San Diego Law Firm Giving Guidelines

MISSION

San Diego Law Firm's mission is to form alliances with community-based nonprofit organizations within the markets SDLF serves, to enhance educational opportunities for children and to promote the growth of targeted communities through economic development initiatives.

FUNDING PRIORITIES

San Diego Law Firm supports a variety of nonprofit organizations with a special emphasis on those that work to achieve sustainability and touch a diverse population, in particular, those that support **early childhood education** and/or **economic development**.

Education

San Diego Law Firm supports educational programs for children and youth, particularly early education initiatives that serve low-and moderate-income children (birth through five), their teachers and families. Priority is given to programs that focus in the areas of math, science or the arts and include one or some combination of the following:

- Direct services for children in their classroom or community
- Professional development for teachers
- Family engagement of children being served by grants
- Volunteer opportunities for SDLF employees

Economic Development

Economic development organizations, including those which enhance the quality of life through neighborhood revitalization, cultural enrichment and human services are given support. Priority is given to community development initiatives that strategically promote the growth of targeted low-and moderate-income communities and/or provide services to these communities.

Affordable Housing

San Diego Law Firm understands the critical need for affordable housing for low-and moderate-income individuals. We are committed to providing support to nonprofit organizations that give counseling and services to help these individuals maintain their housing stock; offer transitional housing units and programs; and/or offer credit counseling assistance to individuals, helping them to prepare for homeownership.

Community Development

Because small businesses are often critical components of community growth and help foster business development, San Diego Law Firm provides support to nonprofit organizations that (i) offer technical assistance to, or loan programs for, small businesses located in low-and moderate-income areas or (ii) support small businesses that employ low-and moderate-income individuals.

Community Services

Support is given to social services organizations that benefit the health, education, quality of life or provide essential services for low-and moderate-income individuals and families. San Diego Law Firm supports job training programs and organizations that provide essential services for their families. SDLF provides support for early learning and educational enrichment programs for children in low-and moderate-income families as well as for the construction of community facilities that benefit low-and moderate income communities.

Revitalization and Stabilization of Low-and Moderate-Income Areas

San Diego Law Firm supports nonprofit organizations that serve low-and moderate-income neighborhoods by improving living and working conditions. Support is given to organizations that help stabilize communities, eliminate blight and attract and retain businesses and residents to the community.

Arts and Culture

Support is given for cultural enrichment programs benefitting the community.

Green Initiatives

SDLF provides support to environmental projects and green initiatives in the community.

FUNDING RESTRICTIONS

San Diego Law Firm will not provide support for:

- organizations that discriminate by race, color, creed, gender or national origin
- religious organizations, except for non-sectarian activities
- advocacy groups
- operating funds for agencies that receive funds through annual United Way campaigns
- individuals or private foundations
- annual funds of hospitals or colleges and universities
- conferences and seminars
- tickets and goodwill advertising
- organizations with an overhead rate of 15% or higher

GENERAL INFORMATION

Organizations receiving support from San Diego Law Firm must have a current Internal Revenue Service tax-exempt designation and be eligible to receive charitable contributions. In addition, the proposed activity must occur in a community where SDLF has a significant presence.

GRANT PROPOSAL GUIDELINES

Grant requests must include the following information:

1. Proposal Summary, including a description of the population to be served (please limit to one page).

2. Brief description of the organization and its purpose

3. Statement of how the organization addresses at least one of San Diego Law Firm's funding priority areas:

- Educational and developmental opportunities that improve the **school readiness** of underserved children, by providing support in one or more of the following critical areas:
    - Social and Emotional Development
    - Teacher Training
    - Arts and Culture

- Economic development, particularly that which enhances the overall quality of life for the region

4. Statement of the problem or need to be addressed, in particular:

- School Readiness (Please clarify the specific need within school readiness that you will address: social and emotional development, teacher training and/or arts and culture)
- Community Revitalization
- Human Services

5. Description of the specific project or activity that is the focus of grant request, e.g., number of people to be served, recruitment/outreach, management structure, anticipated outcomes (measurable)

6. Statement of expected accomplishment and method to evaluate results

7. Statement of how you plan to acknowledge support from SDLF.

Attachments

In addition, proposals should be accompanied by the following (Grant requests for less than $1,000 need not include the items marked with an asterisk):

A. Project schedule, including projected budget*
B. Plans to sustain project*
C. Track record of working with community organizations and civic leadership*
D. List of board of directors, identifying each by occupation and organization
E. Statement from the IRS confirming the organization's 501(c)3 or other tax-exempt status (i.e. determination letter)
F. List of recent contributions and amounts* (organizational budget and, if applicable, project budget for this particular project)
G. Board-approved organization budget for the current year
H. Audited financial statements for prior year and most recent IRS 990

I. Resume of key staff members*
J. Organizational brochure, pamphlets or other descriptive material if available
K. Strategic or long-range plan for the organization*
L. Verification of legal standing

[VERIFICATION OF GOOD LEGAL STANDING]

A copy of this form should be completed by each of the entities applying for funding.

If you answer "Yes" to any of the following questions, please provide details, including the applicable regulatory body or governmental agency, the court or agency in which the proceeding is, or was, pending. The date it was instituted, the principal parties, a description of the factual basis alleged to underlie the proceeding, the relief sought, and any mitigating circumstances. Please describe any event that has occurred within the last ten (10) years.

"Key Person" means any current director, officer, manager, or key employee of the entity, or any persons with similar duties or responsibilities.

1. Has the entity or any Key Person been subject to any criminal legal proceedings involving a felony offense?
   ☐ Yes ☐ No

2. Has the entity been subject to any regulatory or governmental investigations, audits, or inquiries, whether resolved, pending, or threatened?
   ☐ Yes ☐ No

3. Has the entity or any Key Person been party to any resolved, pending, or threatened legal proceeding in which the entity or Key Person was either a party adverse to SDLF, or in which the entity had a material interest adverse to SDLF?
   ☐ Yes ☐ No

_____ _____

Entity Name Authorized Signature