Sherwood Trust Grant Guidelines

Sherwood Trust's Vision
Everyone in the Walla Walla Valley has a sense of belonging and contributes to a thriving region. Sherwood Trust serves as a catalyst for building capacity, creating a cohesive, vibrant community.

Sherwood Trust's Core Values

Sherwood Trust Grant Programs

<table>
<thead>
<tr>
<th>Grant Type</th>
<th>Grant Amount</th>
<th>Application Process</th>
<th>Award Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Grants (Capital, Capacity, Community)</td>
<td>No minimum amount</td>
<td>Letter of Interest due Feb. 1 Application due March 8</td>
<td>Awarded in June</td>
</tr>
<tr>
<td>Impact Grants (Collaboration, First-Time Awards)</td>
<td>Up to $15,000</td>
<td>Letter of Interest due Sept. 13 Applications due Oct. 4</td>
<td>Awarded in November</td>
</tr>
<tr>
<td>Invitational</td>
<td>Varies</td>
<td>RFP-specific or by invitation</td>
<td>Rolling</td>
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Sherwood Trust has three grant programs. All our grant programs are guided by our Eligibility Requirements, Giving Principles and Core Values. Specifics for each grant program are detailed separately. For more information about Sherwood Trust grants, including past awards, visit www.sherwoodtrust.org.

Sherwood Trust Core and Impact grants are competitive – there are always more requests than can be funded. The following guidelines are applicable for all grant programs unless otherwise approved for submission. Applicants are strongly encouraged to discuss their grant proposal with Sherwood Trust in advance of submitting a request to ensure the project meets Sherwood Trust’s guidelines. Call 509-529-2791 or email brian@sherwoodtrust.org.
Grant Eligibility Requirements

- Benefit registered tax-exempt organizations under Section 501(c)(3) of the Internal Revenue Code or a public agency. Sherwood Trust accepts applications from fiscal sponsors that become the grantee and receive approved funding.
- Be submitted by or with an organization serving the Walla Walla Valley, defined as extending from Dayton, Washington to Milton-Freewater, Oregon.
- Charitable activities should be consistent with Sherwood Trust's vision and values.
- For Core grants, please allow two intervening years from receipt of Core grant funds before applying for another Core Grant.

Our Giving Principles

- Private philanthropy is a strategic activity, not a charity. It demands the seriousness of a long-term investment and requires stringent underwriting to ensure grants support achievable, measurable results.
- An organization's operational model and its execution is critical to achieving its mission. Sherwood Trust grants favor effective organizations that demonstrate strong leadership, competent management, strategic innovation and a record of achieving tangible results.
- Sherwood Trust grant programs are for organizations whose work directly supports our vision that everyone here has a sense of belonging and can contribute to our thriving region. We seek transformative investments that support local people working together toward stronger, more equitable communities.
- Sherwood Trust favors applicants with evidence of multiple donor commitments so that Sherwood Trust is not funding the majority of the request. Sherwood Trust prefers to fund final grant dollars.

Core Values

- Collaboration – support for collaboration between organizations on a common project, particularly those with broad regional benefits that address a community need
- Empathy – support for initiatives that promote mutual understanding, learning and respectful community engagement
- Equity – support for initiatives that promote and strengthen inclusive, representative engagement in our region to build a more cohesive community, particularly those that address inequities for underserved population.
- Excellence – support for nonprofits with a track record of sound operational management and development of internal capacities that enhance an organization’s resiliency
- Integrity – support for operations that demonstrate transparency and unity in the fulfillment of their mission
- Sustainability – support for strong, resilient organizations with a track record of good governance and accomplishment

Additional Considerations

- Grant proposals seeking funds for scholarships, door prizes, raffles or to benefit an individual will not be accepted.
Sherwood Trust Core Grant
Guidelines and Application Process

Sherwood Trust Core Grants are traditionally the majority of our funding in a given year. These proposals seek to invest in an organization’s most important priority, may be multi-year commitments, and generally fall within three major categories:

- Capacity grants for nonprofit organizations can include expanding service or operations, or funding for specific innovations or projects that support resiliency and strengthen an organization’s ability to fulfill its ongoing mission
- Community grants for qualifying neighborhood and community-based projects that generally include a public agency or community organization partners
- Capital grants for traditional ‘brick and mortar’ projects

Core grant applications should be informed by Sherwood Trust vision, values and giving principles.

*Please allow two intervening years from receipt of funds before applying for another Core Grant. For example, if you received Core grant funds in 2022, you are eligible to apply again in 2025.*

2023 Core Grant Application Timeline and Requirements

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
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<tbody>
<tr>
<td>Feb. 1</td>
<td>Letter of Interest (LOI) final deadline. Organizations will not have access to the rest of the application until LOI has been reviewed and approved by Sherwood Trust. We strongly encourage organizations to contact Sherwood Trust to discuss their proposal in advance.</td>
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<tr>
<td>Feb. 22</td>
<td>Organizations will be notified if LOI is approved for application process.</td>
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<tr>
<td>March 8</td>
<td>Deadline for Core Grant Application. Early submissions are welcome.</td>
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<tr>
<td>March 22</td>
<td>Sherwood Trust will notify applicants if their application moves forward. Request for a site visit and/or supporting materials will be made as applicable.</td>
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<tr>
<td>March/April</td>
<td>Site visits and due diligence conducted as appropriate.</td>
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<tr>
<td>June</td>
<td>Core Grant recipients announced.</td>
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Core Grant online application includes the following.

- Detailed project proposal with budget, including other income sources
- Key goals and measurements to be achieved
- Organization overview, including current organizational staffing
- Financial overview, including current annual budget and three years of past financial statements
Sherwood Trust Impact Grant Guidelines and Application Process

Sherwood Trust Impact Grants are designed to support collaborative projects or initiatives that advance Sherwood Trust’s mission of everyone in the Walla Walla Valley having a sense of belonging and contributing to a thriving region.

Impact grant applications should be informed by Sherwood Trust vision, values and giving principles.

*Impact awards are limited at $15,000 or less, for organizations that have not received Sherwood Trust funding in the last 5 years (since 2018).*

Impact Grant Application Timeline and Requirements

- **Sept. 13** Letter of Interest (LOI) final deadline. Organizations will not have access to the rest of the application until LOI has been reviewed and approved by Sherwood Trust. We strongly encourage organizations to contact Sherwood Trust to discuss their proposal in advance.

- **Sept. 20** Organizations will be notified if LOI is approved for application process.

- **Oct. 4** Impact Grant application deadline.

- **November** Fall Impact Grant recipients announced.

**Impact Grant applications include the following:**
- Detailed project proposal with budget, including other income sources
- Key goals and measurements to be achieved
- Organization overview, including current organizational staffing
- Financial overview, including current annual budget
Sherwood Trust Invitational Grants

In addition to Sherwood Trust’s traditional grant programs, we may also seek grant proposals outside of the Core and Impact grant programs. Specific Invitational Grants will be defined individually via Request for Proposals and may occur outside Sherwood Trust’s traditional grant timeline.

All invitational grant applications should be informed by Sherwood Trust eligibility requirements, giving principles and investment strategies as noted for all Sherwood Trust grant programs. Individual awards will be determined based on qualified applications received. Respective details and Request for Proposals will be issued as indicated.

Invitational grants include Sherwood Trust Legacy Awards which are granted annually to select organizations that Donald and Virginia Sherwood funded in their lifetimes or specified in their will.