

GRANT PROCESS

PRELIMINARY WORK

Read and understand the Foundation's Mission Statement, Guiding Principles, and Guidelines as found on our website before even submitting any grant request.



THE INITIAL GRANT APPLICATION REQUEST (Phase I)

A brief letter of 4-5 pages describing your organization, the project for which you are seeking the Grant, the potential impact of the project, and how it fits within the Foundation's grant making priorities. The Board of Directors will meet to discuss your proposal and if they determine that it falls within the Foundation's funding priorities and strategic direction, the Board will recommend the Grant Application be sent to your organization for completion.



THE GRANT APPLICATION (Phase II)

The Foundation sends out the Foundation's Grant Application for completion. This document is much more detailed, allowing you to expand on the goals of your project and why the foundation should fund it.



CONDITIONS OF GRANT AGREEMENT

This is the contract between your organization and the Foundation explaining that you must agree to specific conditions in order to receive the Grant. This covers all aspects of the Grant: how much is to be awarded, when it will be paid, all reporting requirements to remain in good standing with the Foundation over the project life, and other items that are specific to your own stated project. A sample Grant Agreement can be found on our website.

Board Meeting Dates

March 8, 2018

May 10, 2018

July 12, 2018

September 6, 2018

November 8, 2018 (Optional)

December 6, 2018

Grant Request/App Deadline

February 19, 2018

April 23, 2018

June 25, 2018

August 20, 2018

October 22, 2018

November 19, 2018

GRANT PROCESS SUMMARY

There are no specific grant cycles for the Paul Ogle Foundation as it will accept only pre-approved grant requests (see **IMPORTANT NOTE** section below) from eligible organizations throughout the calendar year. The Board of Directors meets six times a year to consider all grant request letters and applications for grants.

Requests and subsequent grant applications must arrive at least 3 weeks prior to a scheduled Board Meeting. See the table above for those Board Meeting and submission deadlines of this current year.

The receipt of a grant request by the stated deadlines above does not automatically guarantee it will be considered at the next the board meeting. The Foundation staff will ultimately determine completeness of the information received or other activities they deemed necessary based on the project being funded before it is put before the Ogle Board of Directors for discussion and/or decision.

IMPORTANT NOTE: *As of June 1, 2017, it is now required that you contact the Foundation office staff prior to any grant documentation submission to discuss your specific organization's request. Any grant submission without prior approval from Foundation staff will be rejected automatically and without response. We do this so that the Board knows to expect a submission from your organization and also makes sure your grant request is one that meets with the current funding priorities of the Board itself. Just because some projects may fall within the Foundation's mission or strategic vision does not mean it will meet with success. This is due to other organizational grants under consideration at the same time as yours, or the fact that the money may not be available for the levels in which you are seeking.*

A simple phone call or email will save you a lot of time/work plus set the proper expectations as to your request's likely reception by the Foundation's Board!

The Foundation follows a grant evaluation process that is meant to keep it simple for all grant seekers. Phase I is simply a 5-6 page letter asking the Board to consider their grant request along with a bare minimum of supporting documentation to support their request. At this point, the Ogle Board will either 1) agree to the grant request as stated, 2) seek more information by asking the grantee to fill out an application and/or seek modifications to be approved or lastly, 3) be declined. Our goal is to make this process as easy as possible, limit the work required in the document preparation and to adequately inform the Ogle Board on all the details required for their final decision.

In Phase II, the grantee is required to fill out the Foundation's grant application. This form asks general information about the organization, financial data that can be pulled from last few years' worth of federal tax returns, and answer questions on the specifics of the project to which the grant money will be applied.

Please note that the entire grant process at the Foundation can take up to 6 months as it could involve numerous meetings and site visits. Also note that no where throughout this entire process is there an implied guarantee of success.

The Foundation rarely, if ever, permits grantees to make presentations of their proposals to the Board of Directors so it is very important that those seeking funds are complete in the information that they provide the foundation and on any follow-up information requested of them. Failure to comply with any staff request could adversely impact the Board's final decision.

There are no emergency grant requests permitted unless directed by Board of Directors, so please plan accordingly.

