cutting-edge groups that are underfunded,” says Susanna. “Some of them have never written a proposal before we contacted them. We give them as much help as they need to produce a good proposal, and they can always call us if they have questions. We want them to succeed, and to do so they have to know how to write proposals.”

Most foundations still require grantseekers to deliver their proposals by mail. With the widespread use of the Internet, today some foundations accept application forms via e-mail. In fact, The Sandy River Charitable Foundation encourages it. “We try to be flexible,” says Nathanael Berry. “We also accept information about an organization’s financials that they’ve posted on public websites — either on their own or on sites such as www.guidestar.org.” The Sandy River Charitable Foundation is willing to go a step further to accommodate grantseekers. It accepts proposals applicants have written to other foundations as long as grantseekers rewrite sections to address Sandy River’s interests.

**Screening Proposals**

However you initiate the grantmaking process — with a letter of inquiry, solicited proposals, or unsolicited proposals — you will receive more requests than you can fund. To ensure that proposals get a fair hearing, it is recommended that at least two people — trustees or staff — read and discuss the proposals. Different perspectives on a project or issue can mean the difference between a proposal being rejected or accepted for further consideration.

Your initial screening procedure might involve these elements:

- Develop a checklist of criteria for screening proposals. The checklist can be used in the initial screening process and again in the formal review process to help board members focus their thoughts.
- After reading each proposal, put it in one of three stacks: interesting, questionable, outside guidelines.
- To learn more about the “questionable” proposals, consider calling colleagues or your local community foundation. They may have information about the organizations and programs that would help you decide whether to consider or reject the proposals.

First funding cycle. Let’s say that you can fund 10 proposals. Go through stack #1 again and select the 15 strongest candidates, anticipating that at least five will not make the final cut.

- Notify applicants of the status of their proposals promptly. Nonprofit organizations put their hard work and hopes into each proposal. The sooner they hear from you, the better they can plan their fundraising efforts.

More and more family trustees are recognizing the advantages of having a mentor to guide them through their first year of grantmaking. Some are most comfortable with an informal mentor relationship: meeting or talking periodically with someone whose ideas, values, and achievements they admire. Others prefer a formal relationship, such as hiring a consultant to act

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**Sample Postcard or Form Letter**

**To those organizations whose proposals you will consider:** “Thank you for sending us your proposal for ______. We are interested in it and have placed it on our docket for review by the board on ______. We will contact you if we need additional information ______ or to arrange a site visit.”

**To organizations you have screened out:** “Thank you for sending your proposal. Because it does not fall within our guidelines or current funding priorities, we regret that we cannot consider your proposal. We wish you luck in finding other funding.”