



SIMÓN BOLÍVAR FOUNDATION

KNOWLEDGE TRANSFER, NETWORKING AND EDUCATION

2024 GRANT PROGRAM

Simón Bolívar Foundation Inc. (the "Foundation"), a 501(c)(3) private foundation founded by CITGO Petroleum Corporation ("CITGO"), serves as a catalyst to transform lives by connecting and networking community members to take community action. The Foundation supports a wide range of charitable programming, creating sustainable impacts that benefit the wider community for years to come.

In 2019 the Foundation reviewed its mission, aiming at benefiting a larger group of individuals in need. The revised mission is to: "Improve the health of vulnerable individuals affected by disaster, conflict and poverty, with special attention to children and mothers in and from Venezuela."

The Foundation has three main objectives:

- Access - Increase access to medicine and nutrition, thereby improving wellbeing for low-income and vulnerable individuals and communities.
- Capacity - Enhance the capacity of medical professionals and caregivers to serve and treat patients in need through education and support.
- Empowerment - Increase the effectiveness of community organizations by empowering them to serve the health needs of the most vulnerable individuals in their communities, particularly children and mothers.

Background

The humanitarian crisis in Venezuela continues, with consequences for those in the country, including economic instability, food insecurity and a declining healthcare system.

Over the past decade¹, the public health system has deteriorated. Shortages of medical supplies and personnel, coupled with infrastructure failures, have rendered essential healthcare services inaccessible to nearly 70%² of the population. Without appropriate medical care, the risk of both physical and mental health conditions is also on the rise.

Furthermore, median household incomes barely reach a fraction of the cost needed to afford basic necessities, such as food and shelter, and millions experience food insecurity. Approximately 94.4% were in poverty without available income, equivalent in dollars, to acquire a basic basket of essential goods and services for an average of three people per household, while for more than 50%, income was not enough to purchase a basic food basket, placing them in extreme poverty³.

¹ [09-Salud-2022-1.pdf \(provea.org\)](#)

² [FOLLOW-UP-REPORT-ON-THE-COMPLEX-HUMANITARIAN-EMERGENCY-IN-VENEZUELA-2023-2.pdf \(humvenezuela.com\)](#)

³ [ENCOVI 2023: los hallazgos más destacados sobre las condiciones de vida de los venezolanos • UCAB Guayana](#)

Now one of the largest displacement crises in the world, with more than 7.7⁴ million Venezuelan migrants and refugees scattered across the globe by November 2023, children, women and other vulnerable members are among the groups of migrants leaving the country searching for better opportunities. The vast majority of the Venezuelan diaspora, more than 6.54 million, is in countries within Latin America and the Caribbean.

According to the UN High Commissioner for Refugees, more than 317,000⁵ Venezuelan migrants, crossed Panama's Darién Gap between January and November 2023, facing significant risks.

The health sector in Venezuela has been affected significantly, and the impact is seen in the loss of capacity and expertise in the country, loss of qualified health personnel who have left the country (approximately 50% of the country's doctors and 25% of nurses)⁶, and severe deterioration of the health infrastructure and capacity in the country due to low levels of investment. Addressing the continuous and increasing health demands of the population and the health care personnel shortage is more important than ever, as the Venezuelan health system is under constant stress.

In addition, data compiled by the United Nations show that Venezuela's humanitarian crisis is one of the least funded humanitarian crises in the world according to the Regional Refugee and Migrant Response Plan 2024, \$1.6 billion USD⁷ is required and only 0.5% is funded as of March 31, 2024. For 2023, the United Nations forecasted a requirement of \$173 million USD in health alone, with only 22% of the health needs funded in 2023⁸. With this, the Foundation's 2024 strategy and budget includes a Knowledge Transfer, Networking and Education grant program (the "Grant Program") that meets two of the Foundation's stated objectives of fostering knowledge transfer and capacity building. This Grant Program aims to enhance the capacity of medical professionals and caregivers to serve and treat patients in need through training in health, nutrition global practices, disaster medicine, education to beneficiaries, development of lower cadres of community health workers, and support of accredited institutions educating and training health professionals as well as organizations that implement charitable programs in building capacities.

