Application**

Exit Help Contact Us

\* Required before final submit Page 1 2 3 4 5 6 7 8 9 [Review My Application](#) [Printer Friendly Version](#) [Email Draft](#)

**GENERAL INFORMATION**

You and your Citi Community Relations Contact MUST review this application together BEFORE it can be officially submitted to the Citi Foundation. Your Citi Community Relations Contact will determine your eligibility to be invited to submit an official online application to the Citi Foundation. Please email this completed application along with all required documents, by clicking on Email Draft in the top right hand corner, to your Citi Community Relations Contact before the application deadline to allow time for feedback and to make recommended changes.

**DEADLINE: FEBRUARY 11, 2008**

\* Form ID  
<Select One>

\* Fund  
<Select One>

\* Program  
<Select One>

Organization's General Information

\* Organization's Tax ID#  
133781879

\* Organization Name  
Citigroup Foundation

\* Organization Legal Name  
Citigroup Foundation

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# Application Overview

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- **Organization's General Information**
- **Proposal Section**
- **Audited Financials – Synopsis**
- **Supporting Information**
  - Focus Area
  - MSA/County
  - Demographics
  - Citi Financial Education Curriculum
  - Citi Contact Information
- **REQUIRED DOCUMENTATION**

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# General Information

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- **Organization Name/Address**
- **Contact Names/Emails**
- **Bank Information**
- **Mission and Goals**
- **Previous Funding**
- **Organization's Operating Budget**

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# Proposal Section

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- **Project/Program Title**
- **Project/Program Summary Statement**
- **Statement of Need**
  - a) What are the issues that support the need for this project/program?
  - b) How are those issues impacting low- to moderate-income individuals or small business owners?
  - c) How will this project/program address those issues?
- **Project/Program Plan**
  - a) Detailed description of the overall Project/Program activities
  - b) Specifics on how Citi Foundation funds will be spent
  - c) Number of workshops/sessions, topics, who will facilitate, and anticipated number served during each session

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# Proposal Section – Continued

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- **Anticipated Project/Program Results**
- **Number Served by Project/Program**
- **Project/Program Timeline**
- **Overall Project/Program Budget**
- **Amount Requested from the Citi Foundation**
- **Contingency Plan**



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# Audited Financial Information

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- For what year is the most recent, completed audit?
- What were revenues reported?
- What were expenses reported?
- What were net assets for your organization?
- What were liabilities for your organization?
- Were there any major issues in the audit?

## ***What we review:***

- *Assets*
- *Revenues and Expenses*
- *Program vs. Management Expenses*
- *Auditor's Notes*

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# Supporting Information

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- Focus Area
- **MSA/County**
- Congressional District
- **Demographic Information**
- **CRA – Eligibility/Percentage**
- Citi Employee Volunteers
- Citi Employee Board Membership
- Citi Financial Education Curriculum

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# Required Documentation

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**The following document must be attached to your grant application in order for it to be considered complete:**

- Detailed Project Budget
- Board of Directors and Top Staff
- Audited Financials – Most Recent
- Voided Check/Deposit Information (EFT)

**If applicable, the following must be attached:**

- Public School/University Scan
- Group Exemption Scan
- Fiscal Sponsor Agreement

# Board of Directors - Example

- Complete each line – all fields
- Do not use “” to infer that the following lines are the same information or address
- Include middle initials, particularly for more common names
- Include all Senior Staff and list their titles
- If your nonprofit has a staff with three or fewer employees, list all staff

Microsoft Excel - 2008bod

File Edit View Insert Format Tools Data Window Help Adobe PDF

Type a question for help

125%

Arial 10

Reply with Changes... End Review...

G42

INSTRUCTIONS: Please enter your nonprofit organization's current Board of Directors list and the names of your Organization's Senior Staff in the form below. **This form must be completed exactly as it appears below;** altering the format may delay consideration of your grant proposal. Once you have entered your board members and senior staff, please save this document in an easily retrievable location, for example, your desktop. You will be required to upload this completed document when submitting your online application. If you require additional lines, please select "Insert-Row" from the menu bar.

