

RCPA Conference 2019
Staunton Farm Foundation Grantmaking
Site Visit Checklist

1. Potential grantees either call or email office about potential funding and to discuss their project. Some organizations do not call or email and mail in a letter of inquiry.

Letters of Inquiry/Intent (LOI) are concise, 1-3 pages consisting of the organization's contact information, mission, brief overview of the organization, project/program introduction, purpose, need in the community, population, cost, and timeframe.

2. When reviewing the initial inquiry, staff examines if the program/project aligns with foundation's mission/values, if it is needed in the community, if the service already exists within the community, if it is an evidence-based practice, if there are any other partners/funders involved, who is performing evaluation, and if it is sustainable.

3. After initial screening, staff will invite the organization to submit a full proposal.

4. When reviewing the full proposal, staff asks the following questions:

a.) The proposal describes the project and the agency applying for funding. We request a listing of the Board of Directors with committee assignments, Curriculum Vitae of key agency and project personnel, sources of income and other foundation support, the agency's annual report, their latest audited financial statement, current annual operating budget, and sustainability plan.

b.) We also want to know: How does agency plan to evaluate the project/program? How will the information learned be disseminated to the community?

c.) How will agency support the project/program after grant termination? Proposal request must be signed-off by the CEO or Board Chair.

During the proposal review process, staff gathers input from community stakeholders (usually someone from the United Way and/or county administrators and other foundations). Staff asks stakeholders whether the service is needed, who else is doing it, and if the stakeholders support the project/program. Staff researches cost of program/project to determine if organization can do with less money or if the program can realistically be achieved with organization's capacity.

Staff determines which grants are at highest priority by: if the services are needed in the community, cost, potential impact, quality of project/program that will be delivered, and whether program/project can be duplicated in other communities.

5. After proposal review, staff compiles specific questions regarding request. A site visit is scheduled with the agency and questions asked are listed:

A) ORGANIZATIONAL STRUCTURE:

1) How is the organization structured?

- a) Good to see an organizational chart
- 2) What is the board's level of involvement?
 - a) Is the board a working or advisory board?
 - b) What are the board committee assignments?
 - c) Is the board's expertise a good fit with the organization?
 - d) Is there balance and diversity on the board?
- 4) Are there volunteer and consumer opportunities available in this organization?
- 5) What are the organization's long-range plans?
 - a) How was it developed?
- 6) Who licenses or accredits this organization?
 - a) Are their licenses or accreditations current?

B) FACILITY ASSESSMENT

- 1) Is the location accessible to the client population?
- 2) Is the space conducive to the program and accessible to persons with disabilities?
- 3) Is the facility compliant with zoning, building codes, etc?

C) ORGANIZATION'S OVERALL PURPOSE

- 1) What is the organization's mission statement?
- 2) What are the organization's strengths?
- 3) Are there any significant challenges facing the organization?

D) GRANT PROPOSAL EVALUATION:

Evaluation:

- ~ Who will be performing the evaluation
- ~ How will the project be measured and what instruments will they be using
- ~ What are the intended outcomes

Sustainability:

- ~ How will the project be sustained
- ~ Has agency talked with county departments of sustainability
- ~ Any fundraising or other grants pending?

Recommendation:

Highest Importance: Is the proposal request needed and will it impact the population in need; is there is a thorough sustainability plan – along with proposal there may be letters of support from stakeholders in community or letters from governing bodies stating whether they plan to support project after the Terms of Grant ends. Does the model/approach use best-practice and/or is evidence-based; is the agency's capacity sufficient or do they need additional assistance; will a grant will further the organization's mission and increase access for people to receive more direct services and is the organization relying on the grant for operating expenses.

Medium Importance: Is the request already occurring in the community, but the need is larger than one organization. Is the sustainability plan feasible, but does the organization have the capacity to add another program/training/etc.; is the evaluation thought out and are staff responsible for the plan; how will the proposal impact the community?

Lowest Importance: Proposal request is already in the community but by multiple resources. Other grants have been awarded within the last several years and outcomes were not satisfactory. The sustainability plan is not feasible (i.e. the organization will solicit funds from individual donors to continue grant). The evaluation plan is weak, not communicating desirable outcomes.