Orcas Island Community Foundation

2024 Spring GiveOrcas Campaign
Request For Proposals

The Orcas Island Community Foundation (OICF) is requesting proposals for the 2024 Spring GiveOrcas Campaign.

OICF's GiveOrcas Campaigns are a way to build awareness of local organizations and to raise funds to support the programs that make Orcas a stronger, more resilient community.

The success of the campaigns is achieved through a collaborative relationship between OICF, the island organizations, and most importantly, the community that unites to support the campaigns and the programs featured in it. GiveOrcas is a true community-wide effort.

Application Period Begins

The Application period opens on Wednesday, February 14th.

Deadline

All required documents need to be completed and submitted by 5PM on Tuesday, March 5, 2024.

Criteria

Grant requests are limited to a maximum of $25,000 during the Spring Campaign. Organizations that require more funding should contact OICF.

Proposals will be prioritized based on the following:

- Does the proposal address a specific need?
- What is the likelihood for success of the proposal?
- Is this need/request unique to Orcas?
- Does the proposal serve a significant number of islanders?

Qualifications

In order for your organization's proposal to qualify for consideration, you need to meet the following:

- Be a 501(c)(3), 501(c)(6) organization, government agency, school district, public service organization (such as the library), or have a fiscal sponsorship agreement with an organization
- Complete and upload all required documents outlined in Required Documents for All Applicants

Required Documents for All Applicants and Steps to Complete Application

- **Qualification Checklist**: We suggest that organizations review the Qualification Checklist to see if you qualify to submit an application for GiveOrcas. If you are not sure if you meet the necessary requirements, or have questions about qualifying, please let us know. Email Lynn White or call 360-376-6423.
- **Grant Request Application** - complete this *before starting the Online Grant Request Form.*
- **Approval Letter**: Provide a letter from your Board Chair approving the GiveOrcas grant request.
- **Mission Statement**
- **List of Current Board Members**
- **Online Form**: The online form has several fields that will need to be filled. All of those responses can be copy/pasted from the Grant Request Application completed in advance. Please attach all of the required documents, files and images with the online application form.
- **Image**: The image should be 300x300 PPI in a JPG or PNG file format; the image is small—think postage stamp; complex images do not work well; please choose an image that looks good as a small size and illustrates the concept of your grant request if possible.
- **Collaborative Project**: If your organization is collaborating with others, submit supporting letters from all participating parties.
- **Fiscal Agent**: If an organization is sponsoring your project, submit a fiscal agent sponsor agreement that is signed by all participating parties; if needed, you can find a sample fiscal sponsorship agreement listed on the National Council of Nonprofits' website.

Required Documents for Applicants requesting over $3,500
    Financial Documents to submit with your application::

- Latest IRS Form 990
- Annual Budget
- Balance Sheet
- Profit & Loss Statement

If you are new to GiveOrcas and grantmaking

For applicants who have not received a GiveOrcas Grant in the last three years or who are new to GiveOrcas, the following information and documents need to be completed and submitted:

- **Number of times your Board met in the last year**
- **Whether you keep minutes of your Board meetings**
- **Financial Documents to submit**: *see next page*
    - Latest IRS Form 990
    - Annual Budget

- Balance Sheet
- Profit & Loss Statement

Next Steps

A member of the OICF Grants Committee will contact you in early March. They will have reviewed your application and will answer any questions you might have. They will also confirm:

- Your request meets the criteria
- The amount requested is appropriate for this grant cycle
- Your organization has a plan should you receive partial funding, and that the donors' intent can be honored even if a proposal does not reach full funding
- Your organization has a marketing, communications and outreach plan for the GiveOrcas Campaign
- Ask and answer any additional questions
- All applicants are invited to attend the GiveOrcas Workshop via Zoom on **Wednesday, April 17 from 3-4 pm** to learn about updates to this campaign cycle and ask questions

Questions

Check out our FAQs. If you don't find the answers to your questions about your grant application or if you have additional questions, please, email Lynn or call 360-376-6423.

We encourage you to reach out as early as possible if you have questions.

Reporting Guidelines

If your organization is selected to be part of GiveOrcas, all reporting requirements will be included with the letter of notification.

All organizations that receive a grant through OICF are required to submit a final report at the conclusion of the grant's use. OICF reserves the right to ask for an interim report.

