OCF Grantmaking Program Form

This form is for Admins of OCF hosted Collectives to propose a Grantmaking Program. Grants must be carried out in accordance with the Grantmaking Policy.

Please note, grants are a specific and narrow method for making certain kinds of payments that are not taxable income to the recipient, but carry a high bar for compliance and reporting due to IRS requirements. If the taxability issue is not a concern, we encourage you to ask the payee to submit a normal invoice expense instead (in which case you do not need to fill out this form or the Grant Proposal Form).

Once your Grantmaking Program has been approved, submit individual grants here: https://forms.gle/uDxkMNfh1EipNSY86

Information submitted through this form will be accessed by Open Collective Foundation staff to enable the grantmaking process, and, where required, reported to the IRS. We will not use this information for any other purposes or make it public.

* Required

1. Email *

2. Your name *

3. Collective name *

The Collective or Fund hosted by Open Collective Foundation, whose budget will pay for the grant.

4. Collective link *

URL of the Collective's Open Collective page.

5. I affirm that I have read and agree to follow the OCF grantmaking policy. *

Check all that apply.

☐ Yes

About the grant program

6. Grant category *

We are only able to facilitate grants that fit in these specific categories. For more details about each, please see the Grantmaking Policy.

Mark only one oval.

◯ Hardship: A payment to an individual as a result of a disaster or emergency hardship. Hardship grants may be made to ensure victims have basic necessities, such as food, clothing, housing, transportation, or other necessities.

◯ Study: A scholarship or fellowship grant for candidates for a degree at an eligible educational institution.

◯ Award: A cash prize or award recognizing an individual's past accomplishment in a particular field.

7. **Single-Expense or Multi-Expense?** *

Will grants in this Program disburse each grant in a single expense, or over the course of multiple expenses? All Award grants are Single-Expense.

Mark only one oval.

◯ Single-Expense: Grantees will receive the full amount in a single expense

◯ Multi-Expense: Grantees will submit multiple expenses to receive funds

8. **Please list the eligibility requirements for this grantmaking program** *

The objective criteria used to determine who is in need of and qualifies for the grant, which you will apply to any individual under consideration as a grantee.

_____

_____

_____

_____

_____

9. **Who will select the grantees?** *

List the names of the individual(s) who decided to make this grant to this person.

_____

_____

_____

_____

_____

10. **Grantmaking program purpose** *

What is the intended impact of these grants?

_____

_____

_____

_____

_____

11. **Proposed activities and goals** *

What will grant funds pay for and enable?

_____

_____

_____

_____

_____

12. **Grant timeframe** *

How long will it take for the grant funds allotted to each grant to be fully spent? For all Award grants, select the first option. If more than (12) months, which will require a Grant Report at the one-year mark, please select "other" and enter the timeframe.

Mark only one oval.

( ) One (1) month

( ) Three (3) months

( ) Six (6) months

( ) Twelve (12) months

( ) Other: _____

13. I affirm that the Collective Admin is responsible for reviewing submitted *
Expenses, and will only approve those which are consistent with the grant
purposes and grant agreement.

Check all that apply.

☐ Yes

14. I will ensure that required Grant Updates and Expense Comments are *
published to the Project.

Specific Grant Update and Expense Comment requirements are detailed in the grantmaking policy. They
may be written by the grantee, a Collective Admin, or both.

Check all that apply.

☐ Yes

15. I confirm that no grant funds will be used to influence legislation, to influence *
the outcome of elections, or to carry out voter registration drives.

Check all that apply.

☐ Yes

16. I confirm that no grant funds will be used to pay for goods and services of *
benefit to OCF or the grant-making Collective.

The grant is intended to benefit the grantee and society, not the grantmakers.

Check all that apply.

☐ Yes

17. **I confirm that no grant funds will be paid to individuals or organizations besides** * **the named grantee for each grant.**

The grantee may use grant funds to purchase goods or services in furtherance of the grant purpose, but OCF will only pay grant funds directly to the grantee (who can use the funds to pay others if required).

Check all that apply.

☐ Yes

18. **I understand that if grant funds are used improperly, the grant could be treated** * **as the Grantee's taxable income.**

Improper use means in a way not in accordance with OCF's Grantmaking Policy and the Grant Agreement.

Check all that apply.

☐ Yes

19. **I will ensure that any granted funds not used for the purposes of the grants will** * **be returned.**

If any grant funds distributed under this Grantmaking Program have not been spent to further the grant purpose by the conclusion of the grant timeframe, they must be transferred back to the budget of the grantmaking Collective (whether they are sitting in the Project budget or have been withdrawn by the grantee and need to be repaid).

Check all that apply.

☐ Yes

Next steps
Once this Grantmaking Program has been approved by OCF, we will set things up and provide you with instructions to set up the Grantmaking Program.