

TOWN OF LOS GATOS — COMMUNITY GRANT PROGRAM Application Eligibility and Scoring Card (Proposed)

Applies to all Community Grants — Sustaining and Competitive One-Time

Draft for Finance Commission consideration · August 2026

What these forms are for. Eligibility exists to identify organizations that are run well enough to be trusted with public money. It does not exist to screen out organizations that are small, informal, or imperfectly documented. A charity with no paid staff, no audit, and a plain set of board-approved internal financial statements can pass every item. An organization that cannot say who its directors are, has let its state registration lapse, lets one person both approve and pay its own bills, or never accounted for the Town's last grant, cannot. Where a deficiency is the absence of a document that exists, it is curable; where it reflects how the organization operates, it is not.

How they fit together. Form A-1 is completed by the applicant and returned with the application, signed by two officers under penalty of perjury. Form A-2 is completed by staff, once per applicant, before any application is released for scoring; an applicant that does not pass is not scored, and an item found not met after scoring begins withdraws the application from the cycle. These forms apply to every Community Grant applicant — sustaining and competitive one-time alike. A sustaining recipient completes Form A-1 and is determined on Form A-2 each cycle, and is scored on Form B, even though its award is not competed. Neither Form A-1 nor Form A-2 is distributed to scorers. A false certification disqualifies the application at any point in the cycle and is grounds for termination of any agreement and repayment. Form B is completed separately by each scorer for each eligible applicant and is the only instrument that evaluates merit. Inspection of records, repayment of misspent funds, and the bar on assignment without prior written Town consent are provisions of the grant agreement and are not certified here.

FORM A-1 — APPLICANT ELIGIBILITY CERTIFICATION

Completed by the applicant and returned with the application. Signed by two officers under penalty of perjury.

FY: _____ Organization: _____ EIN: _____ Amount: \$ _____ Grant type: Sustaining ☐ Competitive ☐

What you are certifying	Your entry
SECTION 1 — LEGALLY ABLE TO RECEIVE THE MONEY	
• IRS. Attach your current determination letter under section 501(c)(3), or state another exempt classification. • Secretary of State. Active status, with a current Statement of Information on file. Nonprofit corporations file Form SI-100 biennially. • Registry of Charities and Fundraisers. Registered, status Current — the only accepted status. Delinquent, suspended, revoked, and not appearing at all are each disqualifying. • Annual filings. Every charity files an RRF-1 each year. Attach it and the return for your size: under \$50,000 — 990-N and CT-TR-1; \$50,000 to under \$200,000 — 990-EZ; \$200,000 or more, or assets of \$500,000 or more — 990; a private foundation — 990-PF. • The 990-N postcard is not sufficient on its own. It reports no revenue, expense, or asset figures, so the CT-TR-1 is the financial disclosure the Town relies on and must accompany it. Nor is 990-N the correct return at \$50,000 or more in gross revenue — attach the 990-EZ or the 990. A 990-N filed alongside reported revenue of \$50,000 or more is treated as a filing not made. • CT-TR-1, where it applies. Complete and signed — no line blank or zeroed without explanation, Part B schedules attached, signed under penalty of perjury by an officer — and shown on the Registry as Accepted. Filing is not enough: a Not Accepted status does not count as filed and is disqualifying until an amended form is accepted. • Purpose. The activity you are asking the Town to fund falls within the exempt purpose stated in your organizing documents.	Determination letter attached ☐ Classification: _____ SOS entity no.: _____ Statement of Information filed: _____ through: _____ Registry CT #: _____ Status: _____ Gross revenue, last FY: \$ _____ Filing class: 990-N ☐ 990-EZ ☐ 990 ☐ 990-PF ☐ If 990-N: CT-TR-1 attached ☐ Revenue matches class ☐ RRF-1 for FY _____ attached ☐ Return attached ☐ Type: _____ FY: _____ CT-TR-1: N/A ☐ Complete and signed ☐ Accepted ☐ Funded activity is within our exempt purpose ☐
SECTION 2 — GOVERNED BY A REAL BOARD	
• Roster. Attach a roster of every voting director and officer — full name, office held if any,	Roster attached, independents marked ☐

