

## Healthy Petaluma Foundation: General Operating Support

### Focus Priority Area: Mental Health

### Grant Program Overview

#### ABOUT HEALTHY PETALUMA FOUNDATION

Since its formation in 1946, Healthy Petaluma has invested in programs, services, and organizations that improve the health and well-being of our residents. The Healthy Petaluma Foundation is uniquely positioned to understand the health priorities of southern Sonoma County and is committed to allocating funds to support our community's greatest health needs.

#### ABOUT THIS GRANT PROGRAM

A foundation can support its community in many ways. A **General Operating Support (GOS)** grant is one of those ways by providing unrestricted funding for an applicant's overall mission rather than a specific project or initiative. General Operating Support grants signal a foundation's trust in grantees by offering the flexibility to determine how to dedicate financial resources for the greatest impact.

The Healthy Petaluma Foundation General Operating Support Grants Program has been designed to support and amplify organizations exempt from federal taxation under Section 501(c)(3) of the Internal Revenue Code or equivalent exemptions, such as a public/governmental agency, programs or institutions serving the Healthy Petaluma district service areas in South Sonoma County (see map in appendix.) This grant program provides flexible funding while also offering applicants clarity about the foundation's preferences for using the funds.

#### GRANT APPLICATION TIMELINE:

Monday, October 9, 2023: Grant program launches, applications available

Wednesday, October 18, 9:00 a.m.: Optional grant workshop presentation

Friday, November 3, 2023, 5:00 p.m.: Application submission deadline

Early-mid December: Applicants informed of funding decisions

Early January: Funds distributed

#### ELIGIBILITY AND PRIORITY FOCUS AREA

While the mission and daily work of the Healthy Petaluma District and Foundation aims to improve health outcomes for our community across several priority areas, this GOS grant program is intended to focus exclusively on the health issue of mental health. Often, the topic of mental health is perceived as synonymous with mental illness or framed only in the context of trauma, substance abuse or crisis. However, everyone has mental health just like everyone has physical health. The U.S. Surgeon General, Dr. Vivek Murphy, reminds us that "Mental health affects every aspect of our lives: how we feel about ourselves and the world; solve problems, cope with stress, and overcome challenges; build relationships and connect with others; and perform in school, at work, and throughout life...Mental health conditions are real, common, and treatable, and people experiencing mental health challenges deserve support, compassion, and care, not stigma and shame. Mental health is no less important than physical health. And that must be reflected in how we communicate about and prioritize mental health."

As such, this general operating support grant seeks to invest in organizations who prioritize the equitable treatment, prevention, promotion, or early intervention for mental health. Examples of eligible organizations include those who:

- Educate the public about the importance of mental health and reduce negative stereotypes, bias, and stigma around mental illness
- Increase mental health literacy for populations spanning all life stages (youth, adults, seniors, etc.) or community roles (healthcare workers, parents, caregivers, teachers, etc.)
- Implement evidence-based programs that promote healthy development, support children, youth, and their families, and increase their resilience.
- Address the unique mental health needs of at-risk populations, such as racial and ethnic minorities, LGBTQ+, and individuals with disabilities.
- Implement trauma-informed care (TIC) principles and other prevention strategies to improve care
- Provide a continuum of supports to meet student mental health needs, including evidence-based prevention practices and trauma-informed mental health care.
- Identify and address the mental health needs of parents, caregivers, family members, and employees/staff
- Foster connection in an effort to eliminate social isolation and loneliness
- Expand and strengthen suicide prevention and mental health crisis services
- Prioritize interventions that address social factors known to affect mental health, such as discrimination, food insecurity, and inequality.

Healthy Petaluma recognizes that strengthening economic supports like financial stability, job access, and affordable housing across our community is a foundational element of achieving and protecting mental health. *While the District and Foundation will continue to invest in policies, programs, and initiatives aimed at limiting economic barriers that contribute to poor mental health, these areas fall outside the scope of this grant. We expect these priority areas to be the focus of future grant cycles.*

Important note: The list of representative focus areas above is in no way intended to be exclusive or exhaustive. Mental health is influenced by a vast kaleidoscope of interconnected factors and influences, so we want to hear from you. If you do not see your work reflected in the list above, but the mental health of the population you serve is top of mind for your organization every day, and your organization has general operating support needs, please consider submitting an application. Your voice is so important.

## GRANT PROGRAM OVERVIEW

Our approach to grantmaking is research-driven and adaptive to the needs of our community. While we encourage applicants to identify their individual general operating needs, the Healthy Petaluma Foundation has conducted research and focus groups to identify priority areas that align with our vision and have proven to be an effective use of GOS grants.

Applicants are encouraged to reflect on these priority considerations when determining how they will use general operating funds. While we are not restricting applicants to these general operating priorities, *we will give preference to applicants who make a strong case for funding in one of these areas* (listed below in no particular order.)

*Fostering Diversity, Equity, Inclusion, and Belonging (DEIB):* The most impactful organizations are those that embed DEIB in their culture, strategies, and actions. We prioritize funding aimed at:

- Crafting, implementing, and refining DEIB practices and policies.
- Facilitating training programs, workshops, or consultations that support the institutionalization of DEIB within the organization.

*Leveraging Additional Funding:* Strategic growth often requires developing innovative ways of accessing new and diverse funding. We value applicants that:

- Skillfully leverage our funding to unlock additional financial support.

