# Matching Grant Programs
## Guideline Packet

## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contents</td>
<td>1</td>
</tr>
<tr>
<td>Basic Information</td>
<td>2</td>
</tr>
<tr>
<td>What's in this packet?</td>
<td>2</td>
</tr>
<tr>
<td>Mission of the Fund for Democratic Communities</td>
<td>2</td>
</tr>
<tr>
<td>Purpose and General Method of F4DC’s Matching Grant Programs</td>
<td>2</td>
</tr>
<tr>
<td>What do we mean by &quot;grassroots fundraising?&quot;</td>
<td>3</td>
</tr>
<tr>
<td>Steps in the F4DC Matching Grants Process</td>
<td>3</td>
</tr>
<tr>
<td>F4DC’s Matching Grant Process Has Changed!</td>
<td>3</td>
</tr>
<tr>
<td>A Little More Explanation of each Step</td>
<td>4</td>
</tr>
<tr>
<td>Who and What We Fund</td>
<td>5</td>
</tr>
<tr>
<td>Organizational Eligibility Requirements</td>
<td>5</td>
</tr>
<tr>
<td>Funding Priorities</td>
<td>6</td>
</tr>
<tr>
<td>What We Do NOT Fund:</td>
<td>6</td>
</tr>
<tr>
<td>F4DC Criteria for Evaluating Grant Requests</td>
<td>7</td>
</tr>
<tr>
<td>When and How Are Grants Made?</td>
<td>8</td>
</tr>
<tr>
<td>Application Instructions</td>
<td>9</td>
</tr>
<tr>
<td>Information About Your Group or Organization</td>
<td>9</td>
</tr>
<tr>
<td>Basic Info About This Matching Grant Request</td>
<td>9</td>
</tr>
<tr>
<td>Detailed Info About for Work for Which You’re Seeking Funding</td>
<td>10</td>
</tr>
<tr>
<td>Budget and Funding for the Work</td>
<td>11</td>
</tr>
<tr>
<td>Tax Status of Your Organization</td>
<td>12</td>
</tr>
<tr>
<td>The Grant Agreement</td>
<td>12</td>
</tr>
<tr>
<td>Do Your Fundraising</td>
<td>13</td>
</tr>
<tr>
<td>Grassroots Fundraising Matching Grant</td>
<td>13</td>
</tr>
<tr>
<td>Recurring Donors Matching Grant</td>
<td>13</td>
</tr>
<tr>
<td>Submitting Fundraising Documentation</td>
<td>14</td>
</tr>
<tr>
<td>Grant Disbursement and the Grant Activity Period</td>
<td>14</td>
</tr>
<tr>
<td>Grant Reporting</td>
<td>15</td>
</tr>
</tbody>
</table>
Basic Information

What’s in this packet?

This document provides detailed information about the Fund for Democratic Communities (F4DC) and its grant-making policies and guidelines, so that grant-seekers have the tools they need to request funding. It begins with basic information about F4DC’s matching grant programs, 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 is a private foundation that 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; and nurtures the growth of authentic democracy.

Purpose and General Method of F4DC's Matching Grant Programs

It is critical that we leverage every dollar we have for the greatest possible impact. As environmental, economic, and social systems collapse around us, it is more important than ever for people to organize themselves to create and sustain new kinds of institutions that respond to emerging challenges with flexibility and resilience. For these reasons, we offer two matching grant programs to encourage grassroots groups to grow their fundraising capacity and build stable, strong bases within their communities: (1) the Grassroots Fundraising Matching Grant program, and (2) the Recurring Donors Matching Grant program.

**Grassroots Fundraising Matching Grant:** For approved groups and projects, we will match – dollar-for-dollar – money raised through grassroots efforts. Donations up to $100 are eligible for match. Funds raised from foundations, agencies, and government sources will not be eligible for matching. Grants of this type are typically in the range of $2,500 to $5,000.

**Recurring Donors Matching Grant:** This program offers organizations an incentive to build recurring donor programs within their overall fundraising effort. For every donor (up to 60) making a recurring donation of $5 or more, your group will receive $100 from F4DC, for a maximum of $6,000.

To determine whether you should apply for the Grassroots Fundraising Matching Grant or the Recurring Donors Matching Grant, please call or email us at 336-497-1854 or grants@f4dc.org. We usually recommend that first time grant-seekers start with the Grassroots Fundraising Matching Grant. Once you’ve built and demonstrated your capacity for grassroots fundraising in general, it may be appropriate for you to apply for a Recurring Donors Matching Grant.
Whichever type of grant you apply for, your organization is free to develop donor outreach efforts as you see fit. Some groups may hold short “bursts” of outreach efforts and communication several times during a given period; others may use longer duration campaigns to build donor bases.

