



Multi-Year Grant Request Primer

The Maclellan Foundation, Inc. extends invitations to apply for multi-year grants at the discretion of the Strategy Director or Program Officer. An invitation to apply does not constitute a commitment but allows you to present your project for consideration. You will work closely with your Strategy Director/Program Officer as you develop the proposal before submitting it in the portal.

Here are some specific parameters:

- Grants will be for a maximum of 3 years, with a maximum award of \$300,000 the first year.
 - The funding amount should trend downward during the multi-year commitment.
 - An award implies a commitment to fund your project for multiple years, given satisfactory progress as indicated on yearly reports and in follow-up conversations with the Strategy Director/Program Officer.
 - Renewals for subsequent years are contingent upon submitting an abbreviated renewal application along with updated attachments.
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APPLICATION PROCESS FOR YEAR ONE

The multi-year application is very similar to our traditional, single-year grant request application, with a few key differences. Since you will use the same application in the grants portal, pay close attention to the additional requirements and differences. Please start by visiting <https://maclellan.net/multi-year> for general information related to the multi-year application process as well as links to helpful templates.

KEY DIFFERENCES IN APPLICATION

- Executive Summary

In your Executive Summary, please provide a complete picture of how you will use the funds over the course of all the years, giving detail where needed about how the project breaks down year by year. Please also describe how you will measure your progress and whether you will be measuring your progress against an end goal, or against yearly goalposts.

- Objectives

In the Objectives tab, each year you will be providing **up to five** goals for how you will measure your project's progress. You will discuss this process with your Strategy Director/Program Officer. They will help you determine how to best measure your objectives for reporting purposes.

- **Yearly goalposts:** Your Objectives will be measured on a yearly basis.
- **End goals:** You are measuring progress against an end goal that you hope to achieve at the end of multiple years.



Please specify if your objective covers more than one year, otherwise we will assume they are one-year objectives. An objectives worksheet can be found [here](#).

- Attachments

Your **Project Budget** must provide details about how your funds will be used over the course of the entire grant (in USD). Please give us details about how you will use the grant each year, as well as how you anticipate allocating Maclellan funds.

- Your Strategy Director or Program Officer may require you to submit a report on your actual expenditures on your yearly update reports.
- In subsequent year renewals, you may work with your Strategy Director or Program Officer to discuss amendments to future years' budgets as needed., however these amendments cannot exceed the total approval amount.
- We have provided a sample 3-year budget template that you can use [here](#).

DECISION

After you submit your request, we will contact you with any questions. Once our Grants Committee reviews your request and arrives at a determination, we will inform you of their decision. If awarded a grant, we will send you a Grant Agreement with the legal stipulations. We will also discuss with you what type of MOU is needed if your Strategy Director determines an MOU is necessary. A multi-year grant decision will include the total amount committed over all three years, as well as a proposed funding breakdown by year. After an updated report and renewal request is made in our grants portal, subsequent year renewals will be made unless there is a significant failure to execute on the agreed upon terms of the grant.

PROGRESS UPDATES

We ask that you remain in close contact with us throughout the project to inform us of any major changes or challenges along the way. We prefer to know about changes to the plan early, rather than solely upon receipt of the post-grant report.

POST-GRANT REPORT

Two months before your renewal is due, you will submit your post-grant report. Because this report will be a progress report designed to update us, rather than a final report after project completion, you will submit this report before the first year is complete, even if your objectives were for 12 months. The purpose of the report is not punitive but to provide us with an update on progress and obstacles, to facilitate further conversation. You will provide updates on your grantee objectives, as well as answer other narrative questions. When you submit this report, your Strategy Director or Program Officer may also request a copy of your Project Budget actuals.

The post-grant worksheet can be found [here](#). Mark your report as "Interim" when given the option between "Interim" and "Final."



APPLICATION PROCESS FOR SUBSEQUENT YEARS

After you submit your post-grant report, your Strategy Director/Program Officer will review your report and reach out to you with any questions or for a verbal update. If they are ready to consider funding for the subsequent year, their Program Associate will reach out to you with instructions approximately two months before your renewal date, which is one year after the prior year's award. The renewal process is expedited, but we still require some updates. Our goal (if everything is going according to previously established plans) is to complete the renewal process in a timely manner so that payment can be received a year after the prior year's payment. **Here is an overview below, and more details will be provided later.**

RENEWAL APPLICATION

- The Program Associate (MacLellan staff member who works with you closely on the application process) will create a **copy of your request from the previous year**, transferring over most of the data EXCEPT your grantee objectives and attachments.
- You will then log in and update the following:
 - **Executive Summary** – Update your summary as needed.
 - **Grantee Objectives** – You will need to provide up to 5 new objectives. You may reuse previous objectives if they are still active, or you may provide new objectives. As before, these objectives can either be written as one-year goalposts, or as end goals to span the entirety of the project. Please specify if your objectives are for more than one year.
 - **Amount Requested** – Please enter the amount agreed upon when the grant was initially awarded for either Year 2 or Year 3, depending on where you are in the grant cycle.
 - **Attachments** – Most attachments are required by our system; however, we do not need all the new attachments. The Program Associate will inform you which attachments are needed.

DECISION

The Strategy Director or Program Officer will review the completed renewal request and will reach out to you with any questions. They will then award the grant and the foundation will issue payment within a few weeks.

POST-GRANT REPORT

If this is not your final year of funding for this project, please see the Post-Grant Reporting section above for instructions.

If this IS your final year of funding for this project, you will submit your final post-grant report approximately 12 months after your final award date. You will provide updates on your grantee objectives, as well as answer other narrative questions. When you submit this report, your Strategy Director or Program Officer may also request a copy of your Project Budget actuals.

The post-grant worksheet can be found [here](#). Mark your report as "Final" when given the option between "Interim" and "Final."