

Sifting Through Requests for Funding... How Do You Decide?

by Robin Platts

- (a) Does this agency and the request correspond with the foundation's mission statement and grant guidelines?**
- (b) Is this a priority (the service, the population served, the neighborhood, etc...) for the foundation?**
- (c) What is the purpose of the request?**
 - 1. To serve more people?
 - 2. To stabilize and continue to serve the same numbers?
 - 3. For internal capacity building?
 - 4. To address an unmet need?
- (d) How much is being requested?**
 - 1. How will the money be used—specifically?
 - 2. What portion of the program or overall budget does the request represent?
 - 3. Is the budget for the project reasonable compared to other program expenses?
- (e) How does the request fit with the organization's mission?**
 - 1. Are there signs of mission drift?
 - 2. Does the request support and reinforce the agency's mission?
 - 3. Is there infrastructure in place (technology, business/development plans, staff/volunteers) to adequately design and implement the program? Reality check.
- (f) Is the request in response to a crisis/emergency or is it an innovative method to solving a problem?**
- (g) Who else, in geographic proximity, provides the same or a similar service?**
 - 1. How is the agency the same/different from other agencies providing a similar service or serving a comparable population?
- (h) Is there evidence of collaboration with other agencies?**
 - 1. If so, in what way and how does it affect services/programs?
- (i) What are other funding sources for the project?**
 - 1. Public sector including bond funds
 - 2. Foundations/corporations/individuals
 - 3. Fee for service
 - 4. Fundraising/special events
 - 5. Annual giving

- (j) How many internal dollars are being committed and from where?**
1. How does this re-allocation affect other programs and services?
- (k) Who else is being approached for funding?**
1. What is Plan B should the agency not receive foundation funding?
- (l) How was this request determined to be a priority?**
1. Needs assessment
 2. Client surveys- to what extent have consumers been involved with the process (with people not to people)
 3. Board decision
 4. Is this the first priority or are there others? Describe
 5. Other
- (m) Do staff and volunteer leadership have the necessary qualifications, expertise and experience to undertake and implement the program/campaign?**
1. This is where a site visit is invaluable
 2. Capital campaigns, endowment, program what is the level of fundraising sophistication?
 3. Managing expectations
- (n) What is the track record of the agency**
1. With past funding from the foundation (post grant reports)
 2. With other funders or professionals in the agency's field
 3. Organizational performance-is management financed but not the program?
- (o) Evaluation, success and quality**
1. Are these mentioned?
 2. How will these items be measured?
 3. What can the foundation do (money, technical assistance) to help ensure the organization's success?
 4. How can we be better partners in the endeavor?
- (p) How will the foundation's participation in this project make a difference to the agency?**
1. Seed money
 2. Ability to leverage money and use name recognition
 3. Last dollar funding to complete the project
 4. Bridge funding
 5. To meet a match or challenge grant

(q) How will the program/building be supported in the future?

1. “We will seek other grants” is not an adequate answer
2. Are there benchmarks for various stages of the project?
3. Is there a tangible plan? Ask to see it.

(r) Documentation

1. IRS Determination Letter
2. Audited Financial Statement or Form 990PF
3. Current budget and previous year’s budget to actual
4. Annual Report
5. Board list
6. Other