



The Four Way Foundation's Community Grants deadline is April 1 for up to \$10,000 for capital needs (March 1 for Rose Douglas grants.) Packets should be **emailed** to fourwaycommfdn@gmail.com by 5 pm. *We no longer accept paper!*

Here are some questions and answers about our grant process.

(Our theme for today is "case by case basis.")

What kind of document format should I use?

We really prefer all one PDF, in the order given, but if that has you flummoxed, separate PDFs are fine. Word docs are fine, too. It sure would be nice if the document title had YOUR name on it instead of ours! Sorting fifty packets titled "Four Way" is not fun.

How long or comprehensive should my cover letter be?

That depends. One page is best. If we know your organization, it can be quite brief. No one has to convince Four Way about the importance of libraries, for instance, so we don't need a long narrative or a page of persuasive statistics there. However, if your group is new to us and the approach is innovative and bears explaining, do use more ink to tell us why your work makes a difference and why this grant will help.

What are my chances of being funded by the Four Way Community Foundation?

Probably quite good. In 2023, 52 community grant applications were received and 43 were funded (though not all in full), with an overall granting rate of 87% of funds requested. Your chances are pretty good if:

- You are serving people in our service area and the capital project will be done here.
- You are in good standing with us.
- Your project seems to our board to be important to our community.
- We have adequate funds available.

Might we be offered partial funding?

There will be more requests than the board can fulfill. A few terrific projects will get passed over. Sorry. Also, some projects may be offered partial funding. Be prepared to tell us if, and when, you could complete your project with partial funding.

When will I hear back about my grant?

First, we'll confirm that we received it.

If we notice any elements missing, or if we anticipate any obvious board questions not answered in the proposal, we'll call or email. The board will review proposals in their April meeting, and members will choose "site visits." After that April meeting, projects not advancing will be notified.

You will get a call to schedule a site visit, which may be in person or on a phone or video call. The board, in its May meeting, will finalize selections and amounts. A second mid-May meeting may be needed. Grant award notifications will be made in mid-late May.

Checks are mailed in late May or early June.

It is OK to call us and check on the timeline, once or twice, but please refrain from lurking in the trees outside our office, thanks.

Will you do a site visit?

Yes! If your application makes it into full consideration, we will come see you. Our board absolutely LOVES site visits because that's where they get to know you and your fine work. You do not have to "put out the good towels" for us. We just want to meet you and get excited about your organization and your project, and ask more in-depth questions face to face.

If our project is not funded, will you tell us why?

Yes! Projects denied will receive notice, and you may ask lots of questions about that. We'll do our best to explain any shortcomings in your proposal. But it may have been great and still not funded. That happens to about six proposals each year. We don't like it, either.

How do I fill out this part about tax-supported revenue?

If your organization does not receive direct public (tax derived) money, just put "n/a". If

you are a public school or tax-supported entity, your financial folks should know what percentage to enter.

What do you want to see in our organization's financials?

Show our board a snapshot of your group's financial picture but don't reinvent QuickBooks. Your most recent profit & loss or income & expense report will be fine.

What do you like to see as a "match"?

We do not have a set requirement here. We like to see that your group cares enough about this project to allocate some of your resources to it. Since Four Way grants are capital, you might be paying for part of the purchase cost, or perhaps the labor involved, project coordination, or noncapital aspects (i.e. "Please buy us new computers and we are paying for all of the software, IT help, and an electrical upgrade.")

Do you require a "logic model"?

No. You're welcome. Also, there's no need to load us up with demographics about Josephine and western Jackson counties. We live here, too. We're clear on the intersectionality of entrenched poverty and rural isolation. Take a load off.

Does last year's report need to be in before we apply for this year?

Yes! We're so glad you asked! The application deadline is April 1, and if you'd like funding for this year, the reporting deadline also becomes April 1. (Don't make us chase that down, please!) You got your report in months ago? Great! Mention that in your email with the application because our valiant office assistant would like to know before she looks it up. And, it's OK to get the 2024 application in on, say, March 15, so we can alert you to any issues, and then send the 2023 report on, say, March 30. Just let us know that's your plan. We won't officially "OK" your application for board review until we get the report. (If you are not requesting new funds, reports are due June 1.) P.S. Recently a grantee noted that it felt a bit unfair to have only ten months to compete the project. We sympathize, but the time gap is the "downside" of year-over-year funding. Sorry.

