



Funding Decision Process

1. Who Makes the Funding Decision
 - a. Individual or group decision
 - b. Determining Their Intent
2. How Decisions are Made and Typical Recommendations
 - a. Matrix
 - b. Sample Recommendations
3. Communicating Recommendations to Trustees/Board
4. Communicating Decisions to Grantees

Making Recommendations

Presenting clear, concise recommendations within your own communication style is critical to your foundation making strong funding decisions and helping grantee's successfully fulfill the requirements/purpose of the grant. It is critical that you understand the processes and individuals involved in making your funding decisions.

- » Understand that your **personal communication** style is important communicating your recommendations. Within your personal communication style, consider:
 - Is there a formal or informal tone to your communications?
 - Do your decision makers prefer or require a different tone than you naturally use?

- » Determine the **best method** for communicating your recommendations by asking yourself:
 - Do decision makers prefer or require verbal information or written information?
 - If written, what format – quick e-mails with lots of attachments or written summaries (or dockets) of all information gathered?
 - If verbal – in person, over the phone, during a meeting?
- » **Balance** between the amount and type information you deliver.
 - Do they require data or analytical information?
 - What is too much and/or too little information for them to make an appropriate decision?

Funding Recommendations

- » **Do not fund**
- » **Fully fund** the proposed project/no stipulations
- » **Fully fund with stipulations**
- » **Partially fund** project—maybe to “test” the proposal
- » **Provide technical assistance** to better prepare the organization for future funding
- » **Funding** something different

Best Practices

- » Present **succinctly and clearly key reasons for recommendation** (should come from funding guidelines and results of due diligence/review).
- » **Use dockets** (summaries of grants presented in group).
- » Keep summary per grant to **1–3 pages**.
- » **Include in summary:**
 - Brief grant purpose
 - Overview of organization
 - How grant fits with foundation guidelines
 - Financial overview
 - Your professional recommendation and why

Helpful Tips

- » **Understand norms and expectations** of foundation.
- » **Develop a sense of your board members**, who they are, and what they want.
- » **Practice!** Know your time frame. Find role models. Learn from their strategies.
- » **Get feedback.**