

Matching Grant Packet

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Basic Information

What's in this packet?

This document provides detailed information about the Fund for Democratic Communities (F4DC) and its grant-making policies, so that grant-seekers have the tools they need to request funding. It begins with basic information about F4DC's matching grants program, including eligibility and funding priorities, so grant-seekers can decide whether their project or group is a good match. This is followed by information on how we evaluate grant requests, application submission procedures, detailed instructions for completing the application, and what happens if your grant application is approved.

Mission of the Fund for Democratic Communities

The Fund for Democratic Communities supports community-based initiatives and institutions that foster authentic democracy to make communities better places to live. F4DC makes grants; convenes groups and individuals committed to social and economic justice through deepening democratic practice; conducts research; and produces materials to nurture the growth of authentic democracy.

Purpose of F4DC's Matching Grants Program

Like individuals and institutions across the globe, F4DC is facing tight times; making it critical that we leverage every dollar we have for the greatest possible impact. Plus, as environmental, economic, and social systems collapse around us, it's more important than ever for people to organize themselves to create and sustain new kinds of institutions that flexibly respond to emerging challenges. For these reasons, we're launching a matching grants program to encourage grassroots groups to build their capacity for self-support. For approved groups and projects, we will match, dollar-for-

dollar, grassroots-fundraised money. Funds raised from foundation and government sources will not be eligible for matching.

Every time we make a grant, we're just as pleased as we can be to play a small part in nurturing that group's growth and success. But we're very well aware that our financial support, while important, isn't the main thing that makes a difference. It's the good ideas and collective hard work of people struggling to make their community a better place to live. Our matching grants program is designed to encourage good ideas backed up by this kind of collective effort.

What do we mean by "grassroots fundraising?"

We mean the kind of fundraising activities that build and sustain grassroots efforts by pulling in more people as committed stakeholders—especially folks in the communities that the group or project is focused on. Examples include (but are not limited to) direct solicitation (phone your friends!); fundraising events (spaghetti dinners and fish fries!); door-to-door campaigns (Hey neighbor, did you hear the neighborhood grocery store is closing? Want to help bring in a new one that's more committed to our community?). This is the kind of fundraising that strengthens and sustains social movements, by broadening the base of support and deepening the level of commitment among stakeholders. Use your imagination to come up with fundraising approaches that will work in your world. If you need ideas, consult F4DC's library of grassroots fundraising approaches, tools, and tips (<http://f4dc.org/library>).

F4DC's Grants Program Is All-Volunteer

F4DC is trying to put more money into the community, to support grassroots democratic work. Trained volunteers who are committed to nurturing authentic democracy run our grants program. The people you'll be dealing with throughout the grants process have other jobs and commitments, so please be patient if we don't answer your calls or emails right away. We promise we'll get back to you within the timelines outlined here!

Matching Grants Program

Eligibility Requirements

Groups must meet each of the following five criteria to be eligible for funding:

1. They must be organizations. We do not fund individuals.
2. The primary focus of the organization should be on making the community a better place to live by addressing one or more of the focus areas of the Fund for Democratic Communities: education, recreation, arts, housing, community health and safety, justice, humans' relationship with the natural environment, relationships between different communities, and sustainable economic

development.

3. The organization must demonstrate or be willing to enhance the use of democratic practices, through:
 - a. The inclusion of ever-widening numbers and kinds of people in selecting focus issues and strategies.
 - b. Making sure that the people who are most affected are meaningfully involved in decision-making and doing the work.
 - c. Making efforts to strengthen sustainability by drawing more and varied kinds of people (including youth and the disempowered) into positions of leadership.
4. The applicant group must be in possession of eligible funds before a match can be made. Pledged or borrowed funds are not acceptable.
5. The organization matches ONE of the following descriptions: The organization is tax-exempt under the Internal Revenue Code Section 501(c)(3), OR the organization has established a relationship with a fiscal sponsor who has IRS tax-exempt status.

