



# City of Temecula

City Manager's Office  
41000 Main Street • Temecula • California 92590  
TELEPHONE (951) 506-5100

## **COMMUNITY SERVICE FUNDING GRANT PROGRAM POLICY AND APPLICATION**

Each Fiscal Year, the City of Temecula may allocate funds in its Operating Budget for community service program(s) ("Project/Program") within the City of Temecula.

### **PURPOSE**

The purpose of this Policy and Application is to establish processing and evaluation criteria for funding requests received from community-based organizations that provide community service programs to Temecula residents. Each fiscal year, the City of Temecula may allocate funds toward the Community Service Funding Grant Program ("Community Service Funding") to serve as a funding resource to nonprofit organizations that provide programs or services which benefit Temecula residents.

### **GENERAL POLICY**

This policy provides a statement of guidelines and criteria for distributing Community Service Funding grants. Community Service Funding is intended to augment the efforts of nonprofit organizations to benefit residents, neighborhoods and communities in Temecula. It is the City's policy to have a program that can channel requests through an application review, thereby ensuring that all requests are evaluated consistently to enter into agreements for specific measurable services and to ensure that recipients are held accountable for providing the agreed upon services within the specified time frame.

### **FUNDING PHILOSOPHY**

Requests for funding received from organizations will be considered during a specified period. Due to limited resources, not all requests can be funded. It is not the City's intention to fund each request received but rather to evaluate each proposal and provide funding to those organizations which most effectively serve the needs and improves the well-being of the residents of Temecula.

Special consideration is given to proposals that replace or enhance services the City is responsible for providing. The City also puts a higher priority on Projects/Programs that have broad community appeal.

The City Council encourages a goal of self-sufficiency for all local organizations. The City Council supports providing grants to organizations that have demonstrated their effectiveness in raising funds and volunteer services for their programs within the community. The Council discourages an over-reliance on City financial assistance to maintain such programs on an ongoing basis. Therefore, all organizations requesting funds from the City should continue efforts to develop stable private funding sources.

## **ELIGIBILITY**

To be eligible for funding, organizations:

- Must be tax exempt;
- Must be nonprofit (and must be able to provide the 501(c)(3) status form);
- Cannot include salaries as part of their funding request;
- Cannot include scholarships to high school or college students as part of their funding request;
- Cannot include debts as part of their funding request;
- Project/Program must benefit the general community of Temecula residents.

## **GUIDELINES**

By law, all Community Service Funding may only be spent for a public purpose for the City of Temecula and must comply with all applicable laws. The program or service recommended for funding must be a social welfare program which benefits the general community of Temecula residents, including promotion of the City. Funds can only be granted to tax exempt IRS 501(c)(3) corporations. Expenditures which will involve a mass mailing cannot violate the Political Reform Act regulations involving mass mailings. The City Council authorizes the City Manager to make administrative modifications to the Community Service Funding Grant Program and Application to assist with maintaining proper compliance with applicable laws.

There will be no roll-over of the budgeted funds for the Community Service Funding Grant Program (within the City's operating budget) from one fiscal year to another. Any funds that were not allocated to a nonprofit organization by the end of the fiscal year will be returned to the City's General Fund.

The Project/Program should benefit the general community of Temecula residents.

Community Service Funding grant shall not exceed \$5,000 per organization per fiscal year.

## **PROCEDURE**

All eligible entities shall complete an application for Community Service Funding. Any nonprofit agency/organization located or providing services in the City of Temecula may apply for Community Service Funding. The Application must include a full explanation about the proposed use of the money and include a budget of the Project/Program. The Application shall be submitted to the City, who will review the Application for completeness. Applying for funds does not ensure that the request will be granted. Funding for the City's Community Service Funding Grant Program is limited and some applications, while worthy, will not be funded due to the limited resources.

Community Service Funding is limited to organizations that have completed the Internal Revenue Service (IRS) process to become a 501(c)(3), nonprofit organization. Formal nonprofit status must be up-to-date and submitted as requested on the Application. Applicants must be in good standing. Nonprofit organizations may apply for funding only if the Project/Program serves a public purpose and follows the laws governing use of public funds.