Our grant was awarded but will be "held." What does that mean?

That means we will hold the money until you are ready to request the payment. Perhaps there are other funds you must receive before you can begin the project, or you are finalizing other paperwork, or need to complete some construction before the phase we funded can happen. Rather than take the chance that you will need to return the grant,

we issue a commitment and hold the funds for you.

This year kicked our butts. Will we be able to get an extension?

Probably, yes. We really don't like extensions, and yet, they are sometimes necessary. Fill out the extension request form and, if needed, add a cover letter with more detail. We'd love to see a renewed timeline, too.

If we have an extension on our previous grant, may we also submit a new one?

Nope. Nopity nope nein nyet no. Sorry.

I'm not sure we can complete this project in one year. Should we apply?

Get sure. Assemble the team. Make a timeline. Plan to have expended the Four Way portion of your project by June 1. We do not love extensions. *Unless* (see next question...)

Our project is ambitious and needs more fundraising and we're looking for "first in" funds from Four Way as an anchor for other grants.

OK, tell us that. We may elect to award funds and supply a letter of support, but we'll hold the funds until you are ready. We may formally agree to hold them longer than one year.

We are not a 501c3. May we use an "umbrella" group?

It depends. If the "umbrella" group is a true partner, mission-aligned, and committed to your success, then yes, and then *they* are the group applying. If it's a "borrowed" umbrella, indifferent to your group and its work, no. Cuz, that's really almost tax fraud. We're hip to it. Be prepared to have your umbrella group's board go to bat for you and your work.

We are part of a school district. What is your policy on how many schools in a district may apply?

We have a detailed policy, please request it from us. It boils down to: one Community Grant and one Rose Douglas grant per District per year, and charter schools or booster

clubs with their own 501c3 are independent of that limit. Again, the board reserves the right to make exceptions.

We were funded in 2021, 2022, and 2023. May we apply in 2024?

No. This will be your rest year. Our Community Grants Program has a “three years in, one year out” policy. This requirement does NOT apply to the Rose Douglas grant program.

Our request was denied in 2022. Does that count as a rest year?

Yes, it does. (See, there was a bright side after all.)

We were under a partner umbrella last year, and now we have our own 501c3. Who takes the “year off”?

Whoever’s name and tax I.D. number went with the check, so, the umbrella group. Congratulations on your new-found independence! Like any proud parent, your former umbrella paid a price to birth you. Remember them on Mother’s Day.

What do you mean by Minutes?

We need to see the documentation of your board secretaries' official recording of the events of the board meeting that show where the motion was passed to approve of the grant application. If you’re still not sure, please sign your board up for FREE Board Service Training with Kate.

Our board meets only quarterly and it’s too late to get the grant proposal approved in the minutes. What do we do?

We will accept a signed letter from the board president **and** the treasurer. (Yes, **both**.) And here’s why we need it: Many of the groups we fund are small, scrappy and valiant and they do vital work. But they may also have a lot of staff turnover. Or, they are enormous (like a school district,) and small grants can get “lost.” We want to be sure the board leadership and financial buck-stop folks at every organization are well aware of the project, the grant request, and the restriction on any funds awarded. So this approval is an absolute requirement. We would **prefer** to see that it’s been approved by a formal motion of your board. But the signed letter will suffice.

What is your definition of “capital”?

Ah, such a fertile question, and one we enjoy dissecting endlessly! Here are some examples that are clear:

Wheelchair access ramps, office furniture, durable equipment, interpretive signage, computers, parking lot paving, fencing, security systems, outbuildings, choir risers, vehicles, and walk-in coolers. Here are some that are subject to debate:

Painting a building, repairs that are more “maintenance” (cost of doing business/operational) and less “improvements” (capital,) upgraded software packages to go with new computers, etc. How do groups know? They ask ahead of time. And then our board discusses it. We care about case-by-case attention to your needs, and we try not to make hard-and-fast rules for grey areas. So ask. But no, your donor development software subscription is not capital. Nice try.

Grants from the Rose Douglas Trust to benefit nonprofits that serve individuals with intellectual or developmental disabilities are not restricted to capital.

We lease our building, and we want to improve it. Should we apply?

