

Affiliate Grantmaking Expectations

Setting clear community grantmaking expectations ensures that the funding practices of the Community Foundation of the Ozarks remain consistent, transparent, and aligned to enhance the quality of life in our region with organizational purpose. Establishing expectations helps us steward resources responsibly, strengthen trust with partners, and support equitable, community-driven impact across the region.

Procedural Changes for FY27

- To align with current discretionary grantmaking practices, agencies receiving affiliate grants must sign a grant agreement prior to the funds being released.
- The CFO will no longer require final reports for affiliate and discretionary grants under \$1,000.00. This adjustment reduces administrative burden for grantees and helps CFO implement trust-based philanthropy.
- Affiliate boards that wish to support special projects and initiatives outside of hosting a grant round may communicate their grant request through this form: cfozarks.org/affiliate-grant-requests

Community Grantmaking

According to the Memorandum of Agreement between the CFO and its affiliates, each affiliate of the CFO is responsible for evaluating proposals for discretionary grants from the component funds of the affiliate and recommending to the CFO Board of Directors the grants to be funded.

In alignment with the [CFO's inactive fund policy](#) (available on cfozarks.org), affiliates must issue at least one grant or payment from each fund under their umbrella, including grantmaking and administrative funds, every three years. This policy was put into place to:

- understand and support the charitable goals of donors;
- ensure that charitable dollars are being used to benefit communities through intentional grantmaking; and
- help address policymakers' concerns about funds that do not make periodic distributions.

There are three methods by which grants may be awarded:

- 1) **Annual grantmaking program:** An affiliate board may wish to run annual grantmaking programs through which eligible agencies may submit proposals through an established application process, and the affiliate grant committee makes funding recommendations. As of Fiscal Year 2028, all grant rounds will be hosted online through CFO's grant portal only. To set up your affiliate's annual grantmaking application through the CFO's online grant portal, complete this form: cfozarks.org/affiliate-online-grant

- 2) **Affiliate recommended grants with no grant round:** At times, an affiliate may wish to support special and/or emergent community projects that do not follow a typical grantmaking process. In that case, please use this form to request a grant: cfozarks.org/affiliate-grant-requests
- 3) **Affiliate support for long-term projects:** An affiliate board may wish to refrain from awarding grants for a year or two to build up funds to support long-term community projects. If that's the case, the project and funding plan can be described using this form: cfozarks.org/affiliate-project-support

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