

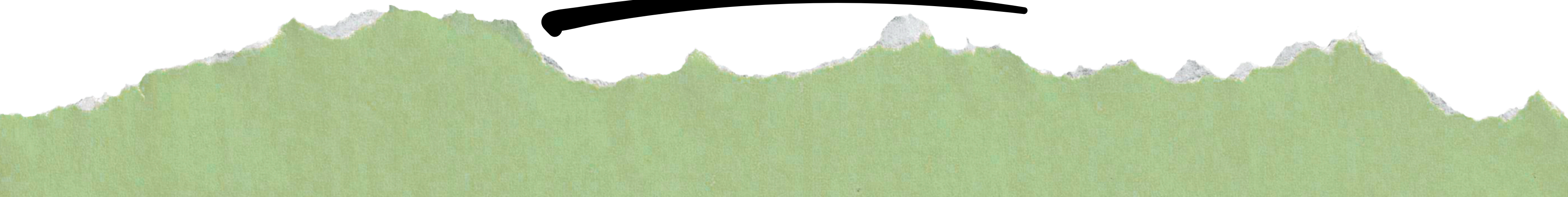
El Dorado Community  
Foundation



**amplify** **good**

# *Grant Evaluations*

*EDCF Best Practices & Policy Updates*





# Agenda

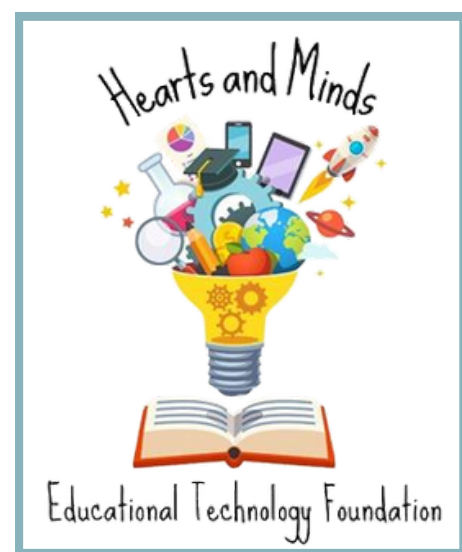
**01** Before you Evaluate-What we Do

**02** Timeline & Application Pieces

**03** Best Practices

- Insider Benefit Prevention Policy
- Confidentiality Agreements
- Personal Bias

**04** Cares, Concerns, Compliments...



*Before you Evaluate...*

*Here is  
What  
We Do*



*Compliance Check*

Review each organization for compliance with:

- IRS (filed at least once in past 3 years),
- CA SOS (SOI & FTB),
- CA DOJ (Current)



*Specific Grant Requirements*

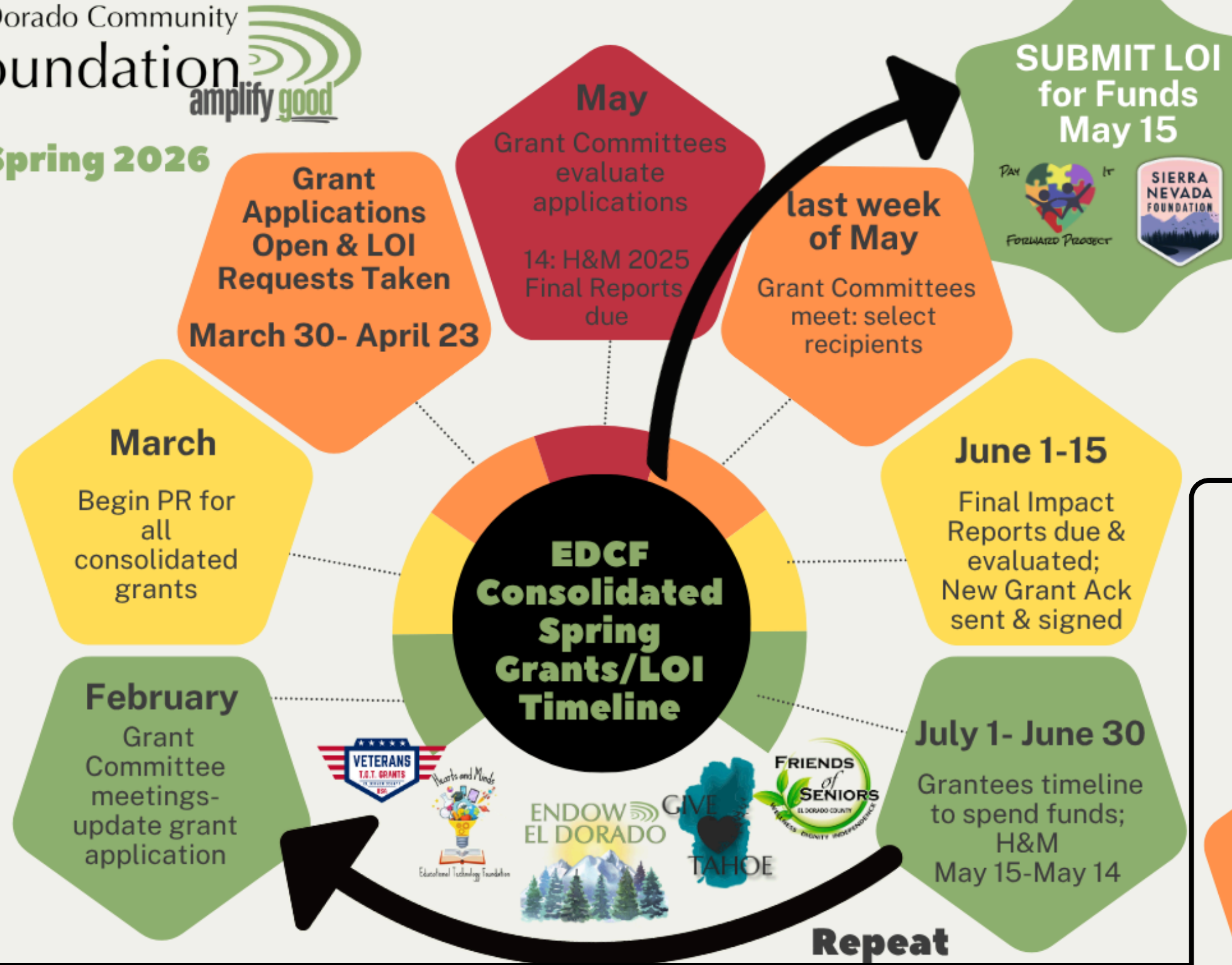
Basic check of a grant committee's requirements like geography, status, age- whatever "you" want us to check