Yes! Our board will want to discuss your lease agreement and how long our investment in your program will benefit your clients. Consideration will be given to your landlord’s intentions and the nature of the improvements. If you are looking to purchase durable equipment that will be installed, we may seek a written agreement with your landlord that the equipment belongs to you and not the building. We will probably say no, however, to items like a storage shed built for your use on the private property of one of your board members. Again, case-by-case. So call us.

We are seeking durable equipment but our program may have a limited duration. What if we lose our other program funding?

Sometimes it happens that a well-designed program is awarded durable items by Four Way and then, for whatever reason, the program ends. Upon the award of your grant, you will be asked to sign an agreement that we may require durable items to be transferred to another nonprofit if they have a lot more life in them but will no longer be used for your mission. For instance, recently a group closed their food pantry after two years, and Four Way requested the transfer the refrigerators we provided to another local food pantry, which they did.

What other agreements will we need to sign if funded?

You will be asked to have TWO people sign a basic contract agreeing that the funds are restricted for the stated purpose, etc. You need two signatures because we care about your internal controls process and it's a best practice. If you'd like to see the contract before you begin the grant process, we're happy to send you a copy.

We had to return a grant last year. Will this count against us? Should we ever "show our faces" again?

If we didn't have to chase you down for the reimbursement, you are in good standing with us. Things happen. Plans change. Projects fall through. It's OK. Tell us the truth. If you "see it coming," call. And stay in good standing with your community and your allies. It's a really small town; if you burn your bridges, we'll be able to see the smoke from here. Four Way is local and we know nonprofit work can be tough. So come back. We still love you.

The nondiscrimination policy requirement is a challenge for us because we are [in some way affinity-based or have a limited membership.] What do we do?

Don't discriminate. If your board cannot fully embrace nondiscrimination in their hearts, then we are not the correct funder for you. There are other funders.

Four Way wants to be certain that your clients, your volunteers, and your employees are protected from unfair treatment, because those are the residents of our service area, *the people to whom we are ultimately accountable as a Community Foundation*. We have one small exception: a church board can require that *its* board members are members of that church. That's fine. (But, if only **male** church members can be on that board, well, that's gonna be a stretch for us.)

And, if your nonprofit project arm has a separate governing board, it should make an effort to reflect the diversity of the people you serve, who, since you don't discriminate, could be anyone. If this requirement simply does not fit for you, then we are not a good fit either and you should look for other funders. Thank you for your work.

As in all things, The Four Way Community Foundation board reserves the right to evaluate all applications and all requirements on a case-by-case basis. Precedent is helpful to us but we will not be bound by it.

What else should I know about the Four Way Community Foundation?

How much time ya got? But for starters, we want you to know that Four Way offers more than grants! As our area's very own local Community Foundation, Four Way offers:

Financial tools: We hold endowments, make transfers of donated stock, manage invested funds, offer anonymous pass-through gift support, and multi-year gift assistance to help your donors maximize tax benefits. Ask us how the power of your Community Foundation can help you thrive!

Networking: We can connect you with people doing related work, facing similar challenges, or on a comparable cusp of growth. We may have a previous grantee that completed a project much like yours who can offer valuable advice.

Training: We provide no cost (in-kind) board basics training & other skills and tools for small nonprofits. Ask us.

Referrals: We can recommend you to additional funders, or make key introductions to help your work succeed. Call us up, tell us about your work, and let us offer a hand. Your success is our success, because *we live here, too!*

Letters of Support: Once we know your group, your work, your reputation, and where you fit into the landscape of services in our communities, we'll go to bat for you with other funders. Many of those funders know us and our in-depth knowledge of this area, so our recommendation carries weight. Let us know when you are going for a big grant and we'll most likely be able to give you a boost.

History: Four Way started in 1975 in a Rotary Club. We are now independent. We have given over \$8.8 million to local nonprofits and have had a hand in SO many local assets, like the GP Performing Arts Center and Raptor Creek Farm at the JoCo Food Bank. We have over \$13 million in assets under management for the benefit of this service area, which makes us the largest foundation serving our residents. There are much bigger funders out there, but no one else with this much resources dedicated exclusively to Josephine and western Jackson counties, and there's no one else who can guarantee that local philanthropic gifts will *stay local*. Please help us out by telling people who we are and what we do.