

**GRANTMAKING GUIDELINES**

The William G. Irwin Charity Foundation makes capital grants exclusively in California and Hawaii. Examples of capital grants include building improvements, vehicle requests, program equipment, and technology needs. Please see below for more information on eligibility and funding priorities. The Foundation does not provide operating or program support.

**GENERAL ELIGIBILITY:**

- Grants are made to public charities operating under an IRS 501(c)(3) status or fiscally sponsored by a 501(c)(3) organization.
- Grants are made exclusively to organizations in California and Hawaii
  - Please note that most grants are given to organizations serving the Greater Bay Area and Hawaii. The Foundation rarely funds in Southern California.
- Grants are made exclusively for durable capital projects. Please see the section below “Funding Priorities” for more detail on what is considered a durable capital project.
- The foundation **does not** fund endowment drives, events, general operating expenses, programmatic support, annual appeals, videos, medical research, or scholarships.

**FUNDING PRIORITIES:**

- The foundation receives a high number of applications each year. The foundation prioritizes organizations providing basic needs (shelter, food etc), medical facilities, and private schools. They also primarily fund organizations serving the Bay Area and Hawaii.

**PROJECT SPECIFIC ELIGIBILITY:**

- Please note that the Foundation prefers lawsuits to be resolved prior to approving funding and may decide not to move your application forward until the lawsuits have been resolved.
- Organizations need to raise 75% of project funds before applying. However, if the applicant believes they will reach that mark by the time the board meets or soon after, they may go ahead and apply. Additionally, if the applicant is asking for the full cost of the project to be funded OR if the request will help them reach the final cost of the project, then the 75% requirement does not apply. Please note that the Foundation prefers if organizations have at least one additional funder supporting the capital project.
- Grant requests should generally fall under \$200K, in particular if the organization has never received a grant from the foundation.
- The foundation does not fund planning or needs assessments for capital projects.
- The Foundation does not fund soft costs, only hard costs:
  - What are Hard Costs: These are the direct, tangible costs associated with the physical construction or renovation of a building or structure. Examples: Construction materials, labor, mechanical systems, electrical systems, plumbing systems, permanent fixtures, site work, paving, landscaping, utility connections, permanently affixed furniture, fixtures, and equipment.
  - What are Soft Costs: These are the indirect costs associated with planning, designing, and managing a project. Examples: Architectural fees, engineering fees, permits, inspections, legal fees, consulting fees, project management, fundraising services, loan origination fees, interest, builder’s risk insurance, liability insurance, feasibility studies, site surveys, environmental assessments.

#### **FOR ORGANIZATIONS THAT ARE REAPPLYING:**

- The foundation will consider grant applications from the same organization only after three full years have elapsed since the last grant was awarded.
- If your application is denied, we ask that you wait one year before reapplying and that your next application be for a different project from the one previously denied.

#### **AREAS OF FUNDING:**

##### Building construction and renovation

- The foundation will fund any contracted labor directly associated with the project. This could include labor for removal or installation of materials, or the hiring of expertise needed to complete the project, such as engineers or contractors.
- The foundation does not fund planning or needs assessments for capital projects.
- The foundation does not fund staff time for project management.

##### Building purchase

- The foundation considers funding for the purchase of buildings.
- The foundation will consider the funding of buildings already purchased.

##### Equipment and Furnishing

- The foundation considers funding of furniture, program equipment, and medical equipment purchases.
- The foundation prioritizes requests to purchase equipment that will be used by or mostly benefit program participants.

##### Technology

- The foundation considers funding for computers, laptops, servers and phone systems.
- The foundation does not fund software or consultants to build out software projects.
- The foundation does not award grants for website development projects or software.

##### Vehicles

- Insurance, gas, advertising on van (wrap-around printing), and warranties are not covered by grants.

#### **HOW TO APPLY:**

The foundation accepts applications exclusively through an online application process. You will not be able to start a new application in the grants portal until the submission window has opened.

- [Download the application overview here.](#)
- [Download the online application instructions here.](#)
- Access the online application here: <https://pfs.smartsimple.us/welcome/irwin>.

#### **OVERVIEW OF APPLICATION PROCESS**

The Foundation Trustees review all applications. If the application is moved to the next phase, a Trustee will reach out directly to schedule a phone call or site visit to further discuss the project.

If you have any questions about applying, please reach out to Melissa Morazán at [mmorazan@pfs-llc.net](mailto:mmorazan@pfs-llc.net). Please note that we are unable to review proposals prior to their submission.

**REPORTING PROCESS**

The Foundation utilizes an online grants management portal where applicants can submit grant requests and reports and review their grant history online.

All grantees are required to submit a report at the completion of the grant period, as specified in the grant agreement. Reports involve submitting PDF copies of all relevant invoices/receipts or a financial statement outlining how funds were spent and answering two short narrative questions.

Please use the login information used for submitting your organization's proposal on the grants management portal. If you do not remember the email address that was used for your organization's profile, please contact Rachel Murch Watters at [rmurchwatters@pfs-llc.net](mailto:rmurchwatters@pfs-llc.net). Please do not register and create a new account.