Matching Grant Program Priorities

TO BE ABSOLUTELY CLEAR ABOUT THE PROJECTS WE PRIORITIZE: Our focus is **not** on service projects (good people helping less fortunate folks), but rather on projects that connect people together as they collectively strive to make positive change in their own communities (people helping themselves by working together). We also give consideration to whether and how groups and projects are trying to use democratic and participatory methods of engagement and decision-making as they go about their work.

The matching grants we make vary in size, duration, and frequency, and are determined based on the project's relationship with the mission and objectives of F4DC, the potential impact of the project, and the availability of funds.

Smaller grassroots groups are a priority for us, especially groups that have limited access to funding from corporate or mainstream funding sources. In rare cases, F4DC will make grants to groups with corporate or mainstream funding, with the specific goal of enhancing the grassroots and democratic components of a program.

F4DC will consider stand-alone projects, general support for organizations, or organizational start-up efforts for matching grants.

For its matching grant program, F4DC gives priority to groups in the Piedmont region of North Carolina. In some cases, F4DC will make matching grants to organizations based outside this region if it seems that a partnership between the organization and F4DC

will result in useful learning about building democracy, which we can put to work in the Piedmont.

F4DC believes that bringing up the next generation of leaders by integrating them appropriately in community life and work is a critical part of building sustainable grassroots democracy. That does not mean that every project we fund must be targeted explicitly to youth, but it does mean that we are interested in how your project engages and relates to younger folks.

A Note about What We Do **NOT** Fund:

- Capital or endowment campaigns;
- Debt retirement;
- Political candidates or political campaigns;
- For-profit entities;
- Programming that promotes religious instruction or doctrines;
- Organizations based outside the U.S. and its territories;
- Publications or cultural projects that are not directly connected to grassroots democratic organizing campaigns and not used as tools for social justice organizing;
- The provision of social or direct services if they do not demonstrate a degree of community-based organizing to expand democracy and challenge systems of oppression;
- Other grant-making foundations or funders — we do not provide funds for re-granting.

Examples of the kind of efforts we're interested in funding

Example 1

Group/Organization: High School Hell-Raisers

Project: Travel fund for a group trip to the US Social Forum in Detroit

How the money was raised: High School Hell Raisers held car washes on three consecutive Saturdays, raising \$963.

The match from F4DC: F4DC grants High School Hell Raisers an additional \$963 for their group's travel to the US Social Forum. They now have a total of \$1,926 for the trip.

Example 2

Group/Organization: The Alternate Parents Group (APG)

Project: Hosting an open forum on standardized testing in public schools. APG needs funding to rent an appropriate facility, pay for event publicity, and hire a trained facilitator to conduct an effective meeting.

How the money was raised: Seven members of APG contributed \$10 each and then each committed to raising \$10 from four more friends and community members. This process generated \$310 (not everyone quite made their personal fundraising goal, but they got awfully close). The APG also applied for and received a \$500 grant from a local community foundation for the project.

The match from F4DC: F4DC matches the \$310 raised directly from the community with an additional \$310. The group then has a total of \$1,120 for their event.

Application Evaluation Criteria

F4DC is in a continuous process of refining sound, democratically focused criteria to evaluate grant requests. We make our criteria known to all potential grantees so they can decide whether their projects match our goals, and if they do, make the best case for their projects. At present, we are using the criteria listed below.

Relationship with F4DC's Mission, Values and Policies

- Does the project deal with one of our focus areas: education, recreation, arts, housing, community health and safety, justice, humans' relationship with the natural environment, relationships between communities, and sustainable economic development?
- Is the organization or the proposed project in the Piedmont region of NC? If not, is there potential for grassroots democracy in the Piedmont to be enhanced by our connection with this organization or project?
- How much access does the organization have to corporate or mainstream sources of funding for this project?
- Would funding this proposal help F4DC come to a better understanding of its own mission, values, or policies?