	Last Name	First Name	Middle Initial	Board Position	Professional Occupation	Company	Address (Nonprofit's address may be used)			
							Street Address	City	State/Province	Country
10	Evans	David	R.	President	IT professional	Independent	11 Guilford Street	Allston	MA	USA
11	Felton	Bruce	M.	Member		Independent	1305 Commonwealth Ave #17	Allston	MA	USA
12	Karakehian	Jason	S.	Member	Artist	Independent	105 Franklin St	Allston	MA	USA
13	Kim	Hei-Jung		Member	IT professional	Independent	195 Faneuil St	Brighton	MA	USA
14	Lew	Brighton	L.	Member	Toll collector	Mass. Turnpike Authority	19 Commonwealth Terrace	Boston	MA	USA
15	Mejia	Bertha	C.	Clerk	Lab assistant	Boston University	28 Holman St., # 2	Allston	MA	USA
16	Philip	James	R.	Member	Retired accountant	n/a	6 Carol Avenue #8	Brighton	MA	USA
17	Rahman	Ayubur		Member	Senior Health Ins	Boston Public Health Commission	251 Cambridge Street #1	Allston	MA	USA
18	Rhenisch	Lynn	S.	Member	Management consultant	Independent	20A Winship street	Brighton	MA	USA
19	Rubin	Jerome	N.	Member	President and CEO	Jewish Vocational Services	37 Hardwick Street	Brighton	MA	USA
20	Smith	Karen	F.	Member	Health Care administrator	Harvard Pilgrim Health Care	70 Athol Street	Allston	MA	USA
21	Vasiliades	Charlie	E.	Member	Housing subsidy manager	MA Dept of Housing and Community Development	47 Langley Road	Brighton	MA	USA
22	Wetterstrom	Wilma	L.	Member	Archeologist	Harvard University	9 Glenley Terrace	Brighton	MA	USA
23	ORGANIZATION'S SENIOR STAFF									
24	Van Meter	Bob	H.		Executive Director	Allston Brighton CD	320 Washington Street, 3rd FL	Brighton	MA	USA
25	Nsangou	Mary-Helen	N.		Associate Director	Allston Brighton CD	320 Washington Street, 3rd FL	Brighton	MA	USA
26	Hanna Cohen	Wendy	R.		Director of Housing	Allston Brighton CD	320 Washington Street, 3rd FL	Brighton	MA	USA
27	Meiser	Michelle	J.		Director of Asset	Allston Brighton CD	320 Washington Street, 3rd FL	Brighton	MA	USA
28	Chan	Ava	M.		Senior Organizer	Allston Brighton CD	320 Washington Street, 3rd FL	Brighton	MA	USA

Ready

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# Project Budget – Example

- Ensure that you list all expenses even if you are not asking the Citi Foundation to fund that line item
- Include a description for all expense line items
- Insure that the total listed in the Citi Foundation Breakdown column equals the “Amount Requested from Citi Foundation” within the application
- Insure that the total listed in the Total Program Funding column equals the amount listed in “Overall Project Budget” within the application
- List all funders/names and from whom you have already requested funding (others should be listed in the “Contingency Plan” section of the application)

Pre-Development Costs - Microsoft Word

Please provide a **detailed line-item description** of how you intend to use the funding provided by the Citi Foundation and how this compares with the overall funding for this program. Please note that you need to **show the expense breakdown for Citi Foundation** funding **ONLY**, even though other funders may finance this project. If you require additional lines, please select "Insert-Row" from the menu bar. NOTE: This is a required template. Please do not change the format of this document.

Provide a detailed description of Citi Foundation funding and total program funding.

	Description	Citi Foundation Breakdown	Total Program Funding
Expenses:			
Salaries	Project Manager	\$9,000	\$65,000
Rent			
Program Materials			\$10,000
Other 1 (explain)	Architect – Consultant	\$6,000	\$12,000
Other 2 (explain)	Environment Analysis	\$3,000	\$3,000
Other 3 (explain)	Appraisals	\$2,000	\$8,000
Other 4 (explain)	Site Selections		\$10,000
Expenses (Citi Foundation total) The column on the left should match the amount requested from the Citi Foundation. The column on the right should match your total project budget amount.		\$20,000	\$108,000

