



Simón Bolívar
Foundation™

SIMÓN BOLÍVAR FOUNDATION KNOWLEDGE TRANSFER, NETWORKING AND EDUCATION GRANTS PROGRAM

The 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 in programming and direct support—creating dividends to the benefit of the wider community for years to come.

In 2019 the Foundation started a process to review its mission, aiming at benefiting a larger group of individuals in need. The new 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 through education and support.
- Empowerment - Increase the effectiveness of community organizations and actors by empowering them to serve the health needs of the most vulnerable individuals in their communities, particularly children and mothers, and increase access to medicine and nutrition, thereby improving wellbeing for low-income and vulnerable individuals and communities.

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, severe deterioration of the health infrastructure and capacity in the country due to low levels of investment.

We have also learned from experts and data compiled by the UN that Venezuela's humanitarian crisis is one of the least funded humanitarian crisis in the world and the pandemic has significantly increased the already insufficient funds that have been allocated to Venezuela.

The low levels of execution of the funds that were allocated because of regulatory risks and unnecessary government bottlenecks among other factors is also very telling of the need to create awareness of the complexities of this already unprecedented humanitarian crisis in the Western Hemisphere.



Response plan/appeal snapshot for 2020

US\$762.5m total requirements of plan



US\$231.3m total funding to Venezuela, Bolivarian Republic of (2020)



US\$87.9m total requirements for the plan's COVID-19 Global Humanitarian Response Plan response



Humanitarian Response Plan 2020
Financial Tracking Service
<https://fts.unocha.org/>

Response plan/appeal snapshot for 2020

US\$762.5m total requirements of plan



US\$231.3m total funding to Venezuela.



US\$87.9m total requirements for the plan



Countries	HRP 2020	% Raised	Amount	Out of HRP	COVID-19
Yemen	3.38 bn	48.2	1.63 bn	194 m	98.0%
Congo DR	2.07 bn	34.7	717.9 m	237 m	38.0%
Afghanistan	1.13 bn	48.2	545.2 m	151 m	45.5%
Syria AR	3.82 bn	55.0	2.1 bn	431 m	47.0%

With this, the Foundation has decided to move more forcefully in implementing a new grant program (the “Grant Program”) that meets one of its stated objectives of its revised mission of “fostering knowledge transfer and capacity building; promoting education and networking”. The aim of this



grant program is to help enhance the capacity of medical professionals and caregivers to serve and treat patients in need in and from Venezuela through training in nutrition, global health practices, and disaster medicine. This program will also seek to provide financing to organizations that educate and create awareness about the complex humanitarian crisis in Venezuela.

Funding Priorities:

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

- Raise awareness of the humanitarian crisis and relevant health issues in the country or in the region;
- Train health professionals, doctors, nurses, and support personnel in and out of Venezuela;
- Retain health personnel in Venezuela; and
- Improve infrastructure of medical training facilities.

The Foundation Board members will evaluate all proposals for the Grant Program and will make all final decisions relating to the Grant Program and grant awards, in its sole discretion.

All grant proposals will be evaluated using established objective criteria per the scoring rubric included below. The criteria outlined in the rubric establish guidelines to assist the evaluators in performing their independent analysis of all grant proposals. The rubric is not intended to be all inclusive and additional factors may be used to qualify grant proposals as approved by the Foundation Board members.

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

1. Addresses the Foundation Knowledge Transfer Grants Program priorities
2. Budget – cost effectiveness
3. Project design/plan – a defined execution plan with achievable milestones and deliveries
4. Project impact – measured in terms of 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



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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
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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
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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
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Application Due Date and Grant Period:

The Foundation will accept grant proposals on a rolling basis through 2021 until funds are awarded and expended. The Foundation estimates maximum one-year grant awards. Please plan your organization's grant activities accordingly. The Foundation reserves the right to amend the estimated dates or terminate the Knowledge Transfer, Networking and Education Grant Program for any reason and at any time and without notice.

Grant Awards

The Foundation estimates it will award a total amount up to \$1,000,000 in grants through the Knowledge Transfer, Networking and Education 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. Funding will be available for:

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

Application Process:

Applicants may present grant proposals to be evaluated by the Foundation Board or any other Foundation personnel. The Foundation Board members or any other Foundation personnel will evaluate the grant proposals in accordance with objective criteria per a scoring rubric to be determined by the Foundation. Pre-approved proposals will need to complete the Foundation's application using the Versaic system, which includes detailed information about the organization (e.g., experience, funding, list of directors and officers). Pre-approved organizations will be subject to the Foundation's full due diligence process in accordance with the Foundation's standard procedures and applicable laws.

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, or be related by blood or marriage to, any individual who is employed by: (i) 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



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(ii) the federal, state or local government of Venezuela. The term government of Venezuela as used herein shall be interpreted in its broadest terms and meaning.

- Satisfactorily complete the Foundation's legal and compliance due diligence
- Enter into a Grant Agreement with the Foundation and meet any other requirements of the Foundation

Funding Exclusions for Grant Programs:

Eligible organization shall formally declare, and shall be willing to accept contractual obligations not to use any of the grant funds for:

- 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 political 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 and other documents
- Any other areas excluded by the Foundation in its sole discretion