



MONTEREY
PENINSULA
FOUNDATION

APPLICATION CYCLE CHANGE FAQ

Why is Monterey Peninsula Foundation changing its application cycles?

The Foundation made these changes to better incorporate the golf tournaments we host (AT&T Pebble Beach Pro-Am and PURE Insurance Championship, Impacting The First Tee) into the grantmaking schedule.

What does this mean for the application process?

The three-grant cycle change went into effect **July 1, 2019**. The new application and reporting deadlines are:

- **Summer Cycle**
 - April 1 application deadline for July Review
 - Reports due March 1
- **Fall Cycle**
 - August 1 application deadline for November Review
 - Reports due July 1
- **Winter Cycle**
 - December 1 application deadline for March Review
 - Reports due November 1

ALL application and report deadlines remain consistent going forward. For more information on home cycle selection, please refer to page 3 (MPF Home Cycle Selection Information).

What does this mean for my upcoming report?

If your report is due **on/before July 1, 2019**, the deadline will remain the same. For example, if your report is due 5/1/2019, your report is still due on 5/1/2019.

If your report is due **after July 1, 2019**, please refer to the Online Portal for your report deadline.

Foundation guidelines remain the same. Final reports **must** be completed before the next grant application can be considered. For questions concerning final and mid-term report deadlines, please email hk@mpfca.org.

NOTE: You must strictly adhere to your report deadlines. Submitting your report late may result in the denial of your new application or cancellation of your next multi-award payment(s).

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Will we need to stay within a given cycle for our future applications?

Yes. We ask applicants and grantees to select best timeframe for their needs. Once a home cycle is selected, we require grantees and applicants to remain within that cycle for all future applications. We believe the simplified deadlines will help grantees and applicants meet reporting and application deadlines. By making the selection of a home cycle that matches fiscal needs, applicants and grantees are more likely to have required documents ready to share with funders.

Please complete the following questionnaire to select the home cycle: https://MPF.formstack.com/forms/grant_cycle.

If our situation changes, can we discuss the need to change cycles?

We view the first year of this change as a time of learning. We are always happy to discuss specific situations.

We ask that agencies take the time to think through their selection of a home cycle to ensure it is a good fit. Pertinent questions for grantees:

- When is the agency's fiscal year?
- What financial reports are required? When will they be produced? Are the appropriate fiscal year budgets drafted by the application deadline?
- Is there adequate funding to accommodate a timing change? Does cashflow impact the home cycle selection?
- What is the fiscal impact of when funds are received and when they are spent? Can we spend the grant funds within the required reporting period?

NOTE: You must strictly adhere to your new application and report deadlines. Submitting your application or report late may result in the denial of your new application and ineligibility to reapply for one year.

Is there anything else changing this year that we should be aware of?

As of July 1, 2019, we eliminated the Year-to-Date financial requirement. Instead, applicants are required to submit the organization's most recent 990.

Please review the appropriate, updated requirement checklists to prepare for your application:

- [Public School \(K-12\) Application Requirement Checklist](#)
- [General Grant Application Requirement Checklist](#)

We hope to implement minor enhancements to improve user experience in the application and reporting portal.

No significant changes are planned for the near future.

Who can I contact about the home cycle shift?

Call Foundation offices at 831.649.1533 and ask for the Philanthropy Department. You can also email grants@mpfca.org.

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MPF Home Cycle Selection Information

While there are many things to consider, fiscal year timing is an important one. The closer to the start of your fiscal year, the more likely you are to have budgets and materials appropriate to submission. The notes below can help you determine what is right for your organization. When you are ready to submit your choice, please complete the form at [MPF.formstack.com/forms/grant_cycle](https://mpf.formstack.com/forms/grant_cycle).

Summer Cycle

April 1 deadline for July Review

REPORTS DUE MARCH 1

- Grantees applying in April for the June review likely to stay within this cycle;
- May be the best cycle for applicants that had **applied in July for September review.**
- Grantees with fiscal years ending **6/30** may wish to consider this as their home cycle;

Fall Cycle

August 1 deadline for November Review

REPORTS DUE JULY 1

- Grantees applying in July for September review likely to stay within this cycle;
- May be best cycle for applicants that had **applied in October for December review;**
- Grantees with fiscal years ending between **6/30 - 11/30** may wish to consider this as their home cycle;

Winter Cycle

December 1 deadline for March Review

REPORTS DUE NOVEMBER 1

- Grantees reviewed in December for March review likely to stay within this cycle;
- May be best cycle for applicants that had **applied in October for December review or January for March review.**
- Grantees with fiscal years ending **12/31** may wish to consider this as their home cycle;

ALL application and report deadlines remain consistent going forward. Determine a Home Cycle that will work for your organization.

Monterey Peninsula Foundation will expect applicants to stay with the home cycle selected, providing a consistent schedule for each grantee and facilitating greater forecasting abilities for the Foundation to meet needs.