

## PHILANTHROPY MATTERS

# Grants Not Taken for Granted



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With the excitement of All Charities Weekend upon us, we've seen a healthy increase in inquiries about the Foundation's resulting Community Grants program. Members are often surprised to learn that our annual grant cycle's rigorous due diligence efforts engage the dedication of the Grants Committee and staff year round. Let there be no doubt that this committee of your peers is keenly mindful of stewarding their fellow members' donations!



Site visits, such as the Homestead Charity Tour embarked on by this group last week, are an integral part of the Grants Committee (GC) process: Ronald Cresswell, Shirley Shumway, Amy Upjohn, Sue Askeew, Barbara Murphy, Linda Owens (GC), Janie Sims (GC Chair), Kathie Markel (GC), Judy Wilson, Stevie Wishnack (GC), Nanette Elenbaas (GC), Bill Nutt (ORCF Chairman), Yuri Mikolay and Ken Karl (GC). Grants Committee members not pictured: Alan Goldstein, Jay Holmes, Cynthia Lee and Bob Schmetterer.

Ocean Reef members and employees alike are encouraged to recommend the grants program to local charities you support. The annual application deadline is November 1st for grants made the following spring (stay tuned as a change to October 1st is being considered). In the months leading up to that deadline we work with

dozens of applicants to ensure proposed projects match our guidelines, found on the Community Grants page at [www.orfound.org](http://www.orfound.org) with all details and needed forms. The guidelines are purposefully designed to ensure that grants go to sustainable charities.

In late summer and early fall we check in on each project granted to the previous spring and collect interim updates and photos that are included in *The Link* newsletter with that year's complete record of All Charities distributions.

Next, application packages – which must include our form with need assessments, project descriptions, timeline, proposed metrics and documentation of funding sources, plus required support documents: proof of charitable status (also independently verified), current financial statements and audit reports, IRS Form 990, income and expense reports for the prior year, project year budget and a project specific budget -- flood into the office. New applicants are cross-checked with related, known charities. After careful review and discussion over several months, we contact charities to answer all questions raised in the process, and rank the projects pending site visits.

Site visits are an integral part of the grants process. Each season the community is invited to

join the committee on at least three Charity Tours featuring four to eight charities each between December and March. The committee both reviews the results of the previous year's grants and investigates pending applications in person, on site. Each tour guest is asked to give feedback to help ensure that committee decisions reflect community values.

Today the committee awaits the results of the All Charities auction to assign amounts funding as many top ranked projects as possible. Next is a meeting with Keys Children's Foundation to compare duplicate requests and information on charities (environmental requests are also shared with the Conservation Association). On March 1st Grant Reports with documentation and evaluation of results are due for all of the previous year's grant projects and are taken into consideration in the current year's rankings (reports are mandatory for any future consideration; longer term projects will require an additional report later). Rankings are refined and finalized.

In late March, the committee's recommendations, including a summary of each project, are presented to the Foundation Board for a vote. All charities are individually informed of the results and the list of grant projects is published here in the *ORP*. As each charity returns a detailed, signed grant agreement during April, grants are awarded and dozens of promising projects get underway (match grant recipients will be required to show proof of a match before receiving their awards). Charities often have questions about complying with the terms in the following months, and occasionally a change in circumstance will call on the committee to approve a change in terms over the summer. Before we know it, we'll be asking for project updates and helping with the new applications and the process begins again!

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