What you are certifying	Your entry
date the current term began. Mark each independent director with an asterisk. • Independence. Independent means: (a) not an officer or employee; (b) no compensation in any capacity, including as a contractor; (c) no financial interest in a material transaction with the organization; (d) not a household member of, or related to, any officer or employee. An officer is never independent. • Composition. At least three voting directors, a majority of them independent. A director not marked with an asterisk is not counted. • Conflict of interest. Attach the adopted written policy itself; certifying that one exists is not enough. Each director makes an annual written disclosure under it. No policy, or a policy not submitted, is disqualifying.	Voting directors: _____ Officers: _____ Independent (marked): _____ Majority independent: Yes ☐ No ☐ Conflict-of-interest policy attached ☐ Date adopted: _____ Most recent annual director disclosures: _____
SECTION 3 — CAN HANDLE THE MONEY AND ACCOUNT FOR IT	
• Separation of duties. No expenditure is approved and disbursed by the same individual, and no one person both prepares and certifies your grant reports. • Reconciliation. Bank statements are reconciled, and the reconciliation is reviewed by someone who neither signs checks nor initiates transfers. • Fiscal policies and tracking. Written adopted fiscal policies, and Town funds tracked separately from other funds. • Financial statements. Attach your most recent statements and state the level. An audit is not required. • Reporting. Name the individual accountable for the final report and expenditure record. Receipts and invoices retained; five-year retention obligation met. • Prior Town grants. If previously funded: reports on time, funds spent within the period and for the approved purpose, unspent funds returned.	Approval and disbursement are separated ☐ Report preparation and certification are separated ☐ Reconciliation reviewed independently ☐ Written fiscal policies ☐ Town funds tracked separately ☐ Statements attached — level: Audit ☐ Review ☐ Compilation ☐ Board-approved internal ☐ None ☐ FY: _____ Responsible individual: _____ Title: _____ Receipts retained; five-year retention ☐ Prior Town grant: None ☐ FY _____ All prior obligations met ☐
SECTION 4 — DISCLOSURES	
• Passthrough. State whether any other entity will receive, hold, or disburse any portion of the funds, or exercise discretion over how it is distributed. If so, name it, give the amount and the basis, and have it complete Sections 1 and 2 for itself. • Town relationships. State whether any officer, director, employee, or agent — or a household member — is a Town official, officer, employee, or commissioner. An affirmative answer does not disqualify you and is not shown to scorers.	Passthrough: None ☐ Disclosed ☐ Entity: _____ Amount: \$ _____ Basis: _____ Entity Sections 1 and 2 attached ☐ Town relationship: None ☐ Yes ☐ Person: _____ Role with us: _____ Town position: _____

WHAT WILL NOT DISQUALIFY YOU. *Recorded and disclosed to the Council with the recommendation. None is a bar.*

- **No audit, and no paid staff.** Board-approved internal financial statements satisfy Section 3, and an all-volunteer organization can pass every item.
- **A small budget, or a first-time applicant with no Town grant history.** (Section 3)
- **A Town relationship disclosed under Section 4.** This triggers disclosure and recusal on the Town's side; it is not a defect in the applicant.
- **A missing document produced within five business days of written notice.** The application is held, not withdrawn.
- **A disclosed passthrough.** Disclosure is required and is not itself adverse; the arrangement needs written Town consent before execution.

CERTIFICATION. We certify under penalty of perjury under California law that this form and its attachments are true, complete, and correct.

Officer 1 — name and signature: _____ Officer 2 — name and signature: _____ Date: _____

FORM A-2 — STAFF ELIGIBILITY DETERMINATION

One per applicant. Completed by staff before applications are released for scoring. Not distributed to scorers.

Applicant: _____ Grant type: Sustaining ☐ Competitive one-time ☐ Application number: _____ Date received: _____
 Form A-1 received and complete: Yes ☐ No ☐

Amount requested: \$ _____ Program cap this cycle: \$ _____ A request exceeding the cap must be conformed in writing before scoring; an unconformed request is not released for scoring. Conformed ☐ N/A ☐

