



SIMÓN BOLÍVAR FOUNDATION CHARITABLE GRANTS PROGRAM

The Simón Bolívar Foundation Inc. (the "Foundation"), a 501(c)(3) private foundation founded by CITGO Petroleum Corporation, announces the SBF Small Grants Program to support organizations to better meet the immediate and long-term health needs of the most vulnerable.

The Simón Bolívar Foundation serves as a catalyst to transform lives by connecting and networking community members to take community action. The SBF supports a wide range in programming and direct support—creating dividends to the benefit of the wider community for years to come.

Funding Priorities:

Priority will be given to proposals with activities targeted towards children and individuals in and from Venezuela that:

- Increase access to medicine and health-care services for low-income and vulnerable individuals and communities;
- Increase capacity of medical professionals to serve and treat patients through education and support; and
- Support education and access to preventative health care and well-being initiatives inclusive of nutrition.

The Foundation evaluates all proposals together with a Volunteer Community Advisory Team. The Volunteer Community Advisory Team is made up of leaders who have in-depth knowledge and expertise in the non-profit field and/or in an area of health. The Foundation will consider recommendations made by the Advisory Team. However, the Foundation will make all final decisions relating to the Program and grant awards, in its sole discretion.

The Volunteer Community Advisory Team reviews all proposals using established criteria per the scoring rubric included below. The criteria outlined in the rubric establish guidelines to assist Community Advisory Team members perform their independent analysis of all proposals.



The rubric is not intended to be all inclusive and additional factors may be used to qualify proposals.

Proposals will be evaluated on their ability to achieve impact in the following areas:

1. Addresses the Foundation Small Grants Program priorities
2. Budget and Cost-effectiveness
3. Project design/plan
4. Project impact
5. Innovative approach

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 3	Scores between 3 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 don't 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



INNOVATIVE APPROACH/APPROPRIATE INTERVENTION		
<ul style="list-style-type: none"> • Uses outdated approaches that have shown limited results and impact • Intervention is being addressed effectively and completely by multiple service providers and funders 	<ul style="list-style-type: none"> • Uses a commonly used approach that is successful in achieving results but does not incorporate new, innovative interventions • Continues a successful intervention already in place 	<ul style="list-style-type: none"> • Approaches a problem that can be tackled earlier in its lifecycle (or that have newer, innovative solutions) • Utilizes a highly proven successful approach • Intervention is not already being tackled effectively or enough by other funders

Application Due Date and Grant Period:

The Foundation will accept grant proposals on a rolling basis until funds are awarded and expended. The Foundation estimates one-year grant awards with an estimated beginning date of December 1, 2019 for successful candidates of the Small Grants Program. Please plan your organization’s grant activities accordingly. The Foundation reserves the right to amend the estimated dates or terminate the Small Grants Program at any time and without notice.

Grant Awards

The Foundation estimates it will award a total amount up to \$50,000 through the Small Grants Program. The majority of grant awards will be in the amount of \$5,000 per year/per organization. The maximum grant award will be \$20,000 per year/per organization. This maximum amount will only be awarded to one or a select few organizations. Funding will be available for:

- Program Implementation: Day to day management of the approved projects.
- Operation and Administrative Costs: Non-program staff salaries (i.e. accountant), utilities, rent, supply expenses and other expenses as described in the approved projects. Operation and Administrative costs shall not exceed 20% of the total approved funding request.



GENERAL ELIGIBILITY REQUIREMENTS AND EXCLUSIONS

Eligible Organizations Must:

- Submit proposals in English for program activities that address program priorities and target beneficiaries
- Certify tax-exempt status under Section 501(c)(3) of IRS Code
- Not discriminate on the basis of race, religion, creed, national origin, disability, handicap, age, sexual orientation, marital status, veteran status or any other basis prohibited by applicable law
- Must not employ any individual that is employed by (and is not a spouse or equivalent, ancestor, child or child's spouse/equivalent, grandchild or grandchild's spouse/equivalent, or great-grandchild or great-grandchild's spouse/equivalent of anyone employed by) the Foundation, CITGO Petroleum Corporation ("CITGO"), Petroleos de Venezuela S.A. ("PDVSA"), or any affiliate or subsidiary of the Foundation, CITGO or PDVSA; and/or any governmental agency with responsibility for decisions affecting the business interests of the Foundation, CITGO, PDVSA, or any affiliate or subsidiary of the Foundation, CITGO or PDVSA.

