**Initial or First Cut Review**

A common first step is a preliminary review of key information to narrow down applicants to those who are strong (e.g., meet minimum standards).

This step might eliminate applicants that:

» Do not fall into the grantmaking entity’s funding areas.

» Are ineligible due to size, location, or other criteria specified in grant guidance.

» Have extremely weak answers to key substantive questions.

**Full Review**

In conducting a full review, it is helpful to have a system and criteria. Systems include things site visits and due diligence processes. Processes include rating matrices and scorecards.

» They must be suited to foundation culture.

» They must be suited size and purpose of grant.

» It can be time consuming to conduct a full review and while conducting the review, there is trade-off between thoroughness and efficiency that needs to be balanced.