The contents of the Application shall (at a minimum) include the following;

- Name of organization;
- Organizational history;
- A description of Project/Program, including a physical address of project/program/event;
- Project/Program benefit;
- Organization objective;
- Project/Program budget;
- Areas served;
- Population served;
- Financial information on the requesting organization;
- Compliance documentation up-to-date for any previous Community Service Funding grants awarded to your organization;
- a signed acknowledgement by the recipient of the what is required of them

Applicants who sign the Application enter into a written agreement with the City that specifies the responsibilities of the organization with respect to the use of the Community Service Funding grant; stipulating that the expenses will be documented and the organization must provide a full accounting of expenditures to substantiate that City funds were spent appropriately. Additional records may be requested by the City to ensure the funds were (or will be) used appropriately. Once approved, the Community Service Funding award will be processed by City staff.

### **COMPLIANCE**

As follow-up to Community Service Funding, each awarded entity shall submit proper back up documentation to substantiate that funds were spent appropriately. This includes invoices/receipts, a narrative that explains each expenditure including how it specifically benefitted Temecula residents, and a schedule of the Project/Program's revenues/expenditures. See **COMPLIANCE REPORT** on Application Pages 5 and 6 for specific requirements.

If funds are not spent in accordance with the approved purpose, the organization will be required to refund the amount of funds. Failure to provide proper documentation may jeopardize any future funding. The City of Temecula reserves the right to conduct an audit and/or require additional back-up information to substantiate how funds received from the City were spent.

### **CRITERIA**

In making funding determinations, the City considers the following criteria:

- A. Is the organization currently nonprofit?
- B. Does the organization provide a service to the overall community of Temecula?
- C. Will the organization use the City of Temecula Community Service Funding Grant for the benefit of the citizens of Temecula?
- D. Is the size and make-up of the organization equipped to provide the Project/Program to the overall community?
- E. What is the public reaction to the group?
- F. Does the organization have a high quality level of fiscal management?
- G. Is the group well organized to ensure longevity in the City of Temecula?

- H. Is there evidence of satisfactory service provided to the City's citizens?
- I. Is the organization free from discrimination based on race, color, creed, nationality, sex, marital status, disability, religion, or political affiliation?
- J. Does the organization require attendance or participation in any political, religious or social activity?
- K. Can the organization provide financial statements (prepared using an appropriate method of accounting) to demonstrate sound financial management?
- L. Can the organization provide a budget demonstrating its cost-effectiveness?
- M. Does the organization make its services available to all?
- N. Does the organization possess ongoing program evaluation tools?

### **TIMELINES FOR COMMUNITY SERVICE FUNDING GRANT**

- **Friday, July 2, 2021** - Applications are available at City Hall and on the City's website at: <http://temeculaca.gov/CommunityServiceFunding>
- **Monday, September 13, 2021** - Deadline for submitting applications.
- **October/November 2021** - Award recipients will be announced.

### **DIRECTIONS**

- A. Detach the Application from the Policy.
- B. Complete the Application, filling in all of the blanks. Secure any attachments with staples or clips.
- C. Do not attach more than is requested.
- D. **Submit the original Application to:**

City of Temecula  
Community Service Funding  
Attn: City Manager's Office  
41000 Main Street  
Temecula, CA 92590

Questions: Stacey.Brown@TemeculaCA.gov (951) 694-6413  
Betsy.Lowrey@TemeculaCA.gov (951) 693-3959

**CITY OF TEMECULA**

**FISCAL YEAR 2021 - 2022  
COMMUNITY SERVICE FUNDING PROGRAM APPLICATION**

*(Please Print or Type)*

**DUE ON OR BEFORE: MONDAY, SEPTEMBER 13, 2021**

**PROJECT/PROGRAM INFORMATION**

Amount Requested: \$ \_\_\_\_\_ MAXIMUM ALLOWABLE: \$5,000 PER ORGANIZATION

Project/Program Title: \_\_\_\_\_ Start Date: \_\_\_\_\_ End Date: \_\_\_\_\_

Physical Address of Project/Program: \_\_\_\_\_

INCLUDE IF DIFFERENT THAN ORGANIZATION'S MAILING ADDRESS

If Grant is Awarded, Make Check Payable to: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

**ORGANIZATION AND GEOGRAPHIC AREA SERVED**

Name of Applicant Organization: \_\_\_\_\_ Year Organization Founded: \_\_\_\_\_

Website: \_\_\_\_\_ Number of Paid Staff: \_\_\_\_\_ Number of Volunteers: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Title/Position: \_\_\_\_\_

Contact Person's Email Address: \_\_\_\_\_ Telephone: \_\_\_\_\_

Geographic Area(s) the Organization Serves: \_\_\_\_\_

Geographic Area(s) the Project/Program Serves: \_\_\_\_\_

NOTE: COMMUNITY SERVICE FUNDING GRANT PROGRAM FUNDING MUST BE EXCLUSIVELY USED TO SERVE TEMECULA.