If other funders will finance this project, please provide their information below

Funder		Amount Requested	Amount Secured
Funder 1	Citi Foundation	\$20,000	-
Funder 2	Strauss Foundation	\$35,000	\$35,000
Funder 3	Johnson Family Foundation	\$20,000	\$20,000
Funder 4	ABC Funding Group	\$10,000	\$10,000
Funder 5	Zeba Foundation	\$20,000	-
<b>Total Project Funding</b>		\$105,000	\$65,000
<b>Total Project Expenses</b>			\$108,000

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# Sharing Your Application

- After completing all required questions and attach your required documents (with the exception of the verification question), you will need to share your application for review with your Community Relations Inviter
- Click the “EMAIL DRAFT” icon and send your completed application to your Community Relations Inviter

2009 Citi Foundation North America Community Grants Program Application - Internet Explorer 6

File Edit View Favorites Tools Help

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Address [https://www.grantrequest.com/SID\\_584/Default.asp](https://www.grantrequest.com/SID_584/Default.asp) Go Links

Citi Foundation

**2009 Citi Foundation North America Community Grants Program Application**

Exit Help Contact Us

\* Required before final submit Page 1 2 3 4 5 6 7 8 9 [Review My Application](#) [Printer Friendly Version](#) [Email Draft](#)

**GENERAL INFORMATION**

You and your Citi Community Relations Contact MUST review this application together BEFORE it can be officially submitted to the Citi Foundation. Your Citi Community Relations Contact will determine your eligibility to be invited to submit an official online application to the Citi Foundation. Please email this completed application along with all required documents, by clicking on Email Draft in the top right hand corner, to your Citi Community Relations Contact before the application deadline to allow time for feedback and to make recommended changes.

**DEADLINE: FEBRUARY 11, 2008**

\* **Form ID**  
<Select One>

\* **Fund**  
<Select One>

\* **Program**  
<Select One>

Organization's General Information

\* **Organization's Tax ID#**  
133781879

\* **Organization Name**  
Citigroup Foundation

\* **Organization Legal Name**

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# Email Draft

- Read carefully, then complete the fields
- Remember to enter your Community Relations Inviter email correctly
- Do NOT change the subject line
- Enter your message
- Select the “Send me a copy” to ensure delivery
- Click “SEND”

**Email Application**

You must complete all of the fields below before emailing your application to the recipient(s). Attachments uploaded to your application will be available for download by the recipient(s) for three months from today. Please remember to click the "Send me a copy" check box below to also receive a copy of your email and application.

Emailing your application does not constitute formal submission of your application to the Citi Foundation. You must review your application with your Citi contact before you formally submit the application to the Citi Foundation. Once you have reviewed the application with your Citi contact and ensured that it is complete and accurate, you must hit the "Review & Submit" button located on the last page of the application to review the application and then hit the "Submit" button in order to formally submit your application to the Citi Foundation.

To confirm that your application has been submitted to the Citi Foundation, please sign in to your account page at [https://www.GrantRequest.com/SID\\_584](https://www.GrantRequest.com/SID_584) and see if the application is listed under the "Submitted" section.

\*Your Name  \*Your Email

\*Recipient Email(s)  To send to multiple email recipients, separate email addresses with commas.

\*Subject DRAFT Application from Citigroup Foundation:

Message

Send me a copy

# Authorization to Submit

- Once your Community Relations Inviter has reviewed your application and authorized you to submit it to the Citi Foundation, check the final verification question.

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Address [https://www.grantrequest.com/SID\\_584/Default.asp](https://www.grantrequest.com/SID_584/Default.asp) Go Links

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**CITI COMMUNITY RELATIONS CONTACT INFORMATION**

\* **Citi Inviter Name:**  
The name of the Citi Community Relations Contact who invited your organization to apply for a grant.

\* **Citi Inviter E-mail:**  
The e-mail of the Citi Community Relations Contact who invited your organization to apply for a grant.