PHASE I - INITIAL GRANT REQUEST

This is the first phase of the grant-making process and the intent is for the qualified organization to request a Grant Application from the Foundation. This first step allows the Board to review your grant request at a high level and permits them to give preliminary approval that your request is of interest and fits within the Foundation's overall mission and guidelines as stated earlier. It also keeps the actual work done on the part of the grant requester to a minimum since the Grant Application is seeking more detailed information and will require much more work to complete.

The good news for you is that the vast majority of all grant decisions are made by the Ogle Board in this phase!

The project proposed should involve one of the activities that the Ogle Foundation funds and fits within our mission/vision plus guidelines as described on our website. Also, if the project addresses some of the key strategic goals of the Foundation's mission/vision, that should be noted here as well.

The following information should be included with this document:

- A brief description of the need that will be addressed by the proposal
- A statement of the project's principal objectives
- How the need will be met and measured
- Brief background on the organization
- The name of the primary contact person for follow-up to this request
- The staff that will carry out the project and their qualifications
- A timetable for the project
- The total estimated project budget and other sources of support that may be forthcoming, including a list of donors and amounts*
- List of Board Members*
- Copy of the IRS 501(c)(3) exemption letter*

The letter of inquiry should be on your organization's letterhead and should not exceed five to six pages in length, excluding those items marked with the "*" above. It should be written in readable fonts like "Arial" or "Times-Roman", and should be no smaller than 10 pt in size. Proper English usage along with formatting associated with APA standards is encouraged. Bottom-line, it needs to be written so that the Board can easily read and understand your request.

We welcome advance copies of your request for review prior to official submission and are willing to give you feedback on its contents to ensure you are presenting your best effort with the information contained within it. This will greatly assist the Board in making their decision in this Phase and help you have the best shot possible for that grant.

Understand that an ideally crafted letter of inquiry will minimize the time spent proposing the project to us, but will provide the Board of Directors and/or staff with enough information to determine whether it warrants further review.

PHASE II – GRANT APPLICATION

It is in Phase II , the Grant Application (sample document) gives the Foundation's staff and board get a detailed picture of your organization, its management and financial health, the project details for which you are requesting funding, and its importance to the community. It is the place that the Foundation can best ascertain that this grant truly fits within our Mission/Vision and how we'd like to see our funds spent as per our Strategic Vision.

Lastly, the information that the foundation gleans from this document is also how we expect to see specific measurements in how the project is considered a success and should possibly receive additional funding in another grant cycle.

All the financial information for the Grant Application should be found in your organization's most recent IRS 990 tax returns. It will permit the Foundation's staff to do a quick check on your financial health and alert them to any potential long-term problems that might not permit the grant to succeed.

CONDITIONS OF GRANT AGREEMENT

If your grant application to the Paul Ogle Foundation has been successful, then you will receive a Conditions of Grant Agreement (sample document) in the mail. The Foundation will issue two of these documents for signature and will accompany any letter notifying you of Board of Directors decision. You must sign both copies and mail back one original to the Foundation to complete the process

The Foundation uses this document to describe in detail:

- The amount of the grant
- The payment terms of the grant, including expected payment dates and installments paid if any
- The grant reporting requirements
- Any other conditions that may be unique to the grant that the grantee must comply

The report section is important as this is the means by which the Foundation sees how the money was spent, what the money was spent on and the impact that the money has had on the organization, community or clients they serve. It is also the place that

the Foundation can use to see if the success criteria mentioned in the grant application were actually met.

Future grants can very well be impacted based on the quality of the information and how closely the grantee has adhered to their initial grant. Any deviation in the project's implementation as described on the grant application should always be cleared in writing to the Foundation prior to the changes being implemented. It is always safer to call the Foundation office versus making any assumptions at this point.

There will be no checks issued unless the Foundation office has a fully executed grant agreement in its possession.

The Foundation normally writes grant checks twice a year, on or around the 15th of June and December each year. Checks will not be written outside of those dates, no matter the emergency and with no exceptions unless deemed necessary by the Foundation.

