



THE COMMUNITY FOUNDATION
of Muncie & Delaware County, Inc.

Strategic Grantmaking Assessment Tool

The goals of our strategic grantmaking program include: 1) to be community minded; 2) to work in partnership with other funding sources; 3) to focus on long term effects; 4) to help pull organizations together in collaboration; 5) to address gaps in current funding; and 6) to be measurable.

Organizations will make presentations upon the request of staff to the Strategic Grants Committee. Strategic grantmaking is not limited to a formal cycle, formal name or to only one idea.

In order to evaluate potential projects, the enclosed assessment tool has been developed for discussion. It begins with reviewing the mission, vision, and strategic plan of The Community Foundation.

OUR MISSION

The Community Foundation of Muncie & Delaware County, Inc. encourages philanthropy, assists donors in building an enduring source of charitable assets, and exercises leadership in directing resources to enhance the quality of life for residents of Muncie and Delaware County.

OUR VISION

To impact and empower Muncie and Delaware County by enabling philanthropy as a trusted community leader and promoting positive change now and for generations to come.

OUR STRATEGIC PLAN

Asset Development

- Continue to build endowment by focusing on increasing the unrestricted fund
- Develop working relationships with professional advisors to enhance awareness of creative methods of giving and promote Legacy Society
- Cultivate relationships with and solicit local donors
- Prudently manage investments/endowed funds

Grantmaking

- Support the local nonprofit sector through good grantmaking
- Establish a proactive grantmaking program, linking funding priorities to community needs
- Measure outcomes and impact of funded programs
- Build collaborations

Community Engagement

- Increase and develop The Community Foundation's relationships with local nonprofit organizations
- Promote nonprofit organizational effectiveness
- Increase community understanding of the Foundation while educating the public about philanthropy

Board Approved 9/18/17

- A. Is the project a good fit for The Community Foundation to be involved?
1. Does the project align with our mission and vision?
 2. Does the project align with our strategic plan goals?
 3. Is the subject area a priority to us?
 4. Is the project ready for our involvement?
- B. Does the project address a compelling community need?
1. Does the project address a critical community goal (ex: Vision 2021, MAP, other community plans)?
If so, which one _____
 2. To what extent is the goal of this project important to the community?
 3. Would addressing this need truly improve the quality of life of the community?
 4. Is it possible this project will have lasting, long-term benefits to the community?
 5. Does the project have other community partners working towards the same goal?
 6. Does the project have a current funding gap (too few funders)?
- C. Will The Community Foundation's involvement be meaningful?
1. Will our involvement increase the likelihood of success towards the community goal?
 2. Do we have enough grant dollars to make a significant impact?
 3. Will our involvement create an opportunity to share our knowledge?
 4. Will our involvement allow us to make meaningful connections?
 5. Can we be of assistance to the organization to determine performance measures? List them.
- D. Is there a reason not to get involved; what are the risks?
1. Is there a risk of increased scrutiny of the Foundation?
 2. Is there a risk of political controversy?
 3. Is there a risk of donor alienation?
 4. Is there a concern about organizational leadership?
 5. Are there other risks?
 6. How can we justify the risks if the potential benefits are worthwhile?
 7. How do we manage identified risks? List possible risk management strategies.
- E. What is The Community Foundation's desired outcome for the initiative?
1. What outcomes are we looking for?
 2. What would it take to succeed?
 3. Can we measure outcomes and progress through grant reporting? List possible reporting strategies.
 4. What is our strategy to communicate to staff, board, stakeholders and the community? List the overall message and medium.
- F. What is our exit strategy?
1. Is self-sufficiency for the project eventually expected?
 2. Is the effort sustainable once we are no longer involved?
 3. What is a reasonable timeframe to end our involvement?
 4. Consider an exit strategy to transfer or terminate support.