Schedule

APPLICATION PERIOD	
February 14	**Open Application Period**
March 5	**Applications Due**, 5 PM
March 12 - March 26	**Committee Review and Outreach to Applicants**

April 1 - 5	**Grant Committee Meetings**
April 10	**Notify Applicants of Status**
April 17	**Optional Grantee Meeting**: 3-4 PM Via Zoom
CAMPAIGN PERIOD	
May 8	**Campaign Starts**, 12:00AM
May 10	**Unique Donor Day**; $1,000/$500/$250 Prizes
May 14	**Ben Franklin Day**; $1,000 Prize
May 15	**GiveOrcas Open House** **Youth Philanthropy Awards** **Campaign Ends**, 11:59PM
POST-CAMPAIGN PERIOD	
May 20	**Board Approval of Grants**, Via Email
May 27	**Issue Grant Checks & Letters** **Send Out Donor Lists** **Provide Reporting Guidelines**

GiveOrcas Campaign Policies
- OICF will consider applications for part of an organization's general operating funds. OICF wishes to help organizations become healthy, effective, efficient, and good stewards of community resources.
- Grants are made for projects that are well-conceived and likely to be successful in improving the quality of life on Orcas.
- The grant-making process supports building the strength and capacity of the island's organizations, as well as encourages collaboration among organizations that provide similar or related services.
- The grant-making process avoids conflicts of interest as set forth in the OICF Conflict of Interest Policy.
- Grantees are fiscally sound as demonstrated in the IRS Form 990 and/or financial statements.
- Your board is independently-governed as stated in Section 3: Governing Body of IRS' Best Governance Practices in Governance and Related Topics—501(c)(3) Organizations.pdf.
- No grants are made to individuals (including scholarships), private foundations, for-profit enterprises or conduit organizations which pass funds through to other organizations for distribution to ultimate beneficiaries of their own choosing.

- OICF will not consider multiple requests from the same organization in the same cycle with the exception of the Orcas Island School District (OISD), which governs three distinct entities: the Elementary, Middle and High School—each of which may submit a proposal. Additional exceptions may be made for organizations acting as fiscal sponsors for programs that benefit the community but are not yet officially registered as a 501(c)3 or 501(c)6.
- An organization may submit their own application and an application for a program, acting as a fiscal sponsor, per cycle.
- Grant funds are restricted to supporting the appropriate purposes for which the grant was approved. If an organization is having difficulty spending the funds for the purposes expressed in their grant proposal or in the allotted time frame, the organization needs to notify OICF in writing within six months from the date the grant check was written. OICF will work with the organization to ensure the funds get used appropriately and within a reasonable timeframe. If an alternative plan cannot be agreed upon, the funds need to be returned to the OICF Partners in Philanthropy Fund.
- If OICF becomes aware of possible discriminatory practices, the staff will investigate the matter. If an issue becomes apparent as a result of that investigation, then funds may be withdrawn, either upon a vote of the Board of Trustees or, if time is of the essence, by its Executive Committee.

2024 Spring GiveOrcas Campaign
Qualification Checklist

Before filling out the GiveOrcas Application, run through this checklist of necessary criteria to see if you meet the threshold to apply.

If you are not sure if you meet the necessary requirements, or have questions about qualifying, please let us know. You can email Lynn White or call 360-376-6423 with questions.

For All Applicants

☐ Your organization is a registered 501(c)(3), 501(c)(6), government agency, school district, or public service organization (such as the library)

☐ Your organization is fiscally sound as demonstrated in your IRS Form 990 and financial documents

☐ Your board is independently-governed as stated in Section 3: Governing Body of IRS' Best Governance Practices in Governance and Related Topics—501(c)(3) Organizations.pdf

☐ Your organization's governing board has approved this project

For Applicants Who have a Collaborative Project

☐ You can provide letters of support from all participating parties

For Applicants with a Fiscal Sponsor

☐ You can provide a fiscal agent sponsor agreement that is signed by all participating parties; if needed, you can find a sample fiscal sponsorship agreement listed on the National Council of Nonprofits' website

For Applicants Requesting over $3,500

☐ You can provide your organizations most recent financial documents to include::
  - Latest IRS Form 990
  - Annual Budget
  - Balance Sheet
  - Profit & Loss Statement

For Applicants Who have not Received a GiveOrcas Grant in the Last Three Years or are New to GiveOrcas

☐ Your board meets on a regular basis

☐ You keep minutes of all of your board meetings *(continues on next page)*

☐ You can provide the latest IRS Form 990, Annual Budget, Balance Sheet, and Profit & Loss Statement

For First Time Applicants to GiveOrcas

If you meet all of the requirements above, please email Lynn White or call her at 360-376-6423 so that we can get you set up as a Grantee.