Funding Priorities:

Priority will be given to grant proposals with activities targeted towards individuals and organizations in need, that:

- Train health professionals, doctors, nurses, and support personnel in and out of Venezuela and others in need;
- Help retain health personnel in Venezuela;
- Improve infrastructure of medical training facilities;

⁴ [Home | R4V](#)

⁵ [2024-03-06 USG Venezuela Regional Crisis Fact Sheet 2.pdf \(usaid.gov\)](#)

⁶ [Venezuela health profile \(humvenezuela.com\)](#)

⁷ [Home | R4V](#)

⁸ [OCHA VEN Funding Overview June 2023 v2 EN \(4\).pdf](#)



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- Perform studies and assessments that help the Foundation and other charitable organizations in assessing their needs and funding priorities;
- Create opportunities for networking and exchange of relevant information among organizations working in similar fields;
- Train organizations in improving their activities, including in the areas of fundraising, grantmaking, project management, and leadership development, among others;
- Raise awareness of the humanitarian crisis and relevant health issues in Venezuela and the region.

Process

The Foundation may decide to conduct an open call for grant proposals or a selective process by invitation for qualified charitable organizations considered strategic. The Foundation may also allocate funds to approve grant extensions for existing projects, subject to satisfactory performance. The Foundation does not accept unsolicited grant proposals.

Organizations must be a registered 501(c)(3) organization, have a fiscal sponsor that is a 501(c)(3) organization, or obtain a fiscal equivalency. In addition, organizations must have a long standing presence in Venezuela and/or in countries with Venezuelan and other migrants, with demonstrated capacity to successfully perform charitable projects within the scope of the Foundation's funding priorities.

In an open call for grant proposals, a specific document will be provided that outlines the details for the process, scope and timing. For selective processes by invitation, this document will serve as a guideline for evaluation of grant proposals.

In a selective process, the organizations will be invited to an introductory meeting where the Foundation will present its goals and objectives for the Grant Program and set the expectations for a grant project proposal, including a detailed description of the project as outlined in annex 1.

Organizations will be evaluated first based on their financial status, previous experience, capacity to successfully implement the project; and if it has worked with the Foundation in the past, demonstrating satisfactory performance.

All charitable projects presented must use the log frame approach, including clear goals, objectives, and indicators for monitoring progress and evaluation of long-term impact, and success criteria for each goal and objective.

The Foundation may evaluate the grant proposal with the help of its volunteer Community Advisory Team. The Community Advisory Team is made up of internal and external leaders who have in-depth knowledge and expertise in the non-profit field, public health, medicine, and/or nutrition, amongst other areas.

The Foundation, and volunteer Community Advisory Team if assisting with the review of the grant proposals, will review the grant proposals using established criteria per the scoring rubric included



below. The criteria outlined in the rubric establish guidelines to assist the Foundation and Community Advisory Team members in performing their independent analysis of grant proposals. The rubric is not intended to be all inclusive, and additional factors may be used to qualify grant proposals. Recommended projects should have a minimum score of 4: meets basic criteria. The final decision is made by the Foundation, in its sole discretion, considering available funds and priorities.

Grant proposals will be evaluated based on their ability to achieve impact in the following areas:

1. Addresses the Grant Program priorities.
2. Budget – cost effectiveness.
3. Project design/plan – a defined execution plan with achievable milestones and deliverables.
4. Project impact – measured in terms of goals and objectives met and relevant indicators, like community outreach, number of individuals trained and assisted, webinars performed, papers presented, etc.

