

# Revised Grant Guidelines as of September 2010

*Grant Application Deadlines: March 1 and September 1*

## **Letter from the President of the Gordon Elwood Foundation:**

As a small but highly engaged foundation in southern Oregon, the Gordon Elwood Foundation continuously evaluates what we can do to support the critical safety net of social services that are needed in our region, while catalyzing and stabilizing a wide array of community service innovations that are a hallmark of our communities.

Despite the challenging economic climate that has decreased our foundation's ability to fund the growing number of worthy grant proposals, our commitment to investing in southern Oregon's youth, individuals, families and communities remains strong. For most foundations the extreme market downturn of 2008 has its greatest effect in the 2009 through 2011 fiscal years. For the Elwood Foundation this reality is significantly impacting our grant application cycle and process. At least through 2011, we anticipate being able to fund significantly less proposals than we did prior to 2008.

It is with our non-profit community's limited resources in mind that the Elwood Foundation will review a very limited number of proposals. The Foundation's Grants Committee will only review grant applications for non-profit organizations that have **discussed their grant proposal idea before the September 1st or March 1st deadline** with Kathy Bryon, Executive Director. We are very interested in keeping abreast of service delivery needs and innovations, while not wasting the valuable time of non-profit staff and volunteers.

The preferred timeframe to call Kathy is three weeks to two months prior to the grant application deadline. (During the 2011 summer period, the best time to call would be BEFORE June 17 and AFTER July 25<sup>th</sup>. If you would like to schedule an appointment to discuss your grant application, please call Kathy at 541-282-0643 or e-mail her at [Kathy@GordonElwoodFoundation.org](mailto:Kathy@GordonElwoodFoundation.org). Last-minute telephone calls for pre-application guidance are strongly discouraged.

A small handful of proposals will be invited to apply for grant funding Kathy's conversation and assessment regarding the proposal concept. Grant applications received on or before a grant application deadline from organizations who have not been invited to apply for funding will not be considered.

For more information or to discuss a grant proposal, please call Kathy at 541-282-0643.

Very sincerely yours,

Mike Heverly  
President, Board of Directors  
Gordon Elwood Foundation



**g o r d o n e l w o o d**  
F O U N D A T I O N

*Investing in Southern Oregon's youth, individuals, families and communities.*

## **Grant Guidelines and Application Procedures**

### **Foundation Vision**

Jackson, Josephine, Klamath and Curry Counties are home to successful youth and individuals, thriving families and communities. Gordon Elwood Foundation leverages and invests talent and financial resources in southern Oregonians.

- Youth and individuals thrive in school and in life.
- Individuals and families live independently and interdependently with dignity and respect.
- Communities evolve as situations of the people who live, work and play in these communities change over time.
- Youth, individuals, families and the organizations that serve them are connected, creating a unique and sustainable community fabric.

### **Organizational Values: We are inspired to demonstrate...**

**Financial Stewardship** by creating from Gordon's financial legacy a Foundation Vision and Mission supported by prudent investment and thoughtful disbursement of funds.

**Social Stewardship** by touching lives in a proactive and interactive manner.

**Integrity** by living the mission through employing strategies of patience, learning, teaching, compassion, caring, and love.

**Investment in the Journey** by thinking, acting, and committing resources to creating and sustaining the GEF Values, Mission and Vision.

**Individuality** by being innovative.

## **Foundation History and Background**

Gordon Elwood, a lifelong native of the Rogue Valley, lived a remarkably Spartan existence. Beginning as a paper delivery boy at the age of twelve, Gordon scrimped and saved and invested the bulk of his earnings through years of labor as a fruit picker in the Valley and forty years as a television technician. After retiring, he continued his frugal lifestyle by collecting recyclable cans and bottles for their deposit value.

When he died at age seventy-nine in 1999, Gordon left a surprisingly large financial estate of \$9 million to benefit his beloved southern Oregon community. In his final days, Gordon expressed his philosophy thusly:

*"Everyone is put on this earth to accomplish something, and not just for their own self. Through this foundation I feel I have made my life worthwhile to others."*

The Gordon Elwood Foundation is committed to fulfilling Gordon's legacy by offering a *hand up* to those in need. We are pleased to honor his memory in service to the southern Oregon community.

## **Foundation Purpose and Geographic Scope**

The Gordon Elwood Foundation is a private foundation that distributes grants for educational, human service, and other charitable purposes, with a principal geographic focus in Oregon's Jackson, Josephine, Klamath and Curry counties.

