



# Effective Grantmaking

To inspire North Carolinians to make lasting and meaningful contributions to their communities.

A stylized teal graphic on the left side of the page depicts a hand holding a heart. The hand is rendered with simple white outlines and teal fills, with fingers slightly curled. A white heart is held in the palm, with a thin white line representing a stem or cord extending from it. The background of the hand graphic is a solid teal color.

# **Introductions**

# A team to support your community



## COMMUNITY LEADERSHIP OFFICERS

Manage local affiliate foundation board success, strength and growth.



## PROGRAM OFFICERS

Manage nonprofit outreach, engagement and affiliate grantmaking and scholarships.



## DONOR ENGAGEMENT OFFICERS

Engage and support fundholders in fulfilling their charitable giving and grantmaking and supporting their philanthropic goals.



## DEVELOPMENT OFFICERS

Support new fund development, legacy giving donors, and professional advisors.

# Program Officers

EAST



Anne Sorhagen

CENTRAL



Kelly Lee

WEST



Shari Williamson

# Today's Presenters



Tyran Hill  
Director of Community Investment



Doug Perry  
Grants Manager

# Affiliate board orientation sessions

January	Overview
March 19 <sup>th</sup> or 20 <sup>th</sup>	Being an effective grant-maker
May 21 <sup>st</sup> or 22 <sup>nd</sup>	Inspiring Philanthropy - Asset & Fund Development
July 16 <sup>th</sup> or 17 <sup>th</sup>	Promoting Philanthropy
September 17 <sup>th</sup> or 18 <sup>th</sup>	NCCF Statewide Leadership Putting work into action

# Goals of the orientation program

## Engage

Engage you in your new roles

## Learn

Help you develop a robust understanding of community foundations, the service model and affiliate board member responsibilities

## Inspire

Gain inspiration for your board service

## Connect

Experience connection to one another across the state and to NCCF



# **Community Grantmaking**



# Goals for today's overview

Goal 1. Understand the affiliate community grantmaking program and the application process.

Goal 2. Understand the program's eligibility guidelines.

Goal 3. Understand the affiliate board's role in the decision-making process including tools for review and evaluation of proposals.

# Community Grantmaking Overview

Network of 53 affiliates across the state

Each having an advisory board with local knowledge of their community's needs

Recommending grants to charitable organizations meeting those needs

Annually

1,200 applications received

500 grants issued

\$1 million impact

across the state



# What do we mean by a grant?

- An agreement between the funder and the recipient organization for funding provided toward a specific charitable benefit in the community.
- The charitable work is outlined in application proposals submitted by charitable organizations.
- Proposals are evaluated and grant decisions made at the local level by NCCF affiliate advisory boards.

# Types of grant funding

## General operating support or program/project support

Grants may be made to charitable organizations either to support their general operations or specific programs and projects they operate.

- **General operating support** is unrestricted funding the organization may use toward their overall mission. The funding allows for the most flexibility as the organization may use as they best see fit, and their most identified need.
- **Program/project support** is funding targeted at a specific program, project or event the organization is operating.

# Where does the funding come from?

- **Unrestricted affiliate endowed funds**
  - Each affiliate has an unrestricted endowed fund from which it makes grants from the allowed spendable revenue each year.
  - Annual Chairman's Challenge Campaign to grow the endowments.
- **Other board managed funds**
  - Some boards have other endowments under their management for which they have grant advising authority. Some of these funds are also unrestricted when it comes to funding purpose, while others have restrictions on which charitable purposes they are allowed to fund.

A teal graphic on the left side of the page shows two hands cupping a heart. The hands are rendered in a simple, stylized manner with white outlines and teal fill. The heart is also teal and positioned in the upper left quadrant of the hand graphic.

# **Application Process and Guidelines**

# Application Season

- Communication to affiliate grants chairs early calendar year outlining the schedule for their application and the funds they have available for grantmaking.
- Applications are staggered across all affiliates at different times.
- Applications are open for a full month. (4 weeks)

# Application Process

Applications are all online, via the application portal.

- *NCCF is available for technical assistance with the online platform; and with help answering questions about the application and the program.*

After the close of a cycle (*noon on the closing date*), applications are reviewed by NCCF for eligibility.



## Logon Page

Email Address\*

Password\*

Log On

Create New Account

[Forgot your Password?](#)

## Grants

### Welcome to NCCF's online grants system!

#### First time here?

Click "Create New Account". If you need assistance, please refer to the [Module I](#) training materials. Be sure to keep this login information for your organization's records.

*TIP: This email address is the one we will use to communicate with you if we have questions, which sometimes require immediate response. We suggest using an email address that is available to anyone at your organization who needs to access the application.*

#### Been here before?

If you have already used our new online grant system, but have forgotten your password, please click "Forgot Your Password?" and follow the instructions.

If you have applied to one of NCCF's grant programs before, but not using this new system, please refer to the "First time here?" instructions above.