*Clarify with Grant Contacts*

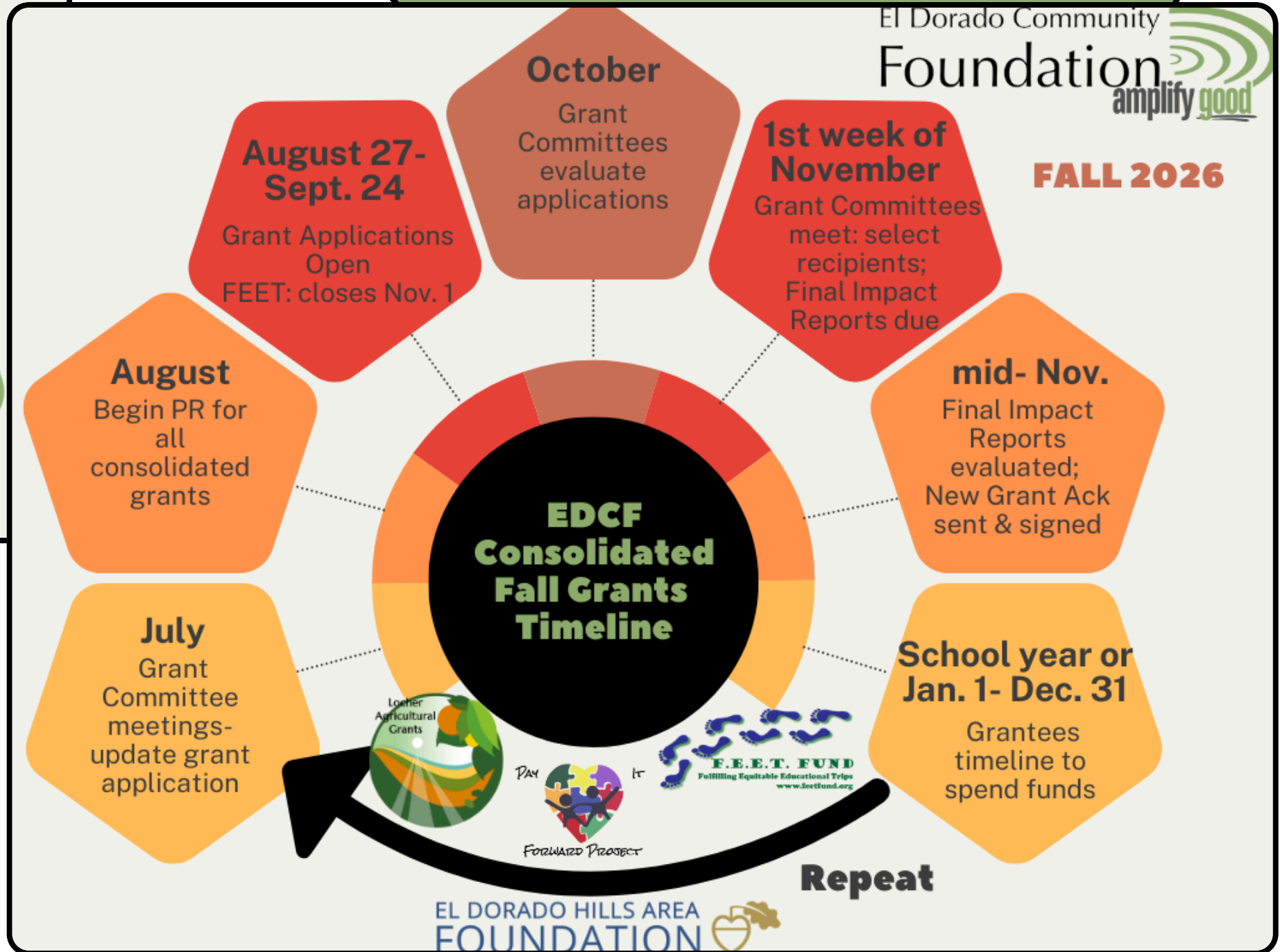
Reach out and ask for clarification or more info of applicants if compliance issues are simple or just vague.