#	What staff verify — and what ends the application	Finding
1	Legally able to receive the money. Confirm the applicant appears on the Attorney General's Registry of Charities and Fundraisers and that its status is Current; check filing history there; entity status and the Statement of Information against the Secretary of State; that the RRF-1 and the return for the applicant's size are attached and current; that the figures in the application match the most recent filings; and that the funded activity is within the stated exempt purpose. A 990-N postcard is not sufficient documentation on its own: it carries no financial figures, and it is the correct return only below \$50,000 in gross revenue. Where a CT-TR-1 applies, confirm the Registry shows it as Accepted. Disqualifying: <i>not appearing on the Registry of Charities and Fundraisers, or any Registry status other than Current — delinquent, suspended, and revoked are not accepted; a missing or delinquent filing; a 990-N submitted without a complete, signed CT-TR-1; a 990-N where reported gross revenue is \$50,000 or more, which is a filing not made; a CT-TR-1 that is incomplete, unsigned, inconsistent with the application, or shown on the Registry as Not Accepted, until an amended form is accepted; a contradiction with a sworn filing that the applicant does not resolve in writing; a funded activity outside the stated exempt purpose, unless an amended statement of purpose is adopted before award.</i>	Met ☐ Not met ☐ Registry status: Current ☐ Other ☐ Not listed ☐ Status recorded: _____ Filings current ☐ Delinquent ☐ Return matches revenue reported ☐ If 990-N: CT-TR-1 attached ☐ CT-TR-1: Accepted ☐ Not Accepted ☐ N/A ☐ Reconciles ☐ Contradiction ☐ Date checked: _____
2	Governed by a real board. Reconcile the roster against the Statement of Information and the most recent Form 990-series return. Count only directors marked independent on the roster. Confirm the conflict-of-interest policy is attached and read it. Disqualifying: <i>fewer than three voting directors; no independent majority on the filing date; or no adopted written conflict-of-interest policy, or a policy the applicant does not submit with the application. None of these is curable within the cycle — not by explanation, by a resolution adopted after filing, or by a commitment to act before the agreement is executed.</i>	Met ☐ Not met ☐ Directors: _____ Independent: _____ Majority independent: Yes ☐ No ☐ COI policy attached ☐ Not attached ☐ Roster reconciles ☐ Discrepancy ☐
3	Can handle the money and account for it. Read the certification on its face, review the financial statements submitted, and check prior grant compliance against Town records. Disqualifying: <i>approval and disbursement of an expenditure by the same individual; one individual both preparing and certifying grant reports; or an unresolved default on a prior Town grant. The absence of an audit is not disqualifying.</i>	Met ☐ Not met ☐ Statements: Audit ☐ Review ☐ Compilation ☐ Internal ☐ None ☐ Prior compliance: Met ☐ Not met ☐ First-time applicant ☐
4	Disclosures. Verify any named passthrough entity against items 1 and 2 of this sheet. Refer an affirmative Town relationship to the Town Attorney before the recommendation goes to Council. Disqualifying: <i>a passthrough to an unnamed entity, or to one that cannot itself satisfy items 1 and 2.</i>	Met ☐ Not met ☐ Passthrough: None ☐ Disclosed ☐ Entity items 1 and 2 verified ☐ Town relationship: Negative ☐ Affirmative ☐ Referred to Town Attorney: _____

ELIGIBILITY DETERMINATION Eligible — release for scoring ☐ Eligible subject to written resolution of item(s) _____ ☐ Not eligible — not scored ☐

Reason (required if other than “release for scoring”): _____

Determined by: _____ Title: _____ Signature: _____ Date: _____ Second reviewer (required for any determination other than “release for scoring”): _____ Date: _____

Reconsideration by the Town Manager may be sought in writing within five business days. Determinations are records of the award proceeding.

FORM B — SCORER'S CARD

One per scorer, per eligible applicant. Complete Part 1 before reading the application.

Applicant: _____ Scorer: _____ Fiscal year: _____

PART 1 — SCORER'S DECLARATION (complete before scoring)

I have reviewed the applicant organizations in this cycle. Except as noted below, I have no relationship with this applicant — including service as an officer, director, employee, or agent of the applicant, or such a role held by a member of my household — that requires disclosure or recusal under Council Policy 2-04, Government Code sections 1090 and 1091, or the Political Reform Act. I have not conferred with any other scorer about the scores on this card.

Relationship declared (state the applicant and the relationship; attach a sheet if needed):

A declared relationship must be stated publicly and entered in the Town's official records before any action on the award. I abstain from scoring and from any vote on this applicant unless the Town Attorney advises otherwise.

None to declare ☐ Relationship declared above ☐ Signature: _____ Date: _____

PART 2 — MERIT SCORING

Award one whole number from 0 to 5 for each of the eight criteria. All eight are weighted equally. Where a band spans two points, the italic note states the condition for awarding the higher of the two. Score each criterion independently of the others and independently of the amount requested.

