

Nonprofit Space Stabilization Program Technical Assistance Guidelines



Community Vision (formerly the Northern California Community Loan Fund) announces the availability of technical to stabilize the real estate of San Francisco nonprofits. Technical Assistance services can include: financial planning, space planning, identifying/evaluating potential sites, assistance in lease negotiations, developing construction budgets and project timelines, and analyzing potential funding sources. Technical assistance services may be provided on a one-to-one basis and/or in workshop settings.

Applications for Technical Assistance will be accepted on a rolling basis and approved/declined within 45 days.

This initiative, the Nonprofit Space Stabilization Program (NSSP), is aligned with the Nonprofit Sustainability Initiative (NSI). The NSI deploys financial assistance, professional services, assessment tools and other resources to help stabilize nonprofits and overcome barriers to growth. The underlying objective of all NSI programs is to ensure access to quality of life resources as well as education, health and human services for residents of San Francisco. Community Vision administers real estate and financial sustainability initiative programs within the NSI as a multi-agency partnership between the Office of Economic and Workforce Development, the Mayor's Office of Housing and Community Development, and the San Francisco Arts Commission. Since 2017, the NSI has supported acquisition and long-term leases for 231,160 square feet in San Francisco.

Priority Criteria

Priority will be given to nonprofit organizations that

- Are deeply rooted in low-income and historically underserved community(ies)¹ in San Francisco,

¹ Using both the Cultural Equity Endowment Legislation and the Grantmakers in the Arts "Racial Equity: Statement of Purpose," historically underserved communities include: African, Latino(a), Asian, Arab, Native American, Pacific Islander, LGBTQ, People with Disabilities, and Women. Using the Community Development Block Grant eligibility guidelines, a low- and moderate-income person as a member of a family that has an income equal to or less than the Section 8 low-income limit established by HUD. Organizations that exclusively serve the following groups, presumed to be low-income, may also qualify: Abused Children, Elderly Persons, Battered Spouses, Homeless Persons, Severely Disabled Adults as defined by the Census Bureau, Illiterate Persons, Persons living with AIDS, and Migrant Farm Workers. HUD income limits are available at: <https://www.huduser.gov/portal/datasets/il.html>

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- Are facing significant financial constraints² within the nonprofit sector but have secured recent public or philanthropic investment,
- Can demonstrate support for their efforts from multiple sectors,
- Clearly identifies how new clients and/or audiences will be acquired and existing beneficiaries served effectively by the proposed space including administrative or office space, with a focus on retaining or engaging historically underserved communities, and
- Can demonstrate evidence of planning to identify and mitigate financial risk³.

Program Eligibility Requirements

- 1) In order to be eligible to receive technical assistance, the applicant must meet all of the following criteria:
 - a) Be facing permanent displacement in the next 18 months, or barriers to growth due to real estate constraints
 - i) Risk of displacement may include a lease that expires in the next 18 months, a month-to-month lease, lack of site control, or other conditions putting the organization in imminent risk of losing office/program space.
 - ii) Organizations facing barriers to growth will be asked to provide a financial plan showing the financial and programmatic impact of increased space.
 - b) Be incorporated and in good standing as a tax-exempt, 501(c)(3) corporation or a fiscally sponsored project of a tax-exempt corporation that is operating for purposes consistent with Section 501(c)(3) status.
 - c) Demonstrate financial accountability by submitting the organization's Form 990 for the most recent tax year.
 - d) Demonstrate financial accountability by submitting the organization's audit or IRS Form 990 for the most recent three fiscal years (if unavailable, balance sheet and income statement), budget for the current year, and year-to-date income statement and balance sheet. Arts and Cultural organizations may submit financial data from DataArts (formerly Cultural Data Project).
 - i) City contractors participating in the City's joint monitoring process must submit copies of their Fiscal and Compliance Monitoring Reports for the past three years.

² Business models that constrain organizations ability to generate unrestricted operating revenue.

³ These documents can include: multi-year operating projections that include contributions to a capital reserve, Executive Director succession plan, Board approved governance policies, and a Board approved policy for making contributions and withdrawing funds from organizational reserves.

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- e) Have an established track record of providing direct or indirect⁴ services to members of low-income and historically underserved community(ies) in the City and County of San Francisco for at least the past three years. Organizations will be asked to provide:
 - i) Evidence that the organization's mission and/or programs clearly identifies and prioritizes low-income and historically underserved community(ies).
 - ii) Documentation that the organization has a mechanism for program beneficiaries (primary and/or secondary⁵) to provide input that informs the organization's governance.
 - iii) Description of primary and/or secondary beneficiaries (clients, audiences, participants)
- f) List of clients and neighborhoods served annually. Clients served should include primary and secondary clients.
- g) Must be located in San Francisco County.

TA Recipient Expectations:

If an organization receives a technical assistance award, the following requirements are expected:

- The TA recipient must designate a contact person.
- TA recipients will be expected to respond to all correspondence and communication from Community Vision within 5 business days.

TA Program Policies

- Organizations that require membership in a certain religion or advance a particular religious faith are ineligible to apply. Faith-based organizations may be eligible if they welcome and serve all members of the community regardless of religious belief.
- Independent schools are ineligible to apply.

⁴Within the context of the Nonprofit Sustainability Initiative, indirect service refers to the provision of skills, knowledge, advocacy, and services with the intention of supporting a community or an organization(s) ability to fulfill its mission.

⁵ Primary clients receive the bulk of services or resources. Secondary clients receive minor services or are impacted through the ripple effect of the organization's work. (For example, a Counseling Agency's primary clients could be youth receiving counseling services and its secondary clients could be family members that receive minor support services. For a Capacity Building Agency, primary clients could include nonprofit staff & board members registered for workshops and secondary clients could be clients served through the nonprofits that are supported.)

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Applications are available at: <https://www.communityvisionca.org/sfsustainability/>

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