Democratic Practices (current and projected)

- Is the project a community-based initiative that fosters building and deepening grassroots democracy?
- Does the proposal demonstrate that the organization uses democratic practices or is willing and able to enhance its use of democratic practices?
- Are the people most affected by the problem meaningfully involved in decision-making and implementation?
- Is the leadership representative of the community served by the organization?
- What role does the organization's board or governing committee play in the decision-making, activities, and financial oversight of the organization?

Grassroots Fundraising

- Has the group raised the funds they hope to be matched by F4DC by connecting to the people who are most directly affected and concerned with the issue they're working on?
- Have the fundraising activities deepened connections within the community?
- Have the fundraising activities deepened the group's capacity to sustain itself for the long haul?

Project Goals, Plans, and Outcomes

- Is the project addressing issues that are a priority for the community?
- Is there a compelling and strategic need for this project?
- Are the project's goals, methods, timeline, and outcomes clearly defined?
- Is the plan based on a theory about how people and communities change?
- Will the community be impacted positively by the project, and if so, how great an impact will there be relative to the amount of the request?
- Does the project empower those who are impacted by the project?

Organizational Capacity to Complete Successfully

- Does the organization have the leadership and personnel (whether paid or volunteer), budget, and know-how to carry out the proposed project?
- Does the organization have the necessary relationships within the community to enable it to carry out its objectives?
- Is the budget clear, realistic, and appropriate for the scope of the project?

Potential for Sustained Engagement/Deepening of the Work over Time

- When the project is finished, will there be more committed people, tighter relationships, or greater capacity in place in the community so that they can take it to the next level?
- Does the project lend itself to expansion, enhancement, and replication?

When and How Are Matching Grants Made?

F4DC considers applications for matching grants on a rolling basis, as they are submitted, and as long as F4DC still has funds in its yearly budget for matching grants. F4DC will not consider applications submitted without adequate lead-time before the requested funds are needed. That means: mail your application with complete documentation no later than **4 weeks** before your group's deadline.

If your project is complicated and thus requires more information or deliberation, submit your application even earlier.

Grant seekers are encouraged to email F4DC to ask questions or discuss any aspect of your project **before** you spend a lot of time completing an application and collecting documentation. Framing an email in which you put your ideas in writing for someone else to see can be an important first step in clarifying your vision. In addition to describing the project, give us a rough idea of when and how you are intending to raise your grassroots dollars (the funds you want us to match). We'll be able to tell you whether the funds you are hoping to raise are eligible for matching and up to what level. Inquiries about potential grant requests should be directed to **grants@f4dc.org**.

In some cases, groups will continue their grassroots fundraising right through the time that their application is being considered by F4DC. If this is the case for you, explain in the Funding section of the application that you hope to raise more eligible dollars, and you'd like us to check in with you on the final total. We'll try to work with you.

If your application is approved, F4DC will disburse matching funds by writing a check to your group. F4DC can only write checks to groups that have 501(c)(3) status. If your group does not have 501(c)(3) status, you must find a 501(c)(3) organization that is willing to act as the fiscal sponsor for your project. If you are using a fiscal sponsor, F4DC will write the check to the fiscal sponsor, and they will disburse the funds to you.

If your application is approved, your group will be required to submit a brief written report on the use of the funds. Groups that receive grants for more than \$500 may be required to track the expenditures of the granted funds using a simple ledger form that we will provide.

All F4DC grant funds must be used for the purposes outlined in the grant application. Any funds used for other purposes must be repaid to F4DC unless written permission has been granted by F4DC prior to their expenditure. In addition, unspent funds that remain at the end of the grant period must be returned to F4DC unless written permission has been granted for your organization to keep the funds.

How to Submit a Grant Application

1. Download the Matching Grant Application form, which can be found on the Grants page of F4DC's website (<http://f4dc.org/grants>).