\* **Citi Inviter Region:**  
The national region served by the Citi Community Relations Contact who invited your organization to apply for a grant.  
Please refer to the Invitation to Apply email forwarded by your Contact or click [here](#).  
<None>

**By checking this box, I verify that my Citi Community Relations Contact has reviewed this application and has provided verbal authorization to submit this application for consideration by the Citi Foundation. I understand that submission of an application does not constitute an offer, promise or guarantee of funding from the Citi Foundation, Citigroup Inc., or any of its subsidiaries.**

Save & Finish Later Next



# Submit Application

- On the final page of the application, you will see an option to “Review and Submit” your application.
- Click “ REVIEW & SUBMIT”

2009 Citi Foundation North America Community Grants Program Application - Internet Explorer 6

File Edit View Favorites Tools Help

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Address [https://www.grantrequest.com/SID\\_584/Default.asp](https://www.grantrequest.com/SID_584/Default.asp) Go Links

"Upload" button at the bottom of the page.

When attaching documents, you must select the appropriate Document Title that matches the document that you are attempting to upload.

[Please click here for instructions on how to attach required documents.](#)

**REQUIRED DOCUMENTS:**

- 1) Project Budget: [\(Click here to follow link\)](#)
- 2) Board of Directors and Organization's Senior Staff List: [\(Click here to follow link\)](#)
- 3) Organization's Most Recent Audited Financial Statements: (Two years of comparative financials are preferred.)
- 4) Copy of Cancelled Check or Verification of a Depository Account: Please scan a copy of a voided or cancelled check from your organization's checking account or a verification letter confirming your depository account information. The account name that appears on the check should be your organization's legal name and the routing and account numbers on the check should match the information you will provide in the first page of the online application.
- 5) Group Exemption: (if applicable) If your organization falls under the group exemption, please attach a scanned copy of the page from the most recent directory, published or online database, which identifies your organization as an affiliate.
- 6) Public School: (if applicable) If your organization is a public school or school district, please locate your organization on one of the following Web sites- [Public Schools Search](#), [Public School Districts Search](#), or [Public Colleges and Universities Search](#) and attach a scanned copy of the print out to your application.
- 7) Fiscal Sponsorship Agreement: (if applicable) If your organization is acting as a Fiscal Sponsor of this project/program, please review the fiscal sponsorship guidelines by clicking [here](#) and attach the required documentation.
- 8) Additional Attachment (if applicable)

\*\*\*\* NOTE: You can not submit your application to the Citi Foundation until your Citi Community Relations Contact has authorized your submission. \*\*\*\*

**Upload**  
The maximum size for all attachments combined is 25 MB. Please note that files with certain extensions (such as ".exe", ".com", ".vbs", or ".bat") cannot be uploaded.

Title:

File Name:

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# Application Process – Overview

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- ✓ **Complete proposal with required documentation**
- ✓ Meet **deadlines** set by Inviter
- ✓ **Email** application to Inviter
- ✓ **Review** application with Inviter
- ✓ **Anticipate** feedback and changes from Inviter
- ✓ **Email** revised application
- ✓ Secure **Authorization** to submit application
- ✓ Complete **Verification** question on Page 7
- ✓ Review and **Submit** application to the Citi Foundation
- ✓ Save the e-mail confirming **Receipt** of your application

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# Grant Writing Tips

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- Write the proposal as if the funder does not know your programs
- Answer each part of the question thoroughly
- Be clear, specific, and avoid acronyms
- Use relevant, local data for the statement of need

Helpful Links: [www.census.gov](http://www.census.gov) and [www.fedstats.gov](http://www.fedstats.gov)

- Address anticipated challenges and how these challenges will be overcome
- Identify all resources that are necessary to a program's success
- Check spelling and grammar

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# Next Steps

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- **You will receive an Invitation to Apply following this training**
- **Complete and share your draft application with your Community Relations Inviter before the deadline in the Invitation to Apply**
- **Anticipate working with your Inviter (as necessary) to incorporate changes and recommendation to the application**
- **Submit application prior to April 29<sup>th</sup> deadline**
- **Complete the Nonprofit Training Survey (Week of May 4<sup>th</sup>)**
- **Final dispositions communicated prior to August 2009**

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# Questions?

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**Program/Application Questions** → **Community Relations Inviter**

**Technical Questions** → **[foundationsupport@citi.com](mailto:foundationsupport@citi.com)**  
(Direct links within application)