Foundation Self-Assessment

Asking and answering powerful questions about your organization



Philanthropy Southwest Fall 2016

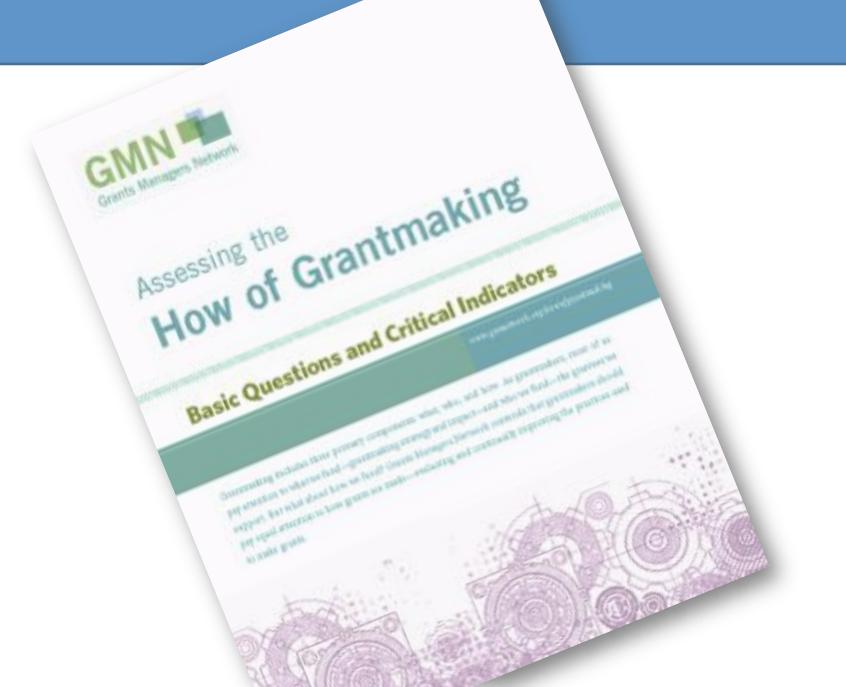
"...if our unique contribution is grantmaking, <u>how</u> we make grants must be just as strategic, just as focused on outcomes, as anything else we do."

Mandy Ellerton, Community Innovation Director
The Bush Foundation









Five Core Questions

1. Does our grantmaking align with our intentions?

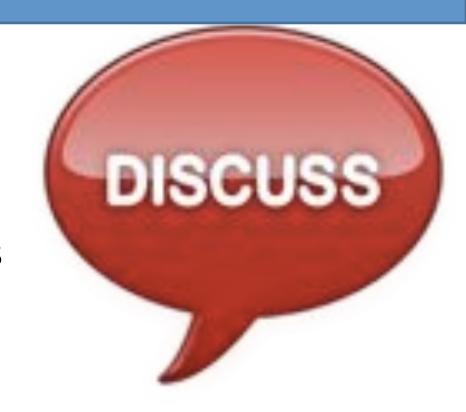
5. Does our process strengthen and support grantees?

2. Are our grants structured to be successful?

4. Are we communicating effectively?

3. Are we efficient in our internal processes?

What kinds of questions do you have about your grantmaking practices?

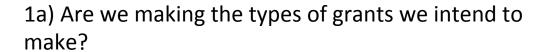


How do you find answers?



Core Question 1:

Does our grantmaking align with our intentions?



1b) Are we funding the types of organizations we say we want to fund?

1c) Is our process appropriately competitive?

1d) Is our organization taking the right amount of risk in our grantmaking?

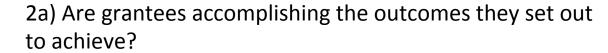
1e) How do our grants decisions today affect our future grantmaking?





Core Question 2:

Are our grants structured to be successful?



2b) Do our grants require substantial modification or are they correctly structured from the onset?

2c) Are our grants at the level of significance that we intend?

2d) To what extent are our grant periods timed appropriately?

2e) Are we paying multi-year grants as planned?

2f) Do our grants support our grantee's articulated needs?



2a) Are grantees accomplishing the outcomes they set out to achieve?





Core Question 3:

Are we efficient in our internal processes?

3a) How much does each grant cost us to make?

3b) What is the elapsed time from application (or LOI) to grant payment?

3c) Are portfolio sizes appropriate for diligence, efficiency, and reasonable workload?

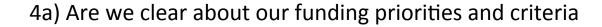


3a) How much does each grant cost us to make?



Core Question 4:

Are we communicating effectively?



4b) Do we communicate clearly about the size of our usual grant?

4c) Does our application process make sense and work well for grantseekers

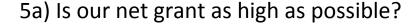
4d) Is our customer service prompt, courteous, and helpful?





Core Question 5:

Does our process strengthen and support grantees?



5b) To what extent are unsuccessful applicants spending time on our requirements?

5c) Are we supporting the infrastructure and true costs of the organizations we fund?

5d) Are reports helping us and grantees to learn and grow









How have you used information (internal or external) to learn:

- 1. Does our grantmaking align with intentions?
- 2. Are our grants are structured to be successful?
- 3. Are we efficient in our internal processes?
- 4. Are we communicating effectively?
- 5. Does our process support and strengthen grantees?

What is **one new piece of data from your internal databases** that
you could collect (or analyze) to
learn something important about
your practices?

What is **one new piece of data you could gather from grantees** or
other external stakeholders to
learn something important about
your practices? How might you
gather it?



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Jessica Bearman
jessica@bearmanconsulting.com
www.bearmanconsulting.com