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
- 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 or raffles
- Organizations currently funded that have not submitted all required reports
- Any other areas excluded by the Foundation



APPLICATION QUESTIONS

The Foundation recommends preparing responses to the application questions below prior to starting the online application. This is provided for informational purposes only. Applications will only be considered through the online system.

ORGANIZATION INFORMATION

Organization Name:

Organization Phone:

Organization Physical Address:

**No P.O. Boxes will be accepted*

City:

State:

Zip:

Contact Name:

Contact Phone:

Contact Email:

Website:

Employer Identification Number (EIN):

Organizational Budget:

Full Project Budget:

Grant Amount Requested:

PROJECT INFORMATION

- **Project Title** (*maximum 50 characters*):
- **Is this a new/pilot or continuing project?**
- **If it is a continuing project, how long has it been in existence?**
- **Project Start and End Dates:**
- **Estimated number of beneficiaries to be impacted by the program:**
- **Description of beneficiaries:** (*maximum 250 characters*):
- **Organization Mission Statement:** (*maximum 500 characters*)
- **Project Justification:** (*maximum 1,000 characters*)
Brief summary of the need or the problem the project will address.



Why is it a priority for your organization?

- **Goals and Objectives:** *(maximum 1,000 characters)*

What **specifically** does your organization hope to accomplish by the end of the project?

- **Strategies and/or Activities:** *(maximum 1,000 characters)*

Provide a brief and general idea of how the project will be conducted. List strategies or approaches the project will follow or utilize (e.g., promote academic achievement, leadership development, educational services); and/or list the types of activities that your organization will conduct (e.g., workshops, after school programs, academic tutoring, etc.).

- **Past Accomplishments and Impact**

If this is a continuing project, please describe its impact on its beneficiaries and/or the community *(maximum 500 characters)*.

- **List accomplishments and/or successful strategies or approaches implemented by your organization that highlight how it achieves its mission (maximum 500 characters).**

- **List of Board of Directors and Officers:** *(maximum 500 characters)*

Provide a list of Board of Directors and Officers and their work/community affiliations.

- **Primary Sources of Funding:** *(maximum 500 characters)*

List the primary sources of funding for your organization and programs for the last 3 years. If available, provide the ratio of public to private funding.

Reporting Requirement for Organizations Receiving Grant Awards

Organizations who are awarded grant funds are required to report on the progress and final impact of their project as outlined in their grant agreement. Grantees will be required to report on metrics (number of beneficiaries) and provide a financial report using a Foundation template. Additional reporting requirements include:

I. Organization Information

- a. Name of Person Preparing Report
- b. Title

II. Goals & Objectives / Program Activities

- a. Please provide the goals and objectives of the Charitable Program which should reflect the goals and objectives set forth in Exhibit A of this Agreement.



- b. Please provide a short description of the implemented activities in this reporting period. Note whether planned activities have been completed. If not, please explain any delays or changes.

III. Benefits and Outcomes

- a. If applicable, please provide any information on the changes that occurred as a result of the activities and outputs, such as changes in the participants' behavior, knowledge, skills, status and level of functioning, and to what extent these changes are likely to contribute towards achieving the Charitable Program's goals and objectives.
- b. Beneficiary Feedback. If available, provide information on feedback and experiences of beneficiaries and stakeholders. Include meaningful examples that magnify the success or identify challenges with the Charitable Program.
- c. If applicable, provide information on any successes, problems, or issues faced during implementation in this reporting period. Describe how your organization will build on success or address challenges. List any lessons learned. What happened? How is learning incorporated to improve program implementation.

IV. Attachments / Acknowledgement

- a. Financial report. Download template, complete report and upload.
- b. Attach other documents to support your organization's obligations under this Agreement. Such documents may include, but are not limited to, a list of attendees for an activity, a program, flyer, brochure, and photos. Please note that any and all documents submitted become the property of The Foundation. The Foundation has the right to utilize any such documents in accordance with Section 3 of this Agreement.
- c. Acknowledgement. Certify that the information provided in the progress report is true and accurate by signing and dating the document.