

## **Grantmaking Process**

### Step 1: Exploration of Potential Grant/Investment Opportunities

1. Informed by community stakeholders, staff and/or advisory committee members (funder, community, county/city) identify and explore potential grant/investment opportunities.
2. Staff conduct a preliminary review, which may include research and conversations with community partners, to determine if the opportunities align with collaborative goals and strategic direction.

### Step 2: Request Concept Paper

1. If the opportunity aligns with the goals and strategic direction, request a concept paper.
2. The organization, or group of organizations if it is a collaborative initiative, submits a concept paper outlining the proposed activities, objectives, potential impact, and preliminary financials.

### Step 3: Concept Paper Review

1. The appropriate advisory groups review the concept paper, offering feedback that will be shared with the CFSEM review committee (CFSEM program officers and other relevant staff).
2. If the concept paper outlines a funding request of \$300k or above, the requestor will be required to present to members of the CFSEM review committee and advisory committee members who wish to participate. Feedback is documented.
3. The CFSEM review committee formally evaluates each concept paper. Feedback and recommendations are documented.
4. Based on the formal review by the CFSEM review committee, the team determines if the concept paper should proceed to the formal application stage.

### Step 4: Invitation for Formal Application

1. For those that have been selected to move forward, each organization is invited to submit a formal application based on the approved concept paper, including comprehensive project plans and financial details.

### Step 5: Decision Making

1. Using the goals and strategic direction of the PFC, the CFSEM review committee reviews the application and makes the final decision to recommend the grant to the CFSEM Board of Trustees. This process leverages CFSEM's collective expertise and utilizes CFSEM's established grant processes.
2. The grant/investment moves through the Community Foundation's grant approval process.
3. The final decision is communicated to the organization and PFC advisory committees.