When F4DC makes a grant, we are excited to play a part in nurturing a group’s growth and success. But we are well aware that our financial support, while important, is not the main thing that makes a difference. It is the good ideas and collective hard work of people struggling to make their community a better place to live. Our matching grant programs are intended to help groups build sustainable funding practices that will support their good ideas and work.

**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.

**Steps in the F4DC Matching Grants Process**

**F4DC’s Matching Grant Process Has Changed!**

F4DC has been making matching grants for more than six years, and we’ve learned quite a bit about where grant-seekers need help to understand how the program works, the kinds of work we support, and the mechanics of the process. The steps listed below reflect all this learning, and represent a new process, as of May 2016.

Even if you have received a matching grant from us in the past, please review these steps BEFORE you submit your next grant application. The first important change is that we now require each grant-seeker to speak with us directly – via email or phone – BEFORE submitting their grant application. The second change of note is that we are separating the submission of documentation of funds raised from the application itself.

Please follow the sequence of steps below:

1. Call or email us to discuss your proposed grant
2. Complete and submit a grant application for final approval
3. Sign a grant agreement
4. Do your grassroots fundraising during the agreed-upon Fundraising Period
5. Submit documentation of the funds you raised
6. Receive the Matching Funds
7. Do the work and spend the grant funds during the Grant Activity period
8. Send a Grant Report to F4DC

A Little More Explanation of each Step

1. **Call or email us to discuss your proposed grant.** If you received a grant from us in the past, you should directly reach out to the F4DC staffer who handled your previous grant. Otherwise, you can reach us on our main office line (336-497-1854) or by email at grants@f4dc.org. In talking with us ahead of submitting your grant application, we will work out a number of things:
   - Whether your organization and proposed work are eligible for a matching grant
   - The maximum amount of matching funds we are able to commit to this particular grant request
   - Which type of matching grant: Grassroots Fundraising or Recurring Donor
   - Which staff person at F4DC will bottomline your grant and be your point of contact
   - Fundraising Period and Grant Activity Period for this grant

<table>
<thead>
<tr>
<th>The Fundraising Period</th>
<th>is the time during which your group will raise money for a matching grant. The Grant Activity Period</th>
<th>is time when your group will carry out the work you are raising money to fund.</th>
</tr>
</thead>
<tbody>
<tr>
<td>For example, your organization may apply for a matching grant to help fund a summer camp program for youth. You will be raising money from February 1 through April 30. This is your Fundraising Period. The summer camp program starts on June 1 and runs through July 31. This is the Grant Activity Period.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Fundraising period should not overlap with the Grant Activity Period more than one calendar month.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. **Complete and submit a grant application for final approval.** You can download the Matching Grant Application from F4DC’s website, and follow the guidance in this document to help you answer its questions. If you have spoken with us ahead of time, completing the grant application shouldn’t be too hard. You’ll describe your group, the work you want to fund, and your plan for doing the fundraising that F4DC will match.

3. **Sign a grant agreement.** Once we have approved your grant application, we’ll prepare and send you a Grant Agreement based on the information you provided in your Grant Application. Two members of your organization should sign this Grant Agreement and return it to us.
4. **Do your grassroots fundraising during the agreed-upon Fundraising Period.** This is when you carry out the fundraising plan you described in your grant application.

5. **Submit documentation of the funds you raised.** Using the Fundraising Documentation Cover Sheet, send us documentation that shows how much grassroots money or how many new recurring donors you collected during the Fundraising period. You must submit this documentation within 15 days of the end of your Fundraising Period.

6. **Receive the Matching Funds.** F4DC will verify your documentation and then write a check to your organization for the amount that matches all eligible funds/donors up to the amount agreed upon in Step 1. 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 that organization and they will disburse the funds to you.

7. **Do the work and spend the grant funds during the Grant Activity Period.** This is when you do the work that you wanted to fund in the first place. All F4DC grant funds must be used for the purposes outlined in the Grant Application and Grant Agreement. 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 Activity Period must be returned to F4DC unless written permission has been granted for your organization to keep the funds.

8. **Send a Grant Report to F4DC.** Within 30 days after the end of the Grant Activity Period, send us a written report describing the work that was made possible by our grant, following the guidance in this document.

---

**Who and What We Fund**

**Organizational Eligibility Requirements**

Grantees 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 this IRS tax exempt status.

Funding Priorities

TO BE ABSOLUTELY CLEAR ABOUT THE WORK WE PRIORITIZE: Our focus is not on
service projects (good people helping less fortunate folks), but rather on projects connecting
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 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.

F4DC gives priority to groups in the US South. In some cases, F4DC will make 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 South.