Questions

Check out our FAQs. If you don't find the answers to your questions about your grant application or the process, please reach out to Lynn by email at Lynn White or call 360-376-6423.

We encourage you to reach out early with any questions.

2024 Spring GiveOrcas Campaign
Grant Request Application

The following is the Grant Request Application for the 2024 Spring GiveOrcas Campaign.
Please complete all applicable fields.

Steps for Application

- First review the Qualification Checklist Form to see if you qualify to submit an application for GiveOrcas. If you have questions about qualifying, please email Lynn White or call 360-376-6423 to discuss your situation.
- We highly recommend running your ideas for a proposal past a member of OICF prior to starting the application process.
- Fill out this Grant Request Application before beginning the Online Grant Request Form. This will make the online application process much easier.
- Once this Application is complete, you can copy and paste some of these fields to complete the Online Grant Request Form.
- Go here, find the name of your organization, and click on it to access and complete your Online Grant Request Form. If you are a first time applicant, you will need to email Lynn or call 360-376-6423 for you to access the form.
- After you complete the Online Grant Request Form, please attach this Grant Request Application and any other required documents as PDFs. Images need to be attached as either JPG or PNG files.
- When attaching multiple documents, you need to attach one, then click the *Next* button. This takes you to a new screen. Then scroll to the bottom, and click on "Add more PDF Documents." Upload the next document, and click on the *Next* button. Continue this process until you have uploaded all documents, and then click on *Submit Request*.
- A member of the OICF Grants Committee will contact you to speak with you if we have any questions with your application.

Deadline

- **All required documents need to be completed and submitted by 5PM on Tuesday, March 5th, 2023.**

Organization & Contact Information

Organization Name:

Web Address:

Contact Name:

Email:

Phone:

Board Chair Name:

Email:

Phone:

Mission Statement:

Complete list of Current Board Members:

Request Overview

Grant Amount Requested: $

Has the organization's governing board approved this project?
If so, provide a letter from the Board Chair approving the GiveOrcas grant request.

Short Description: Describe your submission succinctly. *(Max length: 65 characters including spaces)*

Long Description: Describe your submission. *(Max length: 400 characters including spaces)*

Detailed Description: Describe your proposed project, the demographics/number of people served, and a timeline for completion. *(Max length: 1,000 characters including spaces)*

Need/Issue Statement: Describe the community need/issue your project seeks to address and whether you will work with others in your sector. *(Max length: 1,000 characters including spaces)*

Cost/Budget: Describe the total project costs and what portion will be covered by the OICF grant request. Include non-cash contributions (e.g. volunteer labor, in-kind contributions, etc.). Describe what other funding is being sought or has been received for this project. *(Max length: 1,000 characters including spaces)*

Marketing/Communications/Outreach: Describe how your organization will reach your donors during the Campaign (e.g. social media posts, email campaign, direct asks, etc.) and who will make up your team. *(Max length: 1,000 characters including spaces)*

Grants for Operating Expenses: If your request is for operating expenses, what is your plan to sustain your operations over the next five years? *(Max length: 1,000 characters including spaces)*

Collaborative Project

If your organization is collaborating with others, please submit supporting letters from all participating parties.

Fiscal Agent

If an organization is sponsoring your project, please submit a fiscal agent sponsor agreement that is signed by all participating parties. If needed, you can find a sample fiscal sponsorship agreement listed on the National Council of Nonprofits' website.

Required Documents for Applicants Requesting over $3,500

For proposals over $3,500, the following additional documents need to be submitted:

Financial Documents to submit:
- Latest IRS Form 990
- Annual Budget
- Balance Sheet
- Profit & Loss Statement

Required Documents for Applicants Who have not Received a GiveOrcas Grant in the Last Three Years or are New to GiveOrcas

For applicants who have not received a GiveOrcas Grant in the last three years or who are new to GiveOrcas, the following additional documents need to be completed and submitted:

How many times has your board met in the last year?
Do you keep minutes of all of your board meetings?

Financial Documents to submit:
- Latest IRS Form 990
- Annual Budget
- Balance Sheet
- Profit & Loss Statement

Questions

Check out our FAQs. If you don't find the answers to your questions about your grant application or the process, please email Lynn White or call 360-376-6423.

We encourage you to reach out with questions earlier rather than later.