*Strengthening Organizational Infrastructure:* A strong infrastructure is the backbone of any organization. We will prioritize:

- Training and capacity-building for staff, ensuring they have the skills and knowledge to carry out the organization's mission.
- Technological advancements and infrastructure enhancement.

*Talent Attraction and Retention:* The lifeblood of any organization is its people. Given the current challenge of attracting and retaining staff, we will give preference to proposals that:

- Outline tangible, long-term strategies for providing competitive hiring incentives, salaries, and benefits.
- Incorporate professional development, wellness initiatives, and/or other supportive measures for staff enrichment and well-being.

*Leveraging Additional Funding:* Strategic growth often requires developing innovative ways of accessing new and diverse funding. We value applicants that:

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<b>APPLICATION DETAILS</b>
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Application Process:

We are committed to providing an equitable application process that respects the time of applicants and is accessible to all who meet the eligibility criteria. Before applying, we advise potential applicants to thoroughly review the eligibility requirements and application details to determine if their organization aligns well with the grant objectives.

All applicants are *required* to submit:

- Application
- Most recent financial statement, i.e., Income Statement or Profit & Loss Statement, Balance Sheet or Statement of Financial Position
- Organization budget
- Board of Directors List

Additionally, the following attachments are requested *when available*:

- Annual Report
- Current Strategic Plan
- Audited financial statements
- DEIB Statement and/or Policy Document

Submission Method:

Applications and relevant attachments should be sent to [rfaith@healthypetaluma.org](mailto:rfaith@healthypetaluma.org).

Application Review and Selection Process:

Following the submission of your application, it is important to understand the review and selection process to have clear expectations of the upcoming stages and timelines. Following is an outline to guide you through our process:

Post-submission Review:

We have a three-stage process for determining where to allocate grant funding, outlined below:

Stage 1: Preliminary Review - After the application deadline, all submissions will be screened to ensure they meet basic eligibility criteria. (this will link to eligibility criteria)

Stage 2: Panel Review - Applications that pass the preliminary review will be forwarded to our review panel. The panel will consist of two Foundation board members and at least three independent community members determined by the Foundation Board.

Stage 3: Deliberation and Selection - After the panel thoroughly reviews and scores all applications, the top-ranking applications will be identified for approval.

Application Evaluation Criteria:

When deciding to make a general operating support grant, Healthy Petaluma Foundation will be responsible for ensuring we've selected organizations whose work aligns with our mental health priority area and whose grant application makes a strong case for support in our general operating support objectives. It is also our duty to ensure that your organization is fiscally sound. Following are the evaluation criteria the review panel will use in making funding decisions:

- *Organizational alignment with Mental Health Priority Area*: Does the applicant's programmatic work address the equitable treatment, prevention, promotion, or early intervention for mental health?

- *Geographic Alignment:* Does the applicant offer programs and/or services within the service areas of the Healthy Petaluma District?
- *Impact of the Organization:* Do the strategic priorities and past achievements of the organization demonstrate its positive impact in southern Sonoma County?
- *Beneficiary Engagement:* Does the applicant work with populations that are typically on the margins and would benefit from services? Do they have an effective strategy for engaging beneficiaries?
- *Compelling Case for Use of Funds:* Does the applicant make a compelling case for the need and use of general operating support funds? (As noted, preference will be given to applications that align with the stated general operating priority considerations.)
- *Organizational Leadership:* Does the leadership of the organization have a solid track record in managing non-profits, educational institutions, or government agencies?
- *Financial Health:* Does the organization present solid financial statements and a reasonable budget for this grant? Is the financial model of the organization sustainable?

#### Timeline for Funding Announcement:

While the exact timeline might vary based on the number of applications received and other unforeseen factors, applicants can typically expect feedback within 4-6 weeks post-submission. We urge applicants to keep an eye on their email for updates from our side.

#### Grant Duration and Reporting:

This is a six-month grant, with funds allocated in January 2024. A final report will be due 30 days after the completion of the grant.

#### Technical Support:

An optional virtual grant workshop will be offered on Wednesday, October 18, at 9:00 a.m. The workshop will provide an overview of the grants program with time for potential applicants to ask questions. The workshop will be recorded and made available on our website.

Any additional questions can be submitted in writing to [rfaith@healthypetaluma.org](mailto:rfaith@healthypetaluma.org)

If you need troubleshooting support with the application, please contact [bspierings@healthypetaluma.org](mailto:bspierings@healthypetaluma.org)

#### Additional Elements of the Grant:

As we develop the Healthy Petaluma Foundation, we are eager to learn from those we serve. At the end of the grant cycle, we encourage grantees to join us for a feedback session to share their experiences with our grant program.

#### Additional Eligibility Criteria:

Funds from this grant cannot be used for the following:

- Individuals
- Endowment campaigns
- Retirement of debt
- Annual campaigns, fundraising events, or expenses related to fundraising
- Programs that proselytize or promote any religion or deny services to potential beneficiaries based upon religious beliefs.
- Expenses related to lobbying public officials

- Sponsorships of charitable events
- Political campaigns or other partisan political activities
- Unfunded government mandates
- Replacement funds to allow funding to be shifted to other programs or budget areas.
- Organizations intending to “pass-through’ or re-grant District funds to other organizations.
- Any organization that discriminates against others based on, including but not limited to, race, color, creed, gender, gender identity, sexual orientation or national origin.