2. Answer all the questions on the form with complete and accurate answers. See the next section, “Application Instructions,” for guidance on answering the questions on the form.
3. Gather photocopies of required and related documents that illustrate what your group or project is doing and how you raised the money you want F4DC to match. See “Application Instructions” for information on the kinds of documents we mean. Please do not send original documents. These may not be returned to you.
4. Get two authorized representatives of your group to sign the Grant Agreement portion of the application. The persons signing the Grant Agreement are responsible for the accuracy and completeness of the application. If the application is approved, they are also responsible for making sure that any matching funds F4DC provides are expended for the purposes outlined in the application, and all required reports are submitted to F4DC on a timely basis. *(Read the entire Grant Agreement for the full list of responsibilities carried by the signers and the group as a whole.)*
5. Mail your completed, signed application and related materials to:
F4DC
712 South Elam Avenue
Greensboro NC 27403

Emailed applications will not be accepted. Matching grants require evidence that you have the money you’d like us to match in hand, and that the money was raised through grassroots means. This means your grant application has to come with photocopies of various documents (*see #3, above*). Also, we need original, not facsimile, signatures on your grant application (*see #4, above*). That’s why we need your grant application to come in the mail and will not accept emailed applications.

Keep a copy of your entire grant application and related documentation. You'll need to refer to it if we call with any questions during the application review process. If your grant request is approved, you will need the application to help you shape the report you're required to submit to F4DC when your project is completed.

Application Instructions

There are six sections on the grant application:

1. Information About Your Group or Organization
2. Contact Person
3. Information About the Project for Which You’re Seeking Funding
4. Funding for Your Project
5. Tax Status of Your Organization
6. Grant Agreement

Information About Your Group or Organization

Name of Group/Organization (required). Use your group's "official" name and not a popular or shortened form. If your group is a start-up and doesn't yet have an official name or title, it's time to come up with one. You and your friends probably have some way you refer to it when you're planning a meeting — use that name. NOTE: If you don't have a name for your group, it *may* mean you're not really a group yet. And that means you're not ready for an F4DC matching grant — we only fund groups, not individuals. Please come back later when you've made more progress gathering folks together in a common cause.

City (required). This helps us quickly see what part of the world you're from and helps us balance the grants we make across different places.

Focus (required). In no more than one sentence, name the focus of your group. Examples: Education Reform, Community Empowerment, Ending Environmental Racism, etc.

Website, Email, Phone, Address (optional). None of these is required — your group may not yet have need for these tools. However, if you do have a dedicated phone line, an office, or a web presence, we'd like to know about it.

Contact Person (required). Name the person who will serve as the primary information point between your group and the F4DC. Usually, this person is one of the people who sign the Grant Agreement portion of the application. Name, Email, Phone, and Mailing Address for the contact person are all required.

Information about the Project for Which You're Seeking Funding

This section is where you tell us about the project or ongoing work for which the requested funds will be used. F4DC will consider stand-alone projects, general support for organizations, or organizational start-up efforts. All the questions in this section are required.

Project Name/Title. If you have an official name for the project, please use it. If this is something new, give it a name, because we need a shorthand way to refer to it as we discuss your grant application. And, if your grant application is approved, we need a way to quickly refer to the project in our records and publicity materials. The name does not have to be catchy, but it should be accurate. For example, if you're seeking general operating support for an organization that is up and running, then you can title the project "General operating support." The name should make sense given what you're planning to do.

Grant period. Define the period of time in which you'll be doing the work and expending the funds applied for. Tip: Make sure the start date is at least four weeks beyond the date we are likely to receive your application in the mail.

Description of the issue or opportunity you're focused on and the group or community to be affected by project. Please describe the reasons for the project. Your description should be no longer than three paragraphs (double spaced) and should at the very least address the following questions:

- What issue or opportunity is before you?
- In which community or communities?
- Why is it important to address this issue or opportunity?
- What will be different or better if your group successfully completes this project?

You do not need to answer each of these questions separately; just make sure your description includes that information.

Description of the specific work you'll do. Please describe the specific work plan your project will follow. Include the major steps, who will do the work, where the work will be done, and how it will be accomplished. Include a rough timeline for major steps. Again, one to three paragraphs (double spaced) should be sufficient. Being specific helps speed up our review process.

Total estimated cost of project. The key word here is "Total." We're looking for a single number representing the grand total you will spend to accomplish your goals. This includes, but may be larger than, the amount you're asking for from F4DC plus the grassroots portion you want us to match.

