

# Foundation Self-Assessment

Asking and answering powerful questions  
about your organization



Philanthropy Southwest Fall 2016

***“...if our unique contribution is grantmaking, how 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**









# Assessing the How of Grantmaking

## Basic Questions and Critical Indicators

[www.gmnetwork.org/development](http://www.gmnetwork.org/development)

Grantmaking includes three primary components: what, who, and how. As grantmakers, none of us  
has a monopoly on what we fund—grantmaking strategy and impact—and who we fund—the grantees we  
support. But what about how we fund? Grants Managers Network provides the grantees we  
fund equal attention to how grantmakers work—evaluating and increasing the effectiveness of the practices used  
to make grants.



# Five Core Questions



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

How do you find answers?





YES

NO

MAYBE



## Core Question 1:

# Does our grantmaking align with our intentions?

1a) Are we making the types of grants we intend to make?


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?





I thought more of them  
were general operating  
grants... what a surprise!

## Core Question 2:

# Are our grants structured to be successful?

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

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?

4a) Are we clear about our funding priorities and criteria

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?

5a) Is our net grant as high as possible?

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





Colorado Health Foundation  
Karen McNeil-Miller, President & CEO





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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