Criterion	5 — Exemplary	4-3 — Good	2-1 — Passable	0 — Not demonstrated or adverse	Score
1. Project overview	Proposal clearly explains the project and its scope, steps, methods, and intended results with logical and systematic detail.	Proposal adequately explains the scope, steps, methods, and intended results in general terms. <i>Award the higher point when all four elements are present and only the level of detail is general.</i>	Proposal explains the general scope and intended results but lacks detail of the project steps and methods. <i>Award the higher point when steps or methods are partially described rather than absent.</i>	Proposal lacks sufficient detail to convey the scope or intended results of the project.	____ / 5
2. Advancing new ideas or surmounting new (non-financial) challenges	The project clearly represents implementation of a new insight or idea that has not been piloted previously, or surmounts a new (non-financial) challenge facing the organization.	The project clearly represents implementation of an emerging innovation or trend that has been piloted in other communities but will be new to the Los Gatos community. <i>Award the higher point when the applicant identifies the source community and states what it will adapt.</i>	The project represents the adoption of a change, addition, or variation to an already established program for the Los Gatos community. <i>Award the higher point when the change is substantive and specifically described rather than incremental.</i>	The project continues an already established program or service verbatim, or the proposal lacks information or evidence to suggest that it is a new project or service.	____ / 5
3. Community impact	Target audience or population clearly and specifically defined. Strong presentation of meaningful positive impact, supported by specific local evidence or data establishing	Target audience or population reasonably well defined. Sufficient presentation of meaningful positive impact, supported by general evidence	Target audience or population very broadly defined. Presentation of positive impact rests on realistic assumptions despite gaps in evidence.	Target audience or population not sufficiently defined or too broadly defined. Proposal lacks demonstration of meaningful impact.	____ / 5

Criterion	5 — Exemplary	4-3 — Good	2-1 — Passable	0 — Not demonstrated or adverse	Score
	the need.	or data establishing the need. <i>Award the higher point when the evidence is the applicant's own service data rather than general or third-party sources.</i>	<i>Award the higher point when the assumptions are stated explicitly and are testable.</i>		
4. Direct benefit to Los Gatos	Project is highly local and specifically targets the incorporated Los Gatos community, whether or not the organization is based in Los Gatos.	Project is regional but specifically targets expansion into the incorporated Los Gatos community, or shows significant benefit to it. <i>Award the higher point when a Los Gatos service level, participant count, or comparable commitment is stated rather than intent alone.</i>	Project is regional. Evidence is offered for how the incorporated Los Gatos community will benefit, or the wide regional audience indicates only indirect benefit. <i>Award the higher point when the benefit to incorporated Los Gatos is direct and evidenced rather than indirect.</i>	No identifiable benefit to the incorporated Los Gatos community, or the proposal does not address Los Gatos benefit.	____ / 5
5. Budget analysis	Strongly detailed and realistic budget with sound use of funds. Any funding necessary above the limit of the grant is both accounted for and secured through commitments from other means.	Realistic budget with general detail showing responsible use of funds. Any funding necessary above the limit of the grant is accounted for with reasonable certainty or commitment. <i>Award the higher point when other funding sources are identified by name rather than by category.</i>	Budget generally appears to support the project activities as described, although there are gaps in detail. Applicant has a realistic opportunity to secure funding above the limit of the grant even if commitment is not certain. <i>Award the higher point when the gaps are in line-item detail rather than in the funding plan.</i>	The described proposal is not supported by the budget, or no reliable source of funding is presented for any necessary funding beyond the limit of the grant.	____ / 5
6. Feasibility and organizational capacity	Superior experience or knowledge in the field as it relates to completing the project. Project, personnel, resources, and timeline are realistic and congruent with the description and outcomes. Staff or volunteer capacity is sufficient for the scale proposed.	Adequate experience or knowledge in the field, or transferable expertise in a related field. Deficiencies or overestimations in project, personnel, resources, or timeline fall within a tolerable range. Outcome appears achievable despite some gaps. <i>Award the higher point when personnel are named and assigned rather than described by role alone.</i>	Gaps in experience or knowledge, but the applicant demonstrates it can reasonably bridge them. Project, personnel, timeline, or resources expose weaknesses that will leave gaps. Achievement is questionable at the level proposed but likely at a smaller level. <i>Award the higher point when the applicant itself identifies the reduced scope at which the project is achievable.</i>	Applicant does not demonstrate the experience or knowledge to complete the project, or there is insufficient information about personnel, resources, project, or timeline to gauge feasibility.	____ / 5
7. Assessment and evaluation	Clear definition of the success of the program. Clear picture of	Good understanding of the anticipated specific results of	Success is difficult to ascertain — flawed by untestable	Evaluation plan missing or	____ / 5

