

# Reed and Carolee Walker Fund Grant Guidelines

## About the Fund

The Reed and Carolee Walker Fund was established at The Oregon Community Foundation (OCF) in 2003 by a generous bequest from Ashland residents Reed and Carolee Walker. The Fund is a permanent endowment, with earnings to be used for general charitable purposes in Jackson County, Oregon. The Fund distributes approximately \$2 million in grants annually.

## Focus of the Fund

It was the desire of the donors that the Walker Fund be used to help low-income people, particularly children. Reed Walker's will said in part: "Preference shall be given to organizations that provide food, shelter, emergency needs services and other services to the poor and needy in Jackson County and that provide an opportunity for those living in poverty to become more self-sufficient ... In addition, preference shall be given to organizations and elementary schools that provide health, clothing, nutrition services, emergency needs, enhancement programs and field trips for children living in poverty."

## Funding Priorities (6)

After assessing community needs and considering best practices, along with the donors' intent, OCF established the following funding priorities for The Walker Fund:

- Improving the Health and Well-being of Children in Poverty by providing:
  1. Dental healthcare for children
  2. Mental health services for children
  3. Substance abuse treatment for pregnant women and/or parents with young children
- Meeting Short-Term Needs of People in Poverty by providing:
  4. Food, clothing, shelter and other emergency assistance for individuals or families
  5. Enrichment programs for children in need
- Although less likely to be funded, projects will be considered if they:
  6. Otherwise address the focus of the fund

## Program Details

- In order to apply an organization must have 501(c)(3) status as a public charity (not a private foundation), be a public entity, or have a qualified fiscal sponsor.
- Grants generally range in size from \$5,000 to \$150,000 and are in proportion to the size and capacity of the applicant organization. We encourage organizations to think big and think small.
- Grants are given for projects or building organizational capacity, but not for capital projects, deficit funding, replacement of government funding, or religious activities.
- There is one funding cycle per year for the Reed and Carolee Walker Fund. Online applications are accepted through MyOCF, our online application system. Only projects serving **Jackson County** are eligible for Walker Funds. Applications open on December 10th and are accepted till 5 p.m. on February 10th each year. Grant decisions are made in early May.
- Generally, one application per organization per year is accepted. Large organizations with distinctly different program areas may submit more than one application per year; however, we encourage multiple requests to be combined into a single application when possible. If you have questions about multiple applications, please contact Amy Cuddy at [acuddy@oregoncf.org](mailto:acuddy@oregoncf.org).

- Applicants may apply for support for “new projects” or “previously funded projects” (i.e. projects previously funded by The Walker Fund). There is no limit to the number of times you can apply for the same project in the “previously funded” category.
- Grantee reporting: progress reports are embedded in the Walker Fund application due February 10 (approximately nine months after the grant award). If you are not submitting an application for a “previously funded project,” in lieu of a progress report please fill out a final report (the report form is on the OCF web site, and the report is due Aug 1st). Final reports are not required if you are reapplying for the same project. Grant award letters contain specific information about reporting requirements.

### **Guiding Principles**

- We believe that creative and sustainable solutions come from people who work in partnership to address common needs and aspirations.
- We give high priority to investments that create positive, substantive change and attempt to resolve problems at their source.
- We recognize and respect Oregon's diverse regions and populations, and we seek to advance equity, diversity and inclusion through our programs.

### **Competitiveness**

- Organizational Qualities that make an application competitive include:
  1. Mission is a close fit with Walker Fund funding priorities
  2. Organization and/or leadership has a track record of effective work
- Project Qualities that make an application competitive include:
  1. Project both aligns with organization’s mission and meets a community need
  2. Good planning is evident in the project timetable, goals, staffing and budget
  3. Plans for evaluating impact are clear, appropriate and achievable
  4. Any proposed collaboration with other organizations has been formalized
  5. Project shows a creative use of community resources applied to solving a problem
  6. Project is “best practices” and/or has the potential to be catalytic
- OCF Non-Discrimination Policy: OCF does not discriminate on the basis of race, ethnicity, color, religion, gender identity of expression, sexual orientation, disabilities, age, status as a veteran, national origin or any other protected class. Applicants must hold similar standards.

### **More information**

- More information is available on the OCF web site [www.oregoncf.org](http://www.oregoncf.org)
- For questions about the Walker Fund, you may also contact Amy Cuddy, 541-773-8987, [acuddy@oregoncf.org](mailto:acuddy@oregoncf.org). For questions about the MyOCF online application system, please contact Carlee Smith, 503-227-6846, [csmith@oregoncf.org](mailto:csmith@oregoncf.org).