F4DC believes that bringing up the next generation of leaders by integrating them appropriately
into 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 organizations and projects engage and relate to younger folks.

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.

**F4DC Criteria for Evaluating Grant Requests**

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 region in which F4DC focuses? If not, is there potential for grassroots democracy in the region 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**

- Does the group have a plausible plan to reach its grassroots fundraising goal?
- Will the group raise the funds by connecting to the people who are most directly affected
and concerned with the issue on which they are working?
• Will the fundraising activities deepen connections within the community?
• Have the fundraising activities deepen the group’s capacity to sustain itself for the long haul?

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

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 work?
• 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 work?

Potential for Sustained Engagement/Deepening of the Work over Time
• When this phase of work 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 work lend itself to expansion, enhancement, and replication?

When and How Are Grants Made?
F4DC considers matching grant requests on a rolling basis, as we are contacted, and as long as F4DC still has funds in its yearly budget for grants. F4DC will not consider requests submitted without adequate lead-time before the requested funds are needed. You must contact us (Step 1) well in advance of the period when your work would be carried out. This allows us time to work with you on your application and ensures you have the time needed to do your fundraising and submit all the required documentation. On rare occasions, we will match funds raised wholly or partially before the initial contact and our acceptance of the grant application, but this is the exception, not the rule. If your project is complicated and requires more information or deliberation, submit your application even earlier.

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.
Application Instructions

There are five sections on the grant application:

1. Information About Your Group or Organization
2. Basic Info About This Matching Grant Request
3. Detailed Info About the Work for Which You’re Seeking Funding
4. Budget and Funding for the Work
5. Tax Status of Your Organization

Information About Your Group or Organization

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

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

Focus/Mission (required). In no more than one sentence, name the mission or focus of your group.

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 would like to know about it.

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

Basic Info About This Matching Grant Request

This section is where you provide summary info about the request you are making.

Date of the Grant Application: Write the date you fill in the application form.

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 you and we need a shorthand way to refer to it as we discuss your grant. and refer to it in our records and publicity materials. The name does not have to be catchy, but it should be accurate. If you are seeking general operating support for an organization that is up and running, then you should title the project “General operating support.”
Which matching grant program are you applying for? (required). Check the box that matches what we agreed to in the Step 1 conversations/emails. (See the Basic Information section above for a description of the two programs.)

Agreed maximum for this match request. Write down the maximum amount of funding F4DC committed to in the Step 1 conversations/emails.

Fundraising Period. Write down the Fundraising Period that we agreed to in the Step 1 conversations/emails. This is the period of time in which you will be raising funds or recruiting new recurring donors eligible for this matching grant.

Grant Activity Period. Write down the Grant Activity Period that we agreed to in the Step 1 conversations/emails. This is the period of time in which you will be doing the work and expending the funds applied for. This period should not overlap the Fundraising Period by more than one month.

Detailed Info About for Work 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.

Description of the issue or opportunity you are 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 will do. Please describe the specific work plan you 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.
Budget and Funding for the Work

Total estimated cost of project. The key word here is “Total.” We are looking for a single number representing the grand total you will spend to accomplish your goals. This figure may be larger than the amount you are raising in eligible and matching funds.

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. NOTE: If you are applying for general operating support, you can attach a copy of your organization’s annual budget, and simply write, “See attached budget” in this section. This helps us see the role that our grant plays in the larger finance picture for your organization.

Overall Sources of Funding. First, tell us how much money you expect to raise via grassroots fundraising or recurring donors during the Fundraising Period. Second, indicate how much you are expecting to get from us in matching funds. (This should match the amount you wrote on page 1 in answer to “Agreed maximum amount for this match request.”). Then list other sources of funding that make up the total you require to meet your total expenses.

NOTE: The Total of Expenses should match the Total of Overall Sources of Funding.

Once you’ve listed the expenses and sources of funding, use space at the bottom of the page to explain how you arrived at any figures that are not obvious. For example, if you are 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:

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

Fundraising Plan. The last question in this section asks you to describe your plans to raise grassroots funds, either directly through donations of $100 or less or through a recurring donor program that signs up new donors who commit to donating at least $5 per month to your organization on an ongoing basis.
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), and provide your EIN number. Also, attach a photocopy of your tax-exempt notice from the IRS.

If you have applied to the IRS for 501(c)(3) status, but you have not received your approval letter yet, ask an F4DC staff person about how to proceed. 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 will 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 and their EIN number. You or they should attach a photocopy of their tax exemption letter from the IRS.