Preliminary list of expenses that make up the estimated cost listed above. Please provide a rough budget for the project, using major categories of expenditure. Following the overall budget, explain how you arrived at any figures that aren't obvious.

For example, if you're going to pay neighborhood teenagers to go door-to-door to conduct a survey of community needs, you might write:

For four consecutive weekends, pay three teenagers \$8.00/hour for 5 hours of data collection = 4 X 3 X \$8.00 X 5 = \$480.

Perhaps you also want to pay the expenses of a day-long community meeting to share the information collected by the teenagers, discuss the data, and come up with a plan for your next steps. You might write:

<i>Rent meeting space for 6 hours</i>	<i>\$120.00</i>
<i>Lunch for 40 people @ \$7/person</i>	<i>\$280.00</i>
<i>Pay facilitator (8 hours @ \$25/hour)</i>	<i>\$200.00</i>
<i>Total</i>	<i>\$600.00</i>

Funding for Your Project

Total funds raised to date. We're looking for a single number here: the grand total of everything you've raised from any source for this project, including grassroots sources as well as foundation or government sources.

Total grassroots-raised funds eligible for a matching grant. This is the total of everything you've raised through grassroots fundraising. These are the dollars that are eligible for an F4DC matching grant. (*Tip: this number should be equal to or less than the number you provided for the previous question.*)

Documentation that you have these funds in hand at the time you submit the application is required. There are different ways to supply this documentation:

- Attach a photocopy of your group's bank statement showing the deposit of the funds during the timeframe in which you were doing your fundraising;
- Attach copies of dated, signed receipts you gave to donors;
- Attach photocopies of checks made out to your organization in the time frame in which you were doing your fundraising. Make sure the checks indicate what the funding is for on the memo line;
- If some or all of your donations came in cash form and you don't have a bank account (perhaps the cash came in at the ticket table for a fish fry or through a pass-the-hat effort), an F4DC representative may need to personally verify you have the cash in hand. If this is the case for you, send us an email, and we'll find a time we can meet and literally count the cash.

In some cases, your group may be doing fundraising right through the time frame in which F4DC is reviewing your application. If this is the case for you, explain that you'd like us to check in for your final amount of grassroots-fundraised dollars. In the application itself, tell us how much you've already raised, and that you hope to raise more in the next few weeks. We'll call or email to see where things stand and decide what kinds of additional documentation we need.

Description of fund-raising efforts for eligible funds. In one to three paragraphs (double spaced) describe how you raised the money. Be specific. For example, you might write:

We raised \$135 through email solicitations of friends, \$195 through phone call solicitations (Joya, Mary, and Fahiyim made these calls), \$45 at a hot dog sale, and \$125 by four of us (Fahiyim, Cheri, Mary, and Jorge) going door-to-door in our neighborhood.

To document your fundraising efforts, please attach photocopies of any materials you used such as:

- Invitations or flyers announcing fundraising events;
- Phone scripts used by volunteers dialing for dollars;

- Photos taken at the fundraising events;
- Training materials used to get group members ready to go door-to-door;
- Copies of fundraising letters, etc.

For the example above, you might include copies of the fundraising email, the "script" Joya, Mary, and Fahiyim followed when they made phone calls, a flyer advertising the hot dog sale or pictures documenting the hot dog sale, and materials from the training session you held to get Fahiyim, Mary, Cheri, and Jorge ready to go door-to-door.

Total non-eligible funds. There are two parts to this section. First, we're looking for a single number that represents the total amount of funds you've received that are **not** eligible for F4DC matching. These typically would be grants and government funds. Second, we'd like you to specify the **source** and **amount** you've received from each non-eligible source. We ask for this information so we can get an idea of how you're funding the work overall and where our grant from us might fit into this.