SCORING RUBRIC

1	2	3	4	5	6	7
Does not meet criteria at all	Somewhat meets criteria	Mostly meets criteria	Meets basic criteria	Does a good job of meeting criteria	Exceeds criteria	Far exceeds criteria

Scores less than 4	Scores between 4 and 5	Scores 6 and above
PROJECT PROPOSAL MEETS PROGRAM PRIORITIES		
<ul style="list-style-type: none"> Does not address any program priorities effectively 	<ul style="list-style-type: none"> Meets expectations for one funding priority 	<ul style="list-style-type: none"> Strong alignment and connection to one or more funding priorities
BUDGET AND COST-EFFECTIVENESS		
<ul style="list-style-type: none"> Budget does not include sufficient line items or sufficient amounts for activities May not meet expectation to achieve project objectives with proposed budget 	<ul style="list-style-type: none"> Budget includes sufficient detail and sufficient amounts for all proposed activities Meets expectation to achieve project objectives with proposed budget 	<ul style="list-style-type: none"> Budget is highly detailed and includes a clear and realistic picture of how funds will be expended for proposed activities Far exceeds expectation to achieve project objectives with proposed budget



Scores less than 4	Scores between 4 and 5	Scores 6 and above
PROJECT DESIGN/PLAN		
<ul style="list-style-type: none"> • Project has no or unclearly stated goal(s) and objective(s) • Activities are not logically linked towards achieving any goals or objectives 	<ul style="list-style-type: none"> • Project has at least one goal and/or objective that addresses a program priority • Proposal has a basic plan with activities that build towards achieving stated goal(s) and objective(s) 	<ul style="list-style-type: none"> • Project has SMART (Specific, Measurable, Attainable, Relevant and Timely) goal(s) and/or objective(s) addressing one or more program priorities • Project has a highly detailed plan with suitable activities to meet goals and objectives
PROJECT IMPACT		
<ul style="list-style-type: none"> • Community or beneficiaries are minimally benefitted • Beneficiaries do not gain appropriate or useable skills/knowledge or appropriate services 	<ul style="list-style-type: none"> • Community or beneficiaries receive benefits during course of project • Beneficiaries gain skills/knowledge or receive adequate services 	<ul style="list-style-type: none"> • Benefits will outlast the project or program • Beneficiaries gain high value skills or knowledge or receive high quality service delivery • Project addresses root causes of a problem or issue

Application Due Date and Grant Period:

The Foundation will accept grant proposals on a rolling basis every year until funds are awarded and expended. The Foundation anticipates awarding grants with a maximum period of one year. Please plan your organization's grant activities accordingly.

Grant Awards

The Foundation anticipates awarding up to \$750,000 in grants through the Grant Program with an estimated range in the amount of \$50,000 to \$250,000 per year/per organization. The maximum grant award will be \$250,000 per year/per organization, subject to an internal verification process and execution of a formal grant agreement with the Foundation that incorporates the approved grant proposal and other terms and conditions to ensure these grants are used for the charitable purposes intended by the Grant Program. The grant agreement will include detailed description of the charitable program, activities, budget, and metrics. The Foundation reserves the right to amend or terminate the Grant Program at any time and for any reason without notice.

The Foundation requires verification tools for each indicator applicable, to verify all the data and information reported. In cases where organizations with a demonstrated strategic relationship component have internal regulations or procedures in place that limit the information sharing



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process, the support documentation and its verification process may be mutually agreed upon, based on the experience and processes of each organization as determined by the Foundation.

Funding will be available for:

- Program Implementation: Day to day management of the approved charitable programs.
- Operation and Administrative Costs: Non-program staff salaries, subject to prior screening, (e.g. manager, accountant), utilities, rent, supply expenses, and other expenses (e.g. legal and tax support) as described in the approved projects. Operation and administrative costs shall not exceed 20% of the total approved funding request and should be supported for audit purposes.
- Shipping costs and transportation of supplies to Venezuela: These costs must be reported, including logistics and specifications, and submitted with supporting documentation.

General Eligibility Requirements and Exclusions

Eligibility Criteria for Grant Programs

- Certify tax-exempt status under Section 501(c)(3), Title 26 of the U.S. Internal Revenue Code. If the organization that wishes to apply for a grant is not registered and recognized as a 501(c)(3) public charity in the U.S., it MUST apply for the grant through a U.S. 501(c)(3) public charity acting as fiscal sponsor of the sponsored organization. Alternatively, the organization may provide all information needed for an equivalency review to be performed by the Foundation, demonstrating that the organization is the foreign equivalent of a domestic public charity. Please note an equivalency review could significantly affect the timeline of grant awarding for projects.
- Can demonstrate at least two years of operations.
- Can demonstrate development and implementation of projects in the areas of the Grant Program, and management of projects in accordance with the magnitude of the grant to be awarded.
- Can demonstrate expertise in the country covered by the Grant Program.
- Provide copies of the organization's governing documents and current Directors and Officers.
- Provide annual reports, financial statements, and tax filings for at least the last two years and such other documents or information as the Foundation may reasonably request to properly qualify the applicant organization.
- Meet the compliance requirements and any other requirements of the Foundation to be awarded a grant.
- Not discriminate based on race, religion, creed, national origin, disability, handicap, age, sexual orientation, marital status, veteran status, or any other basis prohibited by applicable law.