Transfer Considerations

- Consider slowly transitioning by decreasing our funding
- Have another organization take responsibility for significant portions of the project
- Transition organization to apply for a quarterly competitive grant

Termination Considerations

- The outcomes established have been achieved and need has been met
- The environment has changed significantly and the project can no longer be justified or sustained
- The funds have been exhausted and there is no capacity to raise additional funds



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www.cfmdin.org • (765) 747-7181

Strategic Grantmaking Procedures

The Community Foundation of Muncie & Delaware County, Inc. has committed to establishing a strategic grantmaking program as part of the approved strategic plan for 2016 -2021. The program will be designed to link funding priorities to community needs. The following information is the recommendation of the Ad Hoc Strategic Grantmaking Committee regarding the program priorities and procedures.

Program:

The strategic grantmaking program is defined as an initiative of the Board of Directors. Recommendations will be determined by a committee of the current and immediate past Board Chairs and up to two additional Board members to be determined by the President. The goals of the program include: 1) to be community minded; 2) to potentially work in partnership with other funding sources; 3) to focus on long term effects (including emerging projects); 4) to help pull organizations together in collaboration; 5) to address gaps in current funding; and 6) to be measurable. *See Strategic Grants Committee Talking Points.*

Procedure:

The following procedures have been established and will be evaluated annually for changes.

1. The program will be funded through unrestricted or field of interest funds. The committee shall determine and recommend specific funding sources based on current available fund balances outside of the unrestricted budget utilized for competitive grantmaking.
2. The committee shall determine and recommend priority areas based on the current needs of the community and funding sources available.
3. There will be no public announcement regarding the program. Staff will proactively and quietly work in the community to determine projects and will present possible ideas for proposals to the committee. Grantmaking for the program will not be restricted to a specific cycle or one idea so staff will continually work towards program goals.
4. The committee will direct staff to request proposals for projects of interest. Funding is not guaranteed.
5. Proposals are by invitation only and will not include a formal application process. Instead, staff will direct organizations to develop a presentation to make to the committee including a question and answer period. *See Request for Strategic Proposal.*
6. The committee will utilize an open ended scoring model to determine interest. *See Strategic Grantmaking Assessment Tool.*
7. Committee will make final grant recommendations to the Board as applicable.
8. When grants are approved by the Board, staff will provide grantees with requirements and engage in mid-term monitoring throughout the grant period. *See Strategic Grant Requirements.*
9. Grantees will be required to report back to the committee and/or Board through a presentation to fulfill their post grant reporting requirement. The grant period may be longer than the typical one year grant period utilized for competitive grantmaking as determined by the committee and staff.

Board Approved 9/18/17

Strategic Grants Committee Talking Points

The Foundation has established a strategic grantmaking program, linking funding priorities to community needs.

The program:

- Is an initiative of the Board of Directors of the Foundation as part of our current strategic plan
- Is community minded
- Is potentially in partnership with other funding sources
- Is focused on long term effects
- Is intended to help to pull organizations together in collaboration
- Addresses gaps in current funding
- Is measurable
- Is focused on emerging projects
- Will be reevaluated every year (priorities, funding amount, organizations to be approached)
- Is funded through unrestricted and field of interest funds as determined by the committee

The process:

- Is an RFP process (proactive or competitive inquiries are NOT permitted from any organization)
- Is staff initiated
- Requires NO formal application
- Requires NO formal cycle
- Requires NO formal name
- Is NOT limited to one idea
- Request for proposals will be extended to organizations by staff to be a presentation to the committee directly with a period of time to ask questions.
- Will utilize an open ended scoring model to determine eligibility. Exit strategy will depend on the project and will be evaluated in the scoring model.
- Committee will make final grant recommendations to the Board as applicable throughout the year. There could be a year that no grants are made depending on the presentations.
- Staff will engage in mid-term monitoring of the project and report back to the committee.
- Our process will move alongside the Funders Forum process.
- Will not likely use the online system.
- Post grant reports will be a presentation to the committee and submitted in writing.