



ANNUAL FOUNDATION CYCLE

FIRST QUARTER:

Review of the Grantees Prior Year Outcomes
Calendar and Focus for new year
Communications/Website review
Financial overview of year
990 completion/Review of board policies
Review Board expectations and potentially evaluate
Review performance of staff/consultants

SECOND QUARTER:

Assessment of Strategic Direction and progress
Grantee assessment of foundation
Review of Letters of Interest
Invitation for Grant Applicants

THIRD QUARTER

Convenings with other non-profits and funders
Technical Assistance to Grant Applicants
Potential site visits
Receipt of Grant Applications

FOURTH QUARTER

Annual Meeting to assess grantees
Grant Award Determination
Budget projections for following year
Grants disbursed
990 Review
Notice to last year's grantees on Annual Report