Criterion	5 — Exemplary	4-3 — Good	2-1 — Passable	0 — Not demonstrated or adverse	Score
	how data will be collected to demonstrate the degree to which outcomes are met.	success, but the plan lacks detail about data or methods. <i>Award the higher point when the anticipated results are stated in measurable terms.</i>	outcomes, inappropriate methods, or lack of useful data collection. <i>Award the higher point when at least one measurable outcome is identified.</i>	unusable.	
8. Commitment to diversity, equity, and inclusion	Efforts are specifically demonstrated and articulated both at the organizational level and within the scope of the proposal, with identified practices rather than statements of principle.	Efforts are specifically demonstrated and articulated at the organizational level, although not within the scope of the proposed project. <i>Award the higher point when organizational practice is documented — an adopted policy, board or staff composition, or an outreach record — rather than described narratively.</i>	Impacts or commitments are expressed in general terms at either level. <i>Award the higher point when the proposal identifies the populations intended to benefit.</i>	The proposal does not address a commitment to diversity, equity, and inclusion at either the project level or the organizational level.	____ / 5

PART 3 — BONUS: ALIGNMENT WITH COUNCIL STRATEGIC PRIORITIES

Two bonus points are awarded to a project that specifically meets one or more of the Council Strategic Priorities in effect for this grant cycle. A maximum of two points may be awarded regardless of how many priorities the project meets. Name the priority relied on in Part 4; a bonus awarded without a named priority is not counted.

Council Strategic Priorities in effect for this cycle [replace this list with the priorities adopted for the applicable cycle before the card is issued]:

Emergency Preparedness ☐ Fire Protection ☐ Community Where Older Adults Thrive ☐ Events or Town-Wide Efforts ☐ Community Engagement ☐
Environmental Sustainability ☐ Support the Needs of Unhoused Residents ☐

Note. Diversity, equity, and inclusion is scored as Criterion 8 and is not separately eligible for a bonus. Under the prior rubric the same subject could earn points twice on one dimension.

PART 4 — SCORE SUMMARY AND BASIS

Enter each score below and state the basis for any 5, any 0, and any bonus awarded. A required entry left blank returns the card to the scorer.

Criterion	Score	Basis for the score — required for any 5 or 0, and for any bonus awarded
1. Project overview		
2. Advancing new ideas		
3. Community impact		
4. Direct benefit to Los Gatos		
5. Budget analysis		
6. Feasibility and capacity		
7. Assessment and evaluation		
8. Diversity, equity, and inclusion		
Bonus — Council Strategic Priority		Priority relied on (name it; a bonus with no priority named is not counted): _____

MERIT SUBTOTAL _____ / 40 BONUS _____ / 2 TOTAL _____ / 42 Scorer signature: _____ Date: _____

PART 5 — RULES FOR USING THE SCORES

- Each application is scored independently by each scorer. Scorer do not confer before submitting their cards.
- The final score for an application is the mean of the submitted scorer totals, carried to one decimal place. Cards from a scorer who declared a disqualifying relationship are not included.
- A score of 0 on a single criterion does not by itself disqualify an application. An application scoring 0 on Criterion 4 (Direct benefit to Los Gatos) is not recommended for funding.
- Recommended funding threshold: _____ points out of 42. Applications below the threshold are not recommended. The threshold is set by the Council or the reviewing body before applications are scored, not after.
- Ties are broken first by the mean score on Criterion 4 (Direct benefit to Los Gatos), then by the mean score on Criterion 3 (Community impact).
- Use of the score. The ranked list produced by these cards is the basis for the funding recommendation forwarded to the Council. Where the Council has adopted an allocation structure that distributes funds by formula rather than by rank — for example, an equal division among a fixed number of providers — staff shall state that in the recommendation and identify which awards are set by formula and are therefore not determined by these scores.
- Award amounts. A score does not by itself set an award amount. Where the recommendation is for less than the amount requested, staff shall state the basis for the reduction.
- Records. Completed Form A determinations and Form B cards, including Part 1 declarations, are retained as records of the award proceeding and are subject to disclosure under the Public Records Act to the extent required by law.