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SIMÓN BOLÍVAR FOUNDATION MEDIUM TO LARGE HUMANITARIAN HEALTH 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.

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

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



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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.

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), 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.

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 317,000 Venezuelan migrants, crossed Panama's Darién Gap between January and November 2023, facing significant risks.

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 USD⁶ 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 2023.

In 2021, the Foundation supported two studies to assess the health situation in Venezuela and in the Latin America region, which provided relevant information on how the Foundation could focus its charitable activity into the most effective grant programs to fulfill its mission, with the available resources.

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

⁴ [Home | R4V](#)

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

⁶ [Home | R4V](#)



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Center for Humanitarian Health of Johns Hopkins University Study

The first study was performed by researchers of Johns Hopkins University Center for Humanitarian Health. The [Executive Summary](#) for the first study describes the key findings and recommendations. More information, including a webinar and the full report can be found [here](#):

Key Findings:

- Infant, child, and maternal mortality rates have increased in the last decade - counter to global trends;
- The primary causes of death are communicable diseases (66%), injuries (19%), and communicable, maternal, and perinatal conditions (15%);
- There has been a resurgence of communicable diseases including diphtheria, measles, malaria, tuberculosis, and HIV;
- 94% of households are food insecure with extreme rates of child malnutrition; and
- 18.8 million people have lost access to health services in both the public and private sectors.

Recommendations

- Invest in health to address both the population's urgent and widespread health needs and to mitigate the impacts of the ongoing crisis on the health system in Venezuela;
- To the extent possible, donors should support health system investments that facilitate access to primary health healthcare and services in communities. While much attention is given to hospitals, investing in primary level services is typically more cost-effective and allows larger populations to be reached; and
- In the case of Venezuela, where basic health services and medications are largely unavailable, a priority focus on primary health care is likely to best meet the needs of vulnerable populations and achieve the greatest reductions in morbidity and mortality.

Center for Disaster Philanthropy Study

The second study was performed by researchers of Center for Disaster Philanthropy, who investigated "The Dangers of Forced Displacement: Chronic and Emerging Health Needs of Venezuelans in the Americas Region." The Executive Summary for this second study also summarizes key findings and recommendations. More information including a webinar and the full report can be found [here](#):



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Key findings:

- According to the United Nations High Commissioner for Refugees (UNHCR) and the International Organization for Migration (IOM), the Venezuelan external displacement is the largest in recent history in Latin America and the Caribbean and is ongoing;
- Since the start of the Venezuelan displacement crisis in 2015, approximately 6.04 million refugees and migrants have left the country. Around 4.99 million are hosted in the Latin America and Caribbean region. Note that this figure increased to 7.2 million by December 2023;
- Deteriorating human rights conditions associated with fundamental rights has led to:
 - an 'inadequate standard of living in terms of health and well-being including food, clothing, housing, medical care and necessary social services;
 - The linchpin for displaced Venezuelans to have quality health care across the Americas is acquiring the correct legal status to access public health and other institutions;
 - For those conferred appropriate legal status, services tend to be limited to primary care in urban settings.

Recommendations:

- Invest in healthcare prevention measures and increased, specialized medical care for the displaced Venezuelan population in the Americas region;
- Focus on the health and wellbeing of women and girls;
 - Support family planning,
 - Support pregnancy/prenatal, childbirth, and postpartum/neonatal care for women and infants;
 - Support the establishment of mobile clinics in rural areas, particularly at transit locations that offer a suite of services for women and children; and
 - Support increased vaccine access;
- Focus on mental health;
- Invest as local as is possible and as international as necessary through supporting local and national NGOs; and
- Consider longer-term investments in health systems strengthening and programs to support access to appropriate legal status for displaced persons to access public healthcare systems in host countries.



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Funding Priorities:

The two studies mentioned above ratify the need to concentrate in primary healthcare, nutrition, and mental health, with special attention to mothers and children, as well as building capacity of lower-level cadres of health professionals so they can support the vulnerable population. In addition, the displacement of Venezuelans, with over 7 million having left the country in the past years, provides the opportunity to provide this support not only in Venezuela, but also in the region.

The grant program will focus on helping to address the Venezuelan humanitarian crisis through initiatives that improve access to medicines, nutrition, and healthcare for low income and vulnerable individuals and populations, in and out of the Venezuela, and in host communities.

Priority will be given to qualified organizations with a long-standing presence and demonstrated capacity to perform charitable programs in Venezuela or in the region that submit grant proposals which better target communities in need, with a special aim at reaching Venezuelans in the country, and members of the Venezuelan diaspora, in different countries, and others in need on a non-discriminatory basis.

The Foundation will consider grant proposals with charitable programs that:

- Provide access to health services and supplies with special attention to maternal and early childhood health and others in need. This may include donations of supplies, medicines, nutritional supplements, meals, information campaigns and webinars, and training for health providers and social workers;
- Create opportunities to provide food security to those in need, which is understood as having reliable access to -sufficient quantities of affordable and nutritious food. This may include food provisions, meals, and education that promote healthy eating and nutrition; and
- Develop nutrition programs designed to provide nutritious meals and supplements to the vulnerable population, emphasizing children under age 5, and pregnant and lactating women. Nutrition plans must adhere to the World Health Organization (WHO) definition of a healthy and balanced diet.

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



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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/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.



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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 number of children and adults served, number of medicines, etc.
5. Implementation time-frame
6. Strategic relationship

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 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
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 addressing 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 Project may have negative impact on beneficiaries or community 	<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
IMPLEMENTATION TIME FRAME		
<ul style="list-style-type: none"> Project can be implemented effectively in 4-6 months. 	<ul style="list-style-type: none"> Project can be implemented effectively in 2-4 months. 	<ul style="list-style-type: none"> Project can be implemented effectively in 1-2 months.



STRATEGIC RELATIONSHIP		
<ul style="list-style-type: none"> • Large and reputable organization. 	<ul style="list-style-type: none"> • Presence in a geographic area where SBF has not access. • Large and reputable organization 	<ul style="list-style-type: none"> • Ability to subaward and manage subgrants with small organizations. • Presence in a geographic area where SBF has not access. • Large and reputable organization

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 \$7.8 million in grants through the grant program, with each grant on average ranging between \$200,000 to \$1.5 million, 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 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.



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- Shipping costs and transportation of supplies to Venezuela and other countries. 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.

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.



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- 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?
- Past accomplishments and impact
- Project justification



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- 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.

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.