Sharpen Your Grantmaking Application Process:

Perspective and Experience from the Community Foundation Field

July 27, 2016
Welcome

Agenda

- Introductions
- Housekeeping Items
- Resource Guide: A Grantmaking Primer
- A common application among funders
- An open grant cycle
- Measuring outcomes vs outputs
- Re-Calibrate: Connect to what matters
- Q&A
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Sharpen your Grantmaking Application Process

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Executive Director | Community Foundation of Utah

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Vice President, Indiana | Aly Sterling Philanthropy
Why start with the application process?

It all starts with what you ask for.
Immediate questions to ask yourself
When was the last time we reviewed our app?
Who did we engage in the review process?
What is our end goal?
Are we drowning in paperwork?

- Project Streamline: Drowning in Paperwork, Distracted from Purpose
What kind of zoo are you running? Does your app say something about your foundation?
Knowledge Center

How can the Knowledge Center benefit you?

– Knowledge@cof.org is an easy access point to help you navigate to the Council’s knowledge resources
– Connections to in-house subject matter experts and peers

Resource Guide:

– Practical how-to from RFP to grant agreement with sample documents
Looking to streamline and improve:
How the common application came to be
  – A funders’ collaboration
  – Identifying an universal need from nonprofits

Developing the common application
  – Input from each funder—what to cut?
  – Identifying a platform (SHARE New Mexico)
  – Pooling funds to develop the tool
  – Launching the tool (PR, press, outreach)
  – Success/challenges to date
Open Grant Cycle

Is competitive grant cycles the only way?
- Are nonprofits applying just because there is a deadline?
- What if they could apply when it meets their planning cycle?

What can it do to my workflow if nonprofits could apply when they need or want funding?

Could an open-grant cycle really work?
- How do you prioritize or coordinate funding?
- Will money run out?
- What is the basis for how we decide to give the money away?

What difference will it make?
- Will it reduce or increase the number of applicants?
What is the difference between outcomes and outputs?

- **Outputs:** Things you can count and verify. Understanding that the funds were used in the manner promised.
- **Outcomes:** Has the problem you intended to solve by funding this grant moved the needle in any way?

Is your application leading to the right measurable?

- Are you in a position to articulate needs to donor advisors or direct funds from unrestricted or field of interest funds?
- What is the desired outcome for your community, project or grants?
- Are these priority needs reflected in your strategic grantmaking goals or strategic plan?
- Does your application/criteria reflect these needs/outcomes?
Many of you may have already identified your greatest needs, but if not...

- Gather data from existing sources (hospitals, health departments, state school boards and other county/state entities) to understand where the gaps are.
- Invite the community/donor advisors, etc. in to share what they think the needs are.
- Discuss not only the problems/issues, but also solutions? Fundamental problems are not typically issues that can be solved by one organization.
The Role of Your Strategic Plan

– Determine the role your foundation should play in your community in the various outcomes you wish to see.

– Compared to other strategic goals of your foundation, how high is this on your priority list and what should be a grant priority.

– How do these decisions impact our application?
  • (If you don’t ask for it, you won’t get it!)
  • You may have to do some outreach/education.
Impact on Grant Guidelines

– Align your grantmaking criteria to needs.

– Educate your grants committee on the needs.

– Shows your community you listened and are responsive and desire to lead in this area.
  • Makes you accountable to the community at-large.
IMPACT! But how?

– Consider multi-year grants timed with your strategic plan goals (3-years).
– Enter in to true partnerships and spend quality time together negotiating the true results/impact you desire.
– Most of the time, the grantee is the expert, not us.
– Be flexible in changing course if needed.
– Bring the community along.
– Encourage collaboration and involvement!
Measuring Outcomes – Case Study

Diagram: Project Service and Payment Flows

1. Funder(s)
   - Provide up-front financing
   - Repays funders if outcomes met

2. Special Purpose Vehicle
   - Based on evaluation results, determines payment amount
   - Success Payments if outcomes met

3. Service Provider(s)
   - Providing housing services
   - Provides payment for services

4. Target Populations
   - Designs evaluation methods and measures outcomes

5. Salt Lake County
   - Project Manager
   - Manages project performance, reporting

6. Third Sector
   - Provides technical assistance and advisory services

Additional Notes:
- Alex Eaton
  - Community Foundation of Utah
- Jen Pendleton
  - Aly Sterling Philanthropy
- University of Utah
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Target Success Rates</th>
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<tbody>
<tr>
<td>Months without any Shelter or Jail</td>
<td>Number of months in which an individual does not reside in any emergency shelter in after randomization</td>
<td>Improve months without jail/shelter for placed participants by 30%, from 16 months to 21 months</td>
</tr>
<tr>
<td>Graduations to Permanent Housing Location</td>
<td>Number of participants who graduate to a permanent housing location after randomization</td>
<td>80% of placed participants will graduate to a permanent housing location</td>
</tr>
<tr>
<td>Mental Health Service Enrollments</td>
<td>Number of enrollments into mental health services after randomization</td>
<td>Improve mental health enrollments for placed participants by 100%, from 12% to 24%</td>
</tr>
<tr>
<td>Substance Abuse Disorder Service Enrollments</td>
<td>Number of enrollments into substance abuse services (excluding detox) after randomization</td>
<td>Improve substance abuse enrollments for placed participants by 100%, from 10% to 20%</td>
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Q&A:

• Questions

• Continue the Conversation

*The Philanthropy Exchange*

exchange.cof.org
Continue the conversation at www.exchange.cof.org

Log in with your e-mail and password for the Council's website.

CCFE Affiliates: Defining Roles with Affiliate Funds
Web Resources
www.cof.org
www.cfstandards.org
Project Streamline

Questions?

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