Tax Status of Your Organization

Federal and state law mandates that F4DC can **only make grants to qualifying 501(c)(3) organizations**. That's why we ask for your group's tax status. Check Yes or No, based on your organization's tax status as of the date of the application. If you check Yes, tell us the date the IRS granted you tax exempt status (that's the date in the upper left hand corner of your approval letter from the U.S. Treasury). Or, you can include a photocopy of your tax-exempt notice from the IRS.

If you've applied to the IRS for 501(c)(3) status, but you haven't received your approval letter yet, drop us an email at grants@f4dc.org. We'll figure out together whether you need to get a fiscal sponsor or are adequately covered under the IRS rule that allows some groups to begin acting like tax-exempt organizations while they await a decision from the IRS.

If you check No, you'll need to specify a 501(c)(3) organization that is willing to act as your fiscal sponsor. If you're using a fiscal sponsor, name the group on the form and provide contact information for the person who will be dealing with any grant coming your way. You must also attach a letter from an authorized person in that organization, on letterhead, in which they clearly state their willingness to act as your group's fiscal agent for the purposes of administering a grant from F4DC. In that letter, they should specify the date their organization received tax-exempt 501(c)(3) status. Or, they can include a photocopy of their tax exemption letter from the IRS.

The Grant Agreement

We're trying to streamline the grants process, which means that we now combine the signatures required on the grant application with the signatures required on our old grant agreement form. Getting the grant agreement form mailed out, signed, and

returned added extra steps and time between the approval of the grant and when the check could be written. So to get money to worthy projects quicker, we're now asking potential grantees to agree to all the terms of a possible grant ahead of time.

One of the ways that we ensure that we're funding viable group projects (and not individual efforts) is by requiring two signatures on the Grant Agreement. Since both people are to be fully aware of the contents of the application and legally liable for making sure grant funds are well spent, it kind of rules out lone wolf efforts. So signing the Grant Agreement is a solemn thing. Don't overlook its importance, and *make sure you understand what you're agreeing to before you sign it!*

What Happens After the Application is Submitted?

Receipt of a grant application is acknowledged by email within seven days of when it shows up in our mailbox.

If you have submitted a proposal but haven't heard from us within seven days, please contact us to make sure we received it.

Before we do a detailed review of your request, we'll do an initial screening for eligibility and completeness. Proposals that do not meet all the requirements may not be considered at all, though we may contact you for a small piece of missing information if it seems everything else is in order.

Trained F4DC volunteers will then review your application on the basis of the criteria listed earlier in this document. Follow-up phone calls, meetings, or site visits are common during the review process to help us gain a clear picture of your group's goals, capacities and plans.

Within four weeks of receiving your application, we'll get back to you by email, with a clear answer as to whether we're going to fund your request, and if so, the exact amount.

F4DC receives far more proposals than can be funded. Requests may be awarded in full or in part; they may be awarded with contingencies; or they may be declined.

If You Are Awarded a Matching Grant

If your grant application is approved, F4DC will disburse matching funds by writing a check to your group. F4DC can only write checks to groups that have 501(c)(3) status. If your group does not have 501(c)(3) status and you are using a fiscal sponsor, F4DC will write the check to the fiscal sponsor, and they will disburse the funds to you.

By accepting the grant from F4DC, you're agreeing to several things. The Grant Agreement that your group's authorized representatives are required to sign when the application is submitted includes the list of things you're agreeing to if you accept an offered grant.

Here are explanations of each point:

1. Your group will get to work on its project and use the grant funds for the purposes described in your grant application. If you need to make a major change in the project such that funds would be expended for substantially different purposes, you must consult with F4DC in advance and receive written permission for the change. Otherwise you may have to repay or forfeit grant funds.

Federal and state laws that govern F4DC, as well as our own commitment to ethical, accountable practice, require that our grantees and we work hard to ensure that grant funds are spent on public purposes that are in accord with the mission of F4DC. We know that a project proposal and budget are simply statements of how we think the work will unfold and what things will cost. In the course of actually doing the work, new circumstances may arise that make it inadvisable or impossible to do things exactly as planned. However, as plans evolve and change, it is still important to stick to the general outlines of the plan and budget.