### **Community Funding Goals:**

#### **Children and Individuals**

- Support children and individuals by providing access to the education and life skills they need to be successful in life.
- Reduce obstacles to success in the classroom.
- Reduce economic and cultural barriers to educational and training opportunities.
- Create incentives for staying in school and achieving personal potential.
- Increase youth and individual engagement and sense of responsibility with and to larger environment and community.

#### **Individuals and Families**

- Support adults and families to have access and support for education and life skills they need to be successful in life.
- Reduce obstacles to succeeding in the workplace or in higher education and training.
- Reduce economic barriers to educational opportunities and training for self and family.

### **Community Non-Grant Support Goals:**

- Leverage resources to bring attention to community crisis & vitalization opportunities.
- Create opportunities for new thinking and innovative approaches on community issues.
- Partner with private and public funders for greater learning and impact on identified community issues.
- Act as convener to surface underlying issues of community issues and the opportunity for creative resolution.

## Eligibility Considerations and Requirements

Grants from the Foundation may be made to qualified nonprofit, tax-exempt, charitable organizations and public entities in Oregon's Jackson, Josephine, Klamath and Curry counties. Grants are **not** made to or for any of the following purposes:

1. Individuals.
2. Projects seeking to influence elections, political candidates, or legislation.
3. Organizations without a 501(c) 3-tax status designation who are using another nonprofit organization as a fiscal or umbrella agent.

The Gordon Elwood Foundation makes grants averaging \$5,000–\$10,000. The Foundation prefers to make grants that make a direct and significant impact on the people the project serves. The Foundation has two grant cycles per year. **The deadline to submit a grant is March 1 or September 1.**

## Application Procedures

1. Review the Gordon Elwood Foundation funding goals and eligibility requirements to determine if your charitable activity is within our guidelines.
2. An applicant's organization must have received tax-exempt status as stated in Section 501 (c) 3 and 509 (a) 1 of the Internal Revenue Code, or the equivalent for public entities. The use of another organization as a fiscal agent for a project is not acceptable.
3. If your charitable activity is within our guidelines and your organization has received tax-exempt status as stated in Section 501 (c) 3 and 509 (a) 1 of the Internal Revenue Code, please call Kathy Bryon, Executive Director, at 541.282.0643 to discuss your proposed application.
4. After speaking to Kathy, download a grant application form from our website's Downloads page and complete it.
5. Submit one original, signed application and the following materials:
  - Cover letter.
  - Last completed fiscal-year financial statement and balance sheet. (If applying on behalf of a school or school district, please call for special instructions.)
  - Current fiscal-year financial statement and balance sheet. (If applying on behalf of a school or school district, please call for special instructions.)
  - On one page, a detailed budget for the project you are requesting funding for.
  - List of officers and board members with their professional affiliations and phone numbers.
  - Copy of 501(c) or 509(a) tax exemption letter from the Internal Revenue Service; or public school district name and number; or IRS documentation for other publicly supported entity if not a 501(c)3 agency or school.
  - Completed program evaluation logic model tool. See our website's Downloads page for a copy and sample of the form.
  - Board of directors' minutes that demonstrate the board is aware and approves of the grant application being made to the Gordon Elwood Foundation.

Note: To facilitate copying your grant application, please do not staple, use 8 1/2 x 11 white paper, and print on one side only. Do not exceed the space requirements for your answers or use smaller than 10-point font.

6. Proposals that are not complete at the time they are submitted will not be considered.
7. If you want or need proof that we have received your grant application, submit your grant application by United States post mail, certified, with a return receipt requested. We typically send all applicants a courtesy email acknowledging their application shortly after each application deadline.
8. During the grant proposal review process, Foundation staff may contact your organization or persons or organizations that have knowledge of your organization for additional information if such contact is felt to be necessary and helpful to reviewing your proposal.
9. When the determination process has been completed, all applicants will be advised as to the outcome of their proposal requests. Final grant decisions will be announced approximately 12-14 weeks after each deadline (March 1 and September 1). The Foundation cannot expedite a funding decision. All decisions are final.
10. Grant awards are paid upon receipt of the signed agreement. Grantees must submit six-month and end-of-grant-period reports, unless otherwise specified. The final report must include an expenditure report on funds used. The Foundation must receive this before receiving any further grant applications from the same organization.

**Please submit completed grant applications to:**

Gordon Elwood Foundation  
PO Box 4189  
Medford, OR 97501-0156

Grant applications are not accepted via email.

For more information, please call 541.282.0643 or email [office@GordonElwoodFoundation.org](mailto:office@GordonElwoodFoundation.org).