**NONPROFIT STATUS**

Is this organization incorporated as a nonprofit? Yes  Date of Incorporation as a Nonprofit: \_\_\_\_\_

No  IF NO, THEN INELIGIBLE TO RECEIVE CITY FUNDING

**Federal** Identification Number: \_\_\_\_\_ **State** Identification Number: \_\_\_\_\_

Print out and attach to this application Verification from Federal (IRS) and State (FTB) as follows:

1. Attach IRS Deductibility Status using this link: <http://apps.irs.gov/app/eos/>
2. Attach State Entity Status Letter using this link: [https://www.ftb.ca.gov/online/self\\_serve\\_entity\\_status\\_letter/index.asp](https://www.ftb.ca.gov/online/self_serve_entity_status_letter/index.asp)
3. Attach first page only of most recent IRS Form 990 or attach print out of detailed info about your charity found on this State Registry's Search Tool: <http://rct.doj.ca.gov/Verification/Web/Search.aspx?facility=Y>

Has the organization or any members of the Board of Directors of the organization been involved with any personal business transactions valued over \$500 including any business transactions, negotiations, investments, or interests in real property with a Temecula City Council Member during the past 12 months? No  Yes  IF YES, BRIEFLY DESCRIBE:

Is a Temecula City Council Member a member of the Board of Directors or an Officer of the organization? No  Yes  IF YES, PROVIDE COUNCIL MEMBER'S NAME AND TITLE WITHIN THE ORGANIZATION:

This Application has been authorized by the organization's:  
 Executive Committee  Board of Directors  Members-at-Large

**MISSION STATEMENT OF ORGANIZATION**

Briefly describe the organization's mission/goals and objectives:

**FINANCIAL STATEMENTS**

Upon request, copies the organization's current budget/financial statements (balance statement and income statement), and if available CPA's audit, *may* be needed to demonstrate sound financial management. Do not submit now.

**CITY OF TEMECULA FUNDING – OTHER SOURCES**

Within the past two years, has your organization received (or concurrently requesting) any other sources of funding from the City of Temecula? No  Yes  IF YES, PROVIDE INFORMATION IN TABLE BELOW:

NAME OF PROGRAM/PROJECT FUNDED BY THE CITY GRANT OR SPONSORSHIP	AMOUNT	MONTH + YEAR FUNDING RECEIVED	NAME OF CITY GRANT OR SPONSORSHIP
	\$		
	\$		
	\$		
	\$		
	\$		
	\$		

**GRANT FUNDING PROJECT/PROGRAM DESCRIPTION**

NOTE: RECEIPTS/INVOICES WILL BE REQUIRED TO BE SUBMITTED TO THE CITY TO DEMONSTRATE THE ORGANIZATION USED GRANT FUNDING AWARDED BY THE CITY TO SUPPORT THE PROJECT/PROGRAM AS DESCRIBED HERE. SEE COMPLAINEE REPORT ON APPLICATION FOR DETAILS.

---

1. Briefly describe THE PROGRAM / PROJECT the Temecula grant funding will be used to support.

---

2. Describe HOW YOUR ORGANIZATION WILL BE SPEND the grant funding (if awarded). Also, include equipment or services to be purchased and why.

---

3. If awarded, explain HOW the grant funding will specifically BENEFIT TEMECULA RESIDENTS.

Estimated number of PEOPLE FROM TEMECULA EXPECTED TO BENEFIT from this Project/Program:

Estimated number of VOLUNTEERS INVOLVED in this Project/Program:

---

4. SUMMARY STATEMENT: Summarize answers 1 - 3 (above) in 50 words or less to describe the project/program and how the grant funds will be used.