#### Not sure?

If you believe your organization already has a profile but you are unsure of the login information, DO NOT create a new profile. Doing so could result in loss of historical information for your organization. Instead, please contact [tech@nccommunityfoundation.org](mailto:tech@nccommunityfoundation.org). Be sure to include your tax ID number (EIN) in the message.



# NCCF Guidelines

## Eligible organizations are

those deemed **charitable** by the IRS

- 501(c)(3) nonprofit public charities
- Government entities
- Churches/religious institutions

those **serving the county/region** of the local affiliate

## Applications must be complete

with answers to all required questions

all required documents attached, including the **correct budget form**

and submitted on time by the deadline

# NCCF Guidelines

Proposed work must align with allowed purposes

Funding is not provided for

- Annual fund or capital campaigns
- Political purposes or lobbying
- Loans or reimbursements
- For the direct benefit of named individuals
- Re-granting by the applicant organization
- Activities/operations restricted to members of a particular faith or which promote religious doctrine

# Application Process... *continued*

Application cycle closes one month after opening

NCCF vets applications for eligibility

Eligible applications forwarded to affiliates for evaluation and grant decisions

Within 2 weeks of application closing



# **The Role of Board Members**

# Reviewing Grant Proposals

01

Does the proposal address an existing community need - something that is critical “right here, right now” in your community?

02

Are the goals and objectives clear and realistic?

03

Do the proposed activities support the goals and objectives outlined and within a reasonable timeframe?

04

Does the organization have the capacity to implement the work?

05

Are the expenses clear as to how the money will be spent? Is the budget aligned with the identified needs?

# Grants Committee Process

The grants chair and committee members receive access information and other materials



The program officer and grants chair schedule a meeting ahead of the full board meeting



The grant committee convenes to discuss all applications and make funding recommendations



The committee recommendation goes before the full board for consideration and a final vote



The program officer works with the internal grants department to distribute funds and communications to all applicants

# No Committee Process

All board members  
receive access  
information and  
other materials



The full board  
convenes to discuss  
all applications and  
make funding  
decisions



The program officer  
works with the  
internal grants  
department to  
distribute funds and  
communications to  
all applicants

# NCCF Conflict of Interest Policy

- Any committee or board member (spouse or partner) who has a relationship with an organization that has applied for a grant or could benefit personally or professionally from an organization receiving a grant, will announce the conflict and recuse himself/herself/themselves from decision- making about that applicant.
- Be certain to document that any conflict of interest was resolved in the minutes.
- Board members should not write applications on behalf of non-profits during the grant cycle





# **Effective Grantmaking**

# Criteria for Success

Focus Area 3. Effective Grantmaking	Status	Complete by	Board Lead
Goal 1. Understand what it means to be an effective, impactful grant maker			
Strategy 3: Appoint a grants chair to work in partnership with regional program officer and lead the affiliate’s grantmaking efforts.			
Goal 2. Get to know and engage with local, regional and statewide nonprofit organizations doing work in your community			
Strategy 3: Introduce nonprofits to your regional program officer and learn about organizations from your regional program officer.			
Goal 3. Understand community needs and use needs assessment in grantmaking			
Strategy 1: Review Community Needs Assessment (CNA) and learn more about current needs in community. Attend NCCF education			

# Grantmaking Tools & Resources

## Preparation:

1. Grantmaking Guidelines
2. Follow Up Reports
3. CNA's



## Evaluation:

1. Rating Sheet
2. Guiding Questions
3. Follow Up Reports
4. CNA's
5. Your expertise & knowledge



## Measure Impact:

1. Follow Up Reports
2. Nonprofit Educational Visits

# Using the Community Needs Assessment

- Understand the data and the agencies that provided it
- Review the data and identify the unmet services and needs of your community that will focus and impact in grantmaking
- Lead conversations with the committee about the data findings
- Share the CNA throughout your community



## Community Needs Assessment



## Community Needs Assessment

### Also consider....

- Have recent events - in the last few years - affected the needs of your community and the needs of local non-profits?
- Who are the people in your community who have needs not currently being met and what are those needs?

# How to Access CNAs Online



[HOME](#)

[GIVE](#)