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Funding Exclusions for Grant Programs

- Individual needs, including scholarships, sponsorships, and other forms of financial aid
- Fundraisers through third party organizations
- Goodwill advertising, souvenir journals, or dinner programs
- Sectarian activities of religious organizations
- Political causes, candidates, organizations or campaigns or lobbying
- Books, magazines, or articles in professional journals.
- Capital projects and/or endowments (exceptions made for professorships and scholarships related to endowments in selected universities).
- Sports sponsorships.
- Door prizes for raffles.
- Organizations currently funded that have not submitted all required reports or met other requirements.
- Must not employ any individual that is employed by, and must not be related to anyone employed by, the Foundation, CITGO Petroleum Corporation ("CITGO"), Petróleos de Venezuela S.A. ("PDVSA"), or any affiliate or subsidiary of the Foundation, CITGO or PDVSA; and/or the Venezuelan government. The term Venezuelan government shall be interpreted in its broadest possible meaning.
- Must not have any employees, board members, directors, officers, or agents who are members of political parties, activists in political groups, political candidates, or active members of political organizations or campaigns.

The Foundation reserves the sole and exclusive right to conclude whether an applicant may be disqualified, including for any one or more of the above reasons or categories or for any other reasons relating to its compliance and legal review.



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Annex 1. Application Questions

Organization

- Organization Name
- Organization Address
- List of Board of Directors and Officers and their work/community affiliations.
- Organization Phone
- Organization Fax
- If your organization uses a different mailing address, please update the information below with the correct mailing address.
- Organization Mailing Address
- Organization Mailing Address (line 2)
- Organization Email Address
- Organization Twitter Account
- Organization Instagram Account
- Organization Facebook Account
- Contact Email Address
- Contact First Name
- Contact Last Name
- Contact Job Title
- Contact Phone Number
- Organization Identification Number (EIN)
- Organization Mission
- Organization Accomplishments
- Primary Sources of Funding
- DUNS number
- Number of Employees/volunteers
- Is your organization applying as a fiscal sponsor?

Project Information

- Project Name
- Grant Amount Requested
- Full Program Budget
- Project Start Date
- Project End Date
- Is this an existing project?



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- Past accomplishments and impact
- Project justification
- Primary focus area
- Project summary
- Provide a short description of the proposed project.
- Please list partners (if applicable) that will participate or work on this project.
- Please describe your procurement process
- Please list any providers, if you have any
- Please provide information about program logistics
- Please include marketing plan
- Please provide information about your monitoring and evaluation plan
- Project assumptions
- What are the possible risks facing the project and how do you plan to overcome them?

Goals & Objectives

- What specifically does your organization hope to accomplish by the end of the project?
- Goals and objective of the project
- What activities and/or events will be organized as part of this project? Add expected outputs per activity
- Target number of beneficiaries impacted by this project
- Do any of these indicators apply?
 - # of adults benefitted
 - # of children benefitted
 - # of patients benefitted
 - # of pediatric patients benefitted
 - # meals distributed/nutritional formula
 - # of health providers benefitted
 - # of PPE distributed
 - # of units medicine distributed
 - # of hospitals/clinics assisted
 - # of universities/schools assisted
 - # of community centers assisted
 - # of vitamins/nutritional supplements
- Do you have any additional metrics? If so, please describe them.



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Budget Information

- Please provide an itemized breakdown of the grant amount being requested
- List the project implementation costs and administrative costs
- Will any grant funds be provided to any individuals in connection with the project? If so, please explain how the funds will be used.