5. Provide Project/Program budget details below.

PROJECT/PROGRAM BUDGET		
LINE ITEMS FOR PROJECT/PROGRAM	REVENUES	EXPENSES
VARIOUS TYPES OF REVENUES/INCOME FOR THE PROJECT/PROGRAM		
Amount of money requested from the City of Temecula Community Services Grant (Not to exceed \$5,000)	\$	
Cash contributed to Project/Program by the Applicant Organization	\$	
Other grants or funding already awarded for Project/Program, if any	\$	
In-Kind match amount or volunteer credit hours estimated amount	\$	
VARIOUS TYPES OF EXPENSES FOR THE SPECIFIC PROJECT/PROGRAM		
Staffing Expense for Project/Program (This amount is ineligible to be funded by City's Grant; however please include.)		\$
Equipment Expense For Project/Program		\$
Food Expense For Project/Program		\$
Marketing Expense For Project/Program		\$
Supplies Expense For Project/Program		\$
Facilities/Rent Expense For Project/Program		\$
Other Expense For Project/Program		\$
TOTAL BUDGET FOR PROJECT/PROGRAM	\$	\$

**PREVIOUS\* FISCAL YEAR (FY) 2020-2021 COMPLIANCE REPORT**

\*IF YOUR ORGANIZATION WAS NOT AWARDED A COMMUNITY SERVICE FUNDING GRANT IN FY 20/21 (LAST YEAR), THEN SKIP THIS PAGE.

If your organization was awarded a Community Service Funding Grant in FY 2020-2021 (last year) by the City of Temecula, please submit this information.

If your organization was awarded a Community Service Funding Grant in Fiscal Year 2020-2021 by the City of Temecula, all grant funds received must have been expended anytime on or between July 1, 2020, and June 30, 2021. In addition, all grant funds must be substantiated with proper back-up documentation. Failure to provide proper documentation may jeopardize any future funding. City of Temecula reserves the right to conduct an audit and/or require additional back-up information to substantiate how funds received from the City were spent.

If the funds were not spent in accordance with the approved purpose stated on the Application, the organization will be required to refund the amount of funds. To substantiate that Fiscal Year 2020-2021 funds received from the City were spent appropriately, proper back-up documentation including the table below with accompanying receipts/invoices, must be submitted to the City **on or before due date: September 13, 2021.**

**EXPENDITURE REPORT due on or before September 13, 2021**

1. Provide the number of beneficiaries living in 92590, 92591 and 92592 that directly benefited from this program (approximate number of beneficiaries if you don't have a precise number): \_\_\_\_\_
2. Fill out this table (include additional copies if needed to explain all expenditures)
3. Attach Receipts/Invoices (in the same order as listed in this table)
4. Send to: City of Temecula, 41000 Main St., Temecula, CA 92590, Attn: City Manager's Office - CSF

**Organization:** \_\_\_\_\_ **Name of Project/Program:** \_\_\_\_\_

**Amount of Grant Fund Awarded:** \$ \_\_\_\_\_ **Month + Year Grant Received from City:** \_\_\_\_\_

Attachment Number	Name of Company on Receipt/Invoice	Date (Mo/Day/Yr) on Receipt/Invoice <small>Must be dated on or between July 1, 2020 - June 30, 2021</small>	Amount of Expenditure	Describe... (1) what the expenditure was (2) purpose of the expenditure <small>MUST support Project/Program description on Application + Award Letter</small>	Explain ... how the expenditure specifically benefited Temecula residents <small>If names/addresses of Temecula beneficiaries are available, please attach.</small>
1			\$		
2			\$		
3			\$		
4			\$		
5			\$		
6			\$		
7			\$		

**EXPENDITURE TOTAL**

Note: Expenditure Total must be equal to (or greater than) the "Amount of Grant Fund Awarded" (above) provided by the City

\$

## FISCAL YEAR (FY) 2021-2022 COMPLIANCE REPORT

**If your organization is awarded a Community Service Funding Grant in FY 2021-2022 by the City of Temecula, then this information is not due until Monday, September 12, 2022**

If your organization is awarded a Community Service Funding Grant in Fiscal Year 2021-2022 by the City of Temecula, all grant funds received must be expended anytime on or between July 1, 2021, and June 30, 2022. In addition, all grant funds must be substantiated with proper back-up documentation. Failure to provide proper documentation may jeopardize any future funding. City of Temecula reserves the right to conduct an audit and/or require additional back-up information to substantiate how funds received from the City were spent.