**Spring 2026**



# Timelines for 2026

**FALL 2026**



*Women's Fund apps open on their own timelines:  
 WFED: Jan. 5-29  
 TWCF: Feb 12-March 10*

# *Application Rubric*

Grants are **restricted** funds that are awarded to organizations that reflect a comprehensive program in their application that has clear descriptions, measurable objectives, and realistic timelines and budgets. The Foundation is responsible to its donors to ensure that grant dollars are spent as explicitly explained in the original application (which we do through final impact reports.)

***QUALITY***

***BUDGET***

***IMPACT***

***NEED***

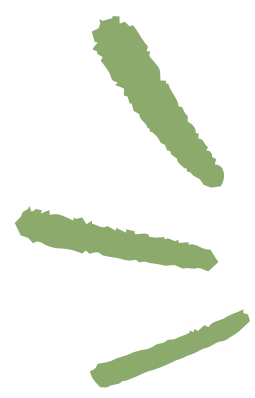
## ***Scoring:***

Consider a grading system...

70%-100% is passing

59% and below is failing

0 means nothing is there



# *Best Practices*

Best practices are “best” when they remain living documents...and over the last 2 years, EDCF has worked hard to update policies & practices for transparency, efficiency, and greater philanthropy as we navigate a challenging and dynamic landscape to transform lives and impact lasting change.

1st

*Conflict of Interest*  
*Policy*

2nd

*Confidentiality*  
*Agreements*

3rd

*Personal Bias*

El Dorado Community  
Foundation


 **amplify good**

# Conflict of Interest Policy

- *The Foundation's Conflict of Interest Policy does apply to you. This policy simply asks for disclosure of any affiliations with charitable or business organizations, vendors, or other interests that might create a potential conflict. If such a conflict arises, you are asked to recuse yourself from both the discussion and the vote on the specific application or funding request connected to your affiliation.*
- *This policy sets the minimum standard for transparency and accountability. Your committee is welcome to adopt additional measures if you feel they are helpful/necessary, but none less than this level of disclosure.*

# Confidentiality Agreements

**All information concerning donors, grantees, scholarship recipients and applicants, staff, volunteers, financial data, and business records of El Dorado Community Foundation and all affiliate funds is confidential and should not be disclosed or discussed with anyone without permission or authorization from the Foundation. Care shall also be taken to ensure that unauthorized individuals do not overhear any discussion of confidential information and that documents containing confidential information are not left open or inadvertently shared. No information may be released without appropriate authorization.**



# *Y* Personal Bias

As a grant evaluator, consider the application in front of you...not your previous experiences or local gossip. Organizations with applications have been vetted for compliance by EDCF staff, and evaluator personal bias is neither productive or ethical.

*Leave it at the door...*



*If personal bias is unavoidable, please reach out to us so we can help work on a transparent & fair solution for the organization and our grants committee.*

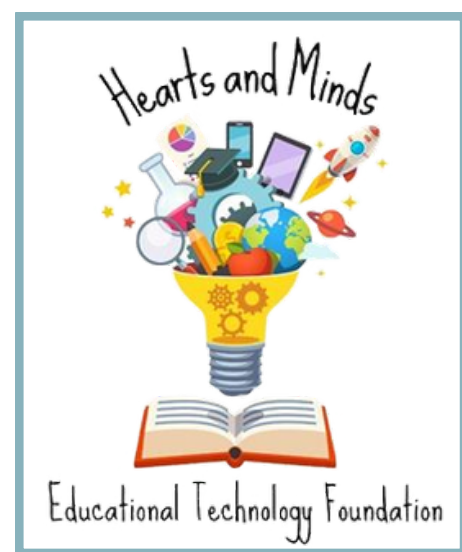


# Questions?

**Kathy Haven**  
Director of Grants, Programs, & Impact  
[kathy@eldoradocf.org](mailto:kathy@eldoradocf.org)



El Dorado Community Foundation  
**amplify good**



*Thank you for your integral service in the grant making process that allows us to support the amazing nonprofits in our communities!*