



NATIONAL CENTER FOR  
FAMILY PHILANTHROPY

## Family Giving Online Knowledge Center Board Activities and Training Procedures

**TITLE:** Screening Process for Incoming Grant Proposals

**SOURCE:** Emily Hall Tremain Foundation

[For more information, please go to: <http://www.tremainefoundation.org/>]

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### SCREENING PROCESS FOR INCOMING GRANT PROPOSALS (EMILY HALL TREMAINE FOUNDATION)

#### Program Inquiry Screening and Disposition

These procedures are followed for the initial screening and disposition of program inquiries and solicited and unsolicited grant concepts.

**Screening.** Upon receipt, inquiries and initial concepts are entered into the Foundation Management System (FMS). All inquiries are acknowledged within two weeks with a notecard sent to the organization or individual. They are screened by program staff within one month and a response is sent no later than two months from the time of receipt.

In accordance with Foundation policy, the following kinds of initiatives do not survive an initial screen except in very unusual circumstance:

- Programs outside the focus areas
- Construction projects
- Academic research programs
- Religious based programs
- International programs
- Grants to individuals

Other inquiries are reviewed for:

- A strong apparent match with a focus area strategy
- Apparently feasible program goals

- Apparently innovative approach
- Apparently significant potential impact

In addition to staff screening, any inquiry or concept advocated by a Board member is presented to the appropriate program implementation committee for review against standards, focus area guidelines and strategies. Also, all Board members are alerted to any organization from their home region that applies for a Foundation grant.

**Disposition.** If the inquiry or concept passes these screens, program staff:

- Contacts the organization for further information and follows the next steps in grant development

When an inquiry or concepts fails to pass these screens, the program staff:

- Enters the denial and denial reason in FMS
- Sends a letter including information about current Foundation grant-making priorities, the reason(s) for denial, and (where applicable) whether there may be a possibility of Foundation funding at a later date.