No matter what, it is absolutely necessary that every penny spent from the grant be spent for public purposes, and not for personal financial gain. Further, under no circumstances may grant funds be used to influence legislation or influence the outcome of any public election.

As you go about your work, if you encounter a situation that requires you to make a major change to your work plan or budget, you must inform F4DC of your changed plans and seek approval. Our general policy is to be flexible and responsive with our grantees, just as we hope they would be in carrying out their work in the community. So you can expect that every reasonable change will be approved. However, if the shift in spending, activities, or schedule is seen to significantly change the purpose or reduce the effectiveness of your project, we may not allow the change.

2. You have to use the grant funds during the Grant Period listed in your grant application. If there are unused funds remaining at the end of the Grant Period, you must return them to F4DC unless we have provided written permission for you to keep the extra funds. We know that projects sometimes take longer to get underway or to complete due to unforeseen circumstances. Our policy is to allow reasonable extensions of the end date when grantees request an extension in a timely manner and provide a reasonable explanation of circumstances. If you are having difficulty spending down your grant in the agreed-upon time frame, do not hesitate to call us.
3. You must submit a brief written report to F4DC within 30 days of the end of your Grant Period. If the Grant Period is for more than one year, then you need to submit an interim report at the 12-month mark and at the end of the Grant

Period. Your report should provide a narrative explanation of how the funds were expended and how the project worked overall, addressing three main questions:

- What steps in your work plan did you accomplish?
- How much did you spend and what did you spend it on?
- Did you succeed in meeting your project's goals, and how do you know?

The reports don't have to be really long or formal. For grants under \$500, we don't expect more than a couple of paragraphs. For larger grants, we expect more reporting. We hope you'll use the preparation of these reports as a way for your whole group to reflect, celebrate, take stock of where you are, and to re-energize your work.

In answering the question about how you spent the money, you should tally up your expenditures in broad categories, the same ones you used in your proposed budget, or similar categories. Typically, unless the grant is for more than \$500, we don't want to see your receipts and detailed financial records. However, you should keep all your receipts, in case there is any question about your expenditures (*see #4, below*).

To make report-writing easy, and to help you tell your own story so that more people rally behind your work, you should keep any documents or information you have about the project as it unfolds, such as letters and emails from project participants, press releases, newspaper clippings, photographs, videos, etc.

4. You must maintain complete financial records of all grant expenditures; F4DC is entitled to see these records upon request. If your grant is for more than \$500, F4DC may require you to use an F4DC-provided ledger form to record all expenditures, and to turn in this ledger form with your grant report. This requirement is to ensure F4DC's own compliance with tax laws, as well as being part of good, accountable practice.
5. By accepting F4DC's money, your group gives F4DC permission to publicize the grant and the work your group is doing. To enhance the support you receive, we encourage you to publicize your project, and including announcing this grant — if that makes sense for you. For our part, we will list your group, the amount of the matching grant, and a description of your project in our own publicity and reporting materials. Write-ups might appear on the F4DC Website (f4dc.org) and in news releases, annual reports, and the like.
6. If your group's tax-exempt status changes during the time period of the grant, you must immediately notify F4DC. The same is true if the tax status of a fiscal sponsor changes. Again, this is to keep both you and us on the right side of the laws that govern foundations and non-profits. Also, if your organization changes in a way that affects your ability to complete the project for which the grant was made, you must notify us immediately. We'll work with you to figure out the best

way to proceed.

7. If your group receives a grant from F4DC, F4DC has no obligation to provide any other support to your group or the project. In addition, accepting funds from F4DC does not make the receiving organization a subsidiary of F4DC or in any way the legal responsibility of F4DC. Similarly, accepting grant funds from F4DC does not put the receiving organization under the control of F4DC, legally or otherwise. The only legal obligations that exist between the two organizations are those listed on the Grant Agreement. For groups that are awarded matching grants, we hope we'll be seen as helpful partner. That partnership may take many different, freely chosen forms over time, including mutual aid, teaching, and learning, as we work together to build authentic grassroots democracy in our communities.