

OCF Grant Proposal Form

This form is for admins of OCF hosted Collectives to submit an individual grant. Grants must be carried out in accordance with the Grantmaking Policy.

Fill this out after you have already submitted a Grantmaking Program, it has been approved, and you have already decided to give a grant and have selected a grantee. If you have not submitted a Grantmaking Program yet, you can do so here: <https://forms.gle/a5HYPTbM3dysJSWo7>

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).

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. I affirm that I have read and agree to follow the OCF Grantmaking Policy. *

Check all that apply.

Yes

3. Collective name *

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

4. Collective signer legal name *

Who should we send the Grant Agreement to on your team? Must be an Collective Admin.

5. Collective signer email *

The Collective signer's email address, to which we will send the Grant Agreement for e-signature.

About the grant



6. Name of Grant Program *

What is the name of the approved Grant Program associated with this grant?

7. Grantmaking Program category *

You already told us, but remind the form so it asks the right follow-up questions.

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. *Skip to question 23*

Study: A scholarship or fellowship grant for candidates for a degree at an eligible educational institution. *Skip to question 25*

Award: A cash prize or award recognizing an individual's past accomplishment in a particular field. *Skip to question 27*

8. Is the Grant Program "single-expense" or "multi-expense" *

Again, you already told us, but remind the form so it asks the right follow-up questions.

Mark only one oval.

Single-expense: grant funds will be withdrawn by the grantee in a single expense

Multi-expense: grant funds will be withdrawn by the grantee for multiple expenses

Grant Projects

Grants must be associated with a Project on Open Collective, so its budget can be tracked.

If your Grantmaking Program is made up only of single-expense grants, you can make multiple grants under a single Project on the platform. If grants will be associated with multiple expenses, each will need their own Project.

To create a Project, scroll to the Projects section of your page and click "new project". You may need to first enable Projects in your profile page settings if they have been switched off.

9. Link to Grant Project *

What Project is this grant associated with?

10. Grant Title *

Please make this the same as the name of the associated Expense (for single-expense grants) or Project (for multi-expense grants).

11. Grant Amount *

About the grantee

Grant recipients can only be individuals, not groups or incorporated entities.

The Collective Admin is expected to gather this information to minimize the burden on the grantee, and so that Collectives are enabled to interact with grantees and collect information about them in ways best suited to their grant program and their unique communities (e.g. in person, phone, email, an application process, etc).

12. Grantee Legal Name *

We need their real legal name for IRS reporting and our internal records. If they have privacy or identity concerns in relation to using their legal name publicly, specify a preferred name below.

13. Grantee preferred name

If different from above. As it is being processed through a transparent platform, this grant, and its associated Project and Expenses, will be public. If the grantee has specific concerns about their privacy or identity and does not wish to associate their legal name with this grant publicly, they may specify a preferred name here. This alternative name should match the name used on their Open Collective profile, in Update narratives, and when referring to them and the grant in public contexts.

14. Link to grantee's Open Collective profile

If the grantee has already registered on Open Collective, specify their profile here. If you intend to invite them to submit their first grant expense and they are not yet registered, leave this blank.

15. Grantee email *

16. Grantee phone number *

17. Grantee address *

18. What criteria were used to select this specific grantee? *

Why was this person specifically selected, considering that others may also meet the eligibility requirements? What specific characteristics, experiences, or qualifications does this individual have in relation to the criteria?

19. The grantee consents that their name and address, and required information about the grant, will be submitted to the IRS by OCF. *

As a 501(c)(3), OCF is obligated to report details of all grants. OCF will handle all IRS reporting –Collective Admins and grantees do not need to submit anything to the IRS directly.

Check all that apply.

Yes

20. I confirm that the grantee is not a disqualified person in relation to Open Collective Foundation or the grantmaking Collective. *

Disqualified persons include staff, directors, volunteers, or substantial funders of OCF, and family members and business partners of such persons, and all Collective volunteers, contributors (donors), employees, contractors, and their family members.

Check all that apply.

Yes

21. I and the grantee understand the Grant Agreement requirement *

Before distributing grant funds, both the grantee and the Collective Admin will be asked to sign a Grant Agreement based on the details submitted on this form and OCF's standard grant terms. OCF will reach out with this Grant Agreement once this grant proposal is approved.

Check all that apply.

Yes

22. I affirm that I will allocate all funds for this grant to the associated Project, and all Expenses will be submitted to that Project as a Grant Expense. *

Check all that apply.

Yes

Hardship grant

For the purposes of tax-free hardship grants, IRS regulations define a person in need as one "who lacks the necessities of life, involving physical, mental, or emotional well-being, as a result of poverty or temporary distress." Examples include a person who is financially impoverished as a result of low income and lack of financial resources, a person who temporarily lacks food or shelter and the means to provide for it, a victim of a natural disaster or civil disaster, and a person who is temporarily not self-sufficient as a result of a sudden and severe personal or family crisis, such as a crime of violence."

23. In what way does the grantee meet this definition of a person in need? *

24. How did you determine that the grantee is a person in need? *

For example, review of financials - tax returns, overdue bills, etc.

Next steps

Once this Grant Proposal has been approved by OCF, you and the recipient will receive a request to sign a Grant Agreement confirming the above information and the general terms under which OCF makes grants. Once all parties have signed this Grant Agreement, grant funds may be disbursed, via submitting expenses to the Grant Project budget.

Study grant

Study grants may only be given if the grantee is a candidate for a degree at an eligible educational institution. The degree program must give credit toward a bachelor's or higher degree, and the educational institution must be one whose primary function is the presentation of formal instruction, and must be accredited. Study grants may only be used for tuition or specifically required course-related expenses such as books or supplies. Grant funds may not be spent on room and board, travel, research, clerical help, or equipment and other expenses that aren't required for everyone enrolled in the course.

25. Which educational institution is the grantee attending? *

26. What degree will this grant support the grantee to pursue? *

Next steps

Once this Grant Proposal has been approved by OCF, you and the recipient will receive a request to sign a Grant Agreement confirming the above information and the general terms under which OCF makes grants. Once all parties have signed this Grant Agreement, grant funds may be disbursed, via submitting expenses to the Grant Project budget.

Award grant

The IRS has certain requirements for an award grant to be tax-free. These questions help ensure those requirements can be met.

27. Will this award be made primarily in recognition of past achievements of the grantee in religious, charitable, scientific, educational, artistic, literary, or civic fields? *

Check all that apply.

Yes

28. Was the grantee selected without any action on their part to enter the contest or proceedings? *

Check all that apply.

Yes

29. Will the grantee be required to render substantial future services as a condition to receiving the award? *

Check all that apply.

No

Next steps

Once this Grant Proposal has been approved by OCF, you and the recipient will receive a request to sign a Grant Agreement confirming the above information and the general terms under which OCF makes grants. Once all parties have signed this Grant Agreement, grant funds may be disbursed, via submitting expenses to the Grant Project budget.

This content is neither created nor endorsed by Google.

Google Forms