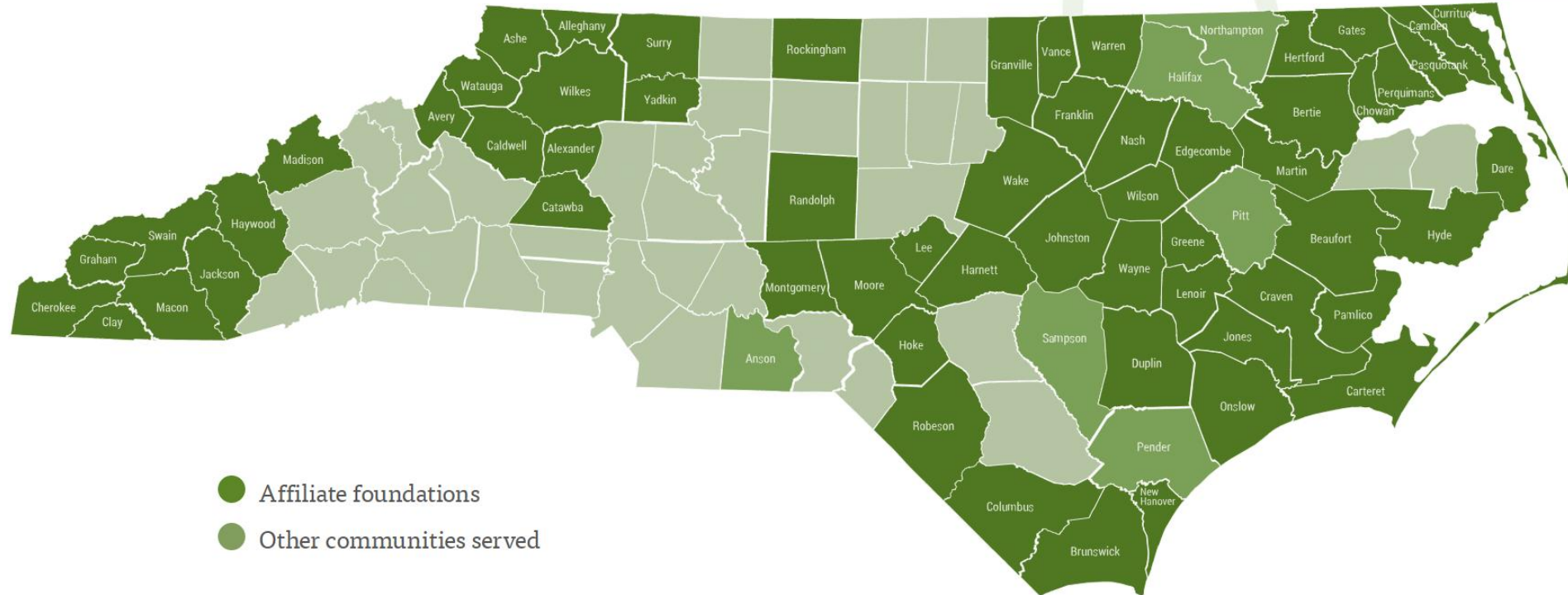
[CREATE A FUND](#)

[APPLY](#)

[COMMUNITIES](#)

[ABOUT US](#)

[GIVE NOW](#) 



# How to Access CNAs Online



[HOME](#) [GIVE](#) [CREATE A FUND](#) [APPLY](#) [COMMUNITIES](#) [ABOUT US](#)

[GIVE NOW](#) 

To supplement their first-hand knowledge of the community, the board annually reviews a [Community Needs Assessment](#) with county-specific data provided by respected, nonpartisan sources and trusted community partners.

## Meet our board

Our affiliate is an all-volunteer organization with advisory board members who reflect the community we serve.

[OUR BOARD](#)

## Contact us

We're here to help! Connect with the NCCF staff member in your community.

[GET IN TOUCH](#)

# How do our local nonprofits know about our grant opportunities



Grants Available Email



Website



Social Media Toolkit &  
NCCF Social Media



Grantseeker  
Workshops



# Affiliate Grant Pages on the Web

The Watauga County Community Foundation is a growing family of philanthropic funds, source of grants for local causes and partner for donors. WCCF was founded in 1993 and is led by a local volunteer advisory board that helps build community assets through the creation of permanent endowments, makes grants and leverages leadership – all for the benefit of Watauga County.

The WCCF, through the NC Community Foundation, makes it easy to become a philanthropist, whatever your means or charitable goals. You can open an endowment for your favorite cause at any time – or contribute to an

- Apply for Grants
- Community Needs Assessments
- Grant Cycle Dates
- Grant amount ranges
- Grantmaking Guidelines



# How do we promote our grants in community?

## Grants awarded



Home / Communities / Northwestern / Watauga County Community Foundation / Grants awarded

### • 2023 grants awarded •

The Watauga County Community Foundation awarded \$53,050 to the following local nonprofit organizations from its community grantmaking fund and other board-advised funds:

- \$5,710 to Back 2 School Festival, Inc. for Back 2 School Festival



- [Facebook](#)
- [Instagram](#)
- [LinkedIn](#)
- [Twitter/X](#)

# Recap Slide

Goal 1	Understand the affiliate community grantmaking program and the application process.
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# What's next?



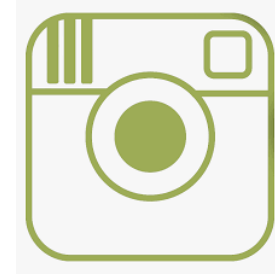
2<sup>nd</sup> quarter board meetings



Fund Development orientation sessions in May



Registration emails will be sent out a few weeks prior to those dates



**Connect with NCCF**

# Q&A

NORTH CAROLINA  
COMMUNITY FOUNDATION