If the funds are not spent in accordance with the approved purpose stated on the Application, the organization will be required to refund the amount of funds. To substantiate that Fiscal Year 2021-2022 funds received from the City were spent appropriately, proper back-up documentation including the table below with accompanying receipts/invoices, must be submitted to the City **on or before due date: Monday, September 12, 2022.**

### EXPENDITURE REPORT due on or before Monday, September 12, 2022

1. Provide the number of beneficiaries living in 92590, 92591 and 92592 that directly benefitted from this program (approximate number of beneficiaries if you don't have a precise number): \_\_\_\_\_
2. Fill out this table (include additional copies if needed to explain all expenditures)
3. Attach Receipts/Invoices (in the same order as listed in this table)
4. Send to: City of Temecula, 41000 Main St., Temecula, CA 92590, Attn: City Manager's Office - CSF

**Organization:** \_\_\_\_\_ **Name of Project/Program:** \_\_\_\_\_

**Amount of Grant Fund Awarded:** \$ \_\_\_\_\_ **Month + Year Grant Received from City:** \_\_\_\_\_

Attachment Number	Name of Company on Receipt/Invoice	Date (Mo/Day/Yr) on Receipt/Invoice <small>Must be dated on or between July 1, 2021 - June 30, 2022</small>	Amount of Expenditure	Describe... (1) what the expenditure was (2) purpose of the expenditure <small>MUST support Project/Program description on Application + Award Letter</small>	Explain ... how the expenditure specifically benefitted <b>Temecula residents</b> <small>If names/addresses of Temecula beneficiaries are available, please attach.</small>
1			\$		
2			\$		
3			\$		
4			\$		
5			\$		
6			\$		
7			\$		

#### EXPENDITURE TOTAL

Note: Expenditure Total must be equal to (or greater than) the "Amount of Grant Fund Awarded" (above) provided by the City

\$

**SIGNATURE PAGE**

The applicant acknowledges and agrees to the following:

- Recipient is subject to all Community Service Funding Program requirements including submittal deadlines and payment disbursements.
- Every Community Service Funding application is considered individually and on its own merit.
- Awards will be given to organizations and activities that directly benefit the residents of Temecula.
- Funding is not immediately available to the recipient, and requires an award letter signature upon approval. Please allow time for checks to be processed.
- The awarding of Community Service Funding does not constitute an automatic annual allocation.
- The recognition for Community Service Funding should accrue to the City of Temecula.
- Community Service Funding must be spent as specified on the Application and records may be requested by the City of Temecula to ensure the funds were used appropriately.
- Community Service Funding grants will not be awarded or announced within the 60 days before an election in which an awarding Council Member is on the ballot.
- The recipient shall provide a full accounting with documentation on the use of awarded funds. The recipient shall return to the City any funds not spent or documented per the signed agreement.
- If awarded a Community Service Funding Grant by the City of Temecula last year, then compliance receipts must be submitted on or before this application's due date or this application may be rejected as incomplete.

**We hereby certify the information contained in this Application is true to the best of our knowledge and belief.**

**ORGANIZATION NAME:** \_\_\_\_\_

**MAILING ADDRESS:** \_\_\_\_\_ **PHONE:** (\_\_\_\_) \_\_\_\_\_ **EMAIL:** \_\_\_\_\_

\_\_\_\_\_

**PRESIDENT / AUTHORIZED OFFICER:** \_\_\_\_\_

Print Name

Title

**SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

(Month, Day, Year)

IF DIFFERENT THAN ABOVE,

APPLICATION PREPARED BY: \_\_\_\_\_

Print Name

Title

**SUBMIT ORIGINAL APPLICATION BY MONDAY, SEPTEMBER 13, 2021, TO:**

City of Temecula  
Community Service Funding  
Attn: City Manager's Office  
41000 MAIN STREET  
TEMECULA, CA 92590

Questions: Stacey.Brown@TemeculaCA.gov (951) 694-6413  
Betsy.Lowrey@TemeculaCA.gov (951) 693-3959