

# Funding Guidelines and Tips

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## Funding Guidelines: Annual Funding

### Program Overview

The Pacific Life Foundation’s mission with our grants program is:

- To strategically support issue areas that align with the Foundation's interests and serve the communities where a concentration of Pacific Life employees work and live
- To support programs that recognize and encourage positive change in our local communities and populations served
- To respond to the greatest needs of our communities by partnering with organizations that can best identify opportunities or challenges, bringing forward proven strategies or finding innovative ways to have a meaningful impact on those most in need

Online grant applications are accepted from nonprofits seeking funds for programs or capital projects in the areas of arts and culture; civic, community & economic development; education; health and human services; and the environment. Marine Mammal research grants are not part of this grant process.

Every year, the Pacific Life Foundation receives more requests than it can fund. For this reason, the Foundation has established guidelines that allow it to use its resources as wisely as possible. Receiving and reviewing grant requests at a predetermined time each year provides the framework for a thorough and thoughtful grant making process.

## Timeline

### Application Timeline for a 2023 Program or Capital Grant

- Funding for the 2023 grant cycle is closed

### Application Timeline for a 2024 Program or Capital Grant

- Applications accepted online July 15 – August 15, 2023
- Mid-November 2023 > Pledges to selected nonprofits will be announced
- January 2024 > Funding distributed
- January 2025 > Year-end progress update and grant impact report due for awarded grants

*Award of a grant does not mean that future support will automatically be available.*

## **Funding Guidelines: Application Information**

### Geographical Considerations

Contributions through the grant application process are made where we have the largest concentration of Pacific Life employees – Orange County, California. In addition, some grants are provided in the greater Omaha, Nebraska area and the greater Lynchburg, Virginia area. Ideally, nonprofits should serve a large area, usually including more than one city or community. Organizations not serving the Orange County, Omaha, or Lynchburg areas are ineligible to apply.

### Length of Funding Period

Nonprofits may reapply annually for funding; however, grants are made to any one nonprofit for no more than three consecutive years. Support may again be requested after a two-year interim period. Exceptions are made for nonprofits where a Pacific Life officer serves on the board of directors. During the two-year interim period, a nonprofit may submit an application for a capital grant.

### Types and Ranges of Funding - Program Grants and Capital Grants

Program grants range up to \$15,000 for a one-year period of funding and are given to support programs, operating expenses, or collaborative programs with other nonprofits. If your organization would like to be considered for multi-year funding, you will have an opportunity to explain why your program should be considered for funding for up to a three-year period.

Capital grants typically range from \$25,000 to \$100,000 and are given to a nonprofit with an organized campaign already under way to raise substantial funds; for example, to finance a building or for major renovation. More than 50 percent of the campaign goal (excluding pledges of in-kind donations, anonymous gifts, and loans) must be pledged prior to consideration by the Foundation.

Nonprofits can apply for a 2024 capital grant if their last Foundation capital grant payment was received in or before 2021.

### **Restrictions**

The Pacific Life Foundation does not accept applications from and/or for:

- Organizations with total revenue of under \$1 million if serving Orange County, CA or Omaha, NE or under \$500,000 if serving Lynchburg, VA, as reported on line 12 of the latest IRS Tax Form 990
- Programs/projects with budgets of less than \$100,000 if serving Orange County, CA or Omaha, NE or under \$50,000 if serving Lynchburg, VA
- New organizations established or operating for only 3 years or less
- Nonprofits with less than five board members
- Associations, labor organizations, fraternal organizations, athletic or social clubs
- Family Foundations
- Individuals
- Sports leagues or teams
- Political parties, candidates, or partisan political organizations
- K-12 schools, school districts, or school foundations as these entities are eligible through the Foundation's annual invitation-only "3Ts of Education" program
- Sectarian or denominational religious organizations, except for programs that are broadly promoted, available to anyone, and free from religious orientation and proselytization
- Organizations that have a written policy of discrimination on the basis of race, color, national origin, age, disability, religion, or sex (including pregnancy, sexual orientation, and gender identity)
- Fundraising events (e.g., sponsorships, membership drives, luncheons/dinners, walks/runs, or tournaments)
- Conferences and special events
- Advertising sponsorships
- Marine mammal research funding is provided on an invitation-only basis

### **Preparing a Grant Application**

When completing the Pacific Life Foundation Grant Application online you will be asked to provide the following:

- The nonprofit's mission and vision
- Specific expected outcome metrics
- The challenge or opportunity the requested program will aim to solve for its participants, the community or sector including anticipated impact, critical components to success, and program sustainability
- Line-item budget for the program/project to be funded

- Nonprofit's most recent audited financial statement (if none, please provide IRS Form 990)
- Nonprofit's current annual budget (revenues and expenditures)
- List of corporations and foundations, along with their contribution amounts, that provided funding to your nonprofit from July through June of the current year
- Roster of the nonprofit's board of directors, advisory board members, and administrative staff (please note any family relationships that may exist)
- Copy of your nonprofit's tax-exemption letter (note: there is no need to submit the letter if your nonprofit was previously funded by the Pacific Life Foundation and the letter is current)
- Copy of the nonprofit's informational brochure, if available
- If requesting a capital grant, provide a list of corporate and foundation capital campaign supporters and their contribution amounts

If a nonprofit meets the eligibility requirements for both a general and capital grant, it may submit both grant applications concurrently.

### **Application Tips**

Nonprofit organizations are encouraged to ensure their application is complete and concise.

- Eligible nonprofits are encouraged to apply for the program of greatest need. The Pacific Life Foundation cannot provide any guidance or direction on what program to apply for.
- The requested program/project for consideration should be sustainable, having at least one other committed or other funders solicited for support.
- If you have not already set up a Blackbaud Outcomes Grantee Account, you will need to do so. Please review our User Guide at [PacificLifeFoundation.com](https://portal.blackbaudoutcomes.com) for more information.
- Please do not provide more information than requested in the application. Also, note that videos, DVDs, CDs, notebooks, and/or binders will not be accepted and will be discarded. Faxed, mailed, and emailed applications are not accepted.
- Please do not use all caps when completing your online application.
- Thoroughly review your application before submitting.
- If you need to get back to your application for completion at a later date, please go to <https://portal.blackbaudoutcomes.com> to log into the portal. Do not start a brand new application.
- The grant cycle will close for 2024 application submissions at 12:00 a.m. on August 16.
- Still have questions? Please contact the Foundation at [plfoundation@pacificlife.com](mailto:plfoundation@pacificlife.com).