The Grant Agreement

Within 10 days of receiving your grant application, we’ll look it over to make sure it’s in accord with the agreements reached in the Step 1 conversations or emails. (If you have submitted a proposal but have not heard from us within ten days, please contact us to make sure we received it!) We may suggest some re-writes or clarifications so the application sufficiently matches our understanding of the work we’ll be funding, the amount of funding, the type of fundraising, and so on. Once we finalize the Grant Application, it becomes part of the Grant Agreement, which is the next step.

On the basis of the final Application, we’ll prepare a Grant Agreement. Two members of your organization should sign this Grant Agreement and return it to us. One of the ways that we ensure that we’re funding viable groups and projects (and not individual efforts) is by requiring two signatures on the Grant Agreement. Both people are to be fully aware of the contents of the Application and the Agreement that references the Application. These signatures are how we make sure that you and your group takes responsibility for ensuring grant funds are well spent. So signing the Grant Agreement is a solemn thing. Do not overlook its importance, and make sure you understand what you are agreeing to before you sign it! If you have any questions or concerns about the terms in the Grant Agreement, call your F4DC staff person!
We need to have your signed Grant Agreement on file in our office to move forward with funding your request, so sign and return it to us as soon as you can. If you begin your fundraising without having returned a signed grant agreement to us, we cannot guarantee that we will match the funds you raise!

Once we have your signatures on the Grant Agreement, we’ll sign a copy and return it to you, so you have our signature as well.

Do Your Fundraising

By developing a broader base of donors that you can return to more often for support, you can build more resilience and independence into your funding stream. Our matching grant programs are intended to help you do just this – build a stronger and larger donor base.

Our grantees report that telling potential donors about the matching funds helps them raise more money. You are free to tell your donors that you have a matching grant from F4DC as you see fit. As you go about developing your fundraising effort, make sure you are keeping materials to share with us later when you submit documentation.

Grassroots Fundraising Matching Grant

This program is intended to help you build out your base of lower-dollar donors who typically can give amounts up to $100. We will match these grassroots donations up to $100. The total of these grants are typically $2,500 to $5,000. We’ll discuss your needs and what makes sense for a potential grant when you contact us initially.

If you need some help thinking through how to start a grassroots fundraising program, please refer to the documents found under the resources section on our website here: http://j.mp/F4DCgrants.

Recurring Donors Matching Grant

If you receive a Recurring Donors Matching Grant (RDMG) we will award you $100 for every new donor, up to 60, making a recurring donation of $5 or more. Many organizations offer donors an option of donating monthly, however the cycle is up to you. If you have current recurring donors, we will not match increases to their donations. We are interested in seeing your organization grow your base of recurring donors.

If you are unsure if a recurring donor fundraising program is right for you, we recommend the webinar from the Grassroots Institute for Fundraising Training (GIFT) titled “Building a Successful Monthly Sustainer Program”. In this webinar the Media Mobilizing Project describe
the development and launch of their highly successful recurring program. You can find that webinar at the GIFT website here: http://j.mp/DonorMonthly.

**Submitting Fundraising Documentation**

Once you’ve done your fundraising, you will need to submit documentation to us so that we can process your grant funds. The guidelines below describe the documentation we expect from you. You may request up to two (2) payouts during the total period of the grant. For each payout you must provide documentation.

*Please note: We will only issue a payout for eligible funds*

**Grant Disbursement and the Grant Activity Period**

When you finish and document your fundraising, F4DC will disburse funds by writing a check to your group or fiscal sponsor. Usually, this is the start of the Grant Activity period, which is when you can spend the funds. If the check is received after the official start date for the Grant Activity Period, F4DC funds can still be used to cover expenses incurred before the check arrived, even if they pre-date the check – as long as they were incurred during the Grant Activity period.

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

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.

You have to use the grant funds during the Grant Activity Period listed in your grant application and in the Grant Agreement. If there are unused funds remaining at the end of the Grant Activity 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.

**Grant Reporting**

Grantees 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, including questions:

- Clear explanations of how the grant funds were expended;
- Summary of the major work done by your group, both within the scope of the grant and other work related to this;
- An honest assessment of progress made through this grant along with the challenges and dilemmas faced in regard to the major objectives;
- Lessons learned from your work that will inform your group’s future development and might be useful to other groups involved in similar movement-building efforts.

To further clarify, “laundry lists” of accomplishments, numbers of people served, or programs offered may be included but will not be considered sufficient. We're looking for real reflection here!

The reports do not have to be really long or formal. For grants under $1,000, we do not expect more than a couple of paragraphs. For larger grants, we expect more reporting. We hope you will 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. The Grant Agreement requires you to keep all your receipts, in case there is any question about your expenditures. You must maintain complete financial records of all grant expenditures; F4DC is entitled to see these records upon request. This requirement is to ensure F4DC’s own compliance with tax laws, as well as being part of good, accountable practice.

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.