Areyvut Seminar on Teen Jewish Philanthropy
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Site Visits, RFP & Allocations:
How to identify and evaluate worthy programs

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BEFORE GETTING STARTED

I. **Need to decide what exactly you want to fund and who is eligible to apply**
- **Broad Scope vs Specific Program Areas**:
  o **Broad:** encompassing multiple areas or themes such as helping the Jewish Community, New and Innovative Programs
    o **Pros:** There will be a wide range of program areas to consider, appealing to most of those making the decisions. Opportunity to learn about many different areas.
    o **Cons:** Could be too general for a limited amount of money. Could be comparing apples to oranges.
  o **Specific:** limiting to one or a few areas such as Jewish Education, Special Needs, Safety-net services, at-risk families
    o **Pros:** Specific focus, easier to compare programs
    o **Cons:** Not everyone may be interested in the area selected. May be too narrow in focus
- **General Operating Support vs Program Support**
  o **General Funding:** Supports the overall operation of an agency allowing them to use the money as they see fit.
    o **Pros:** Supports the many functions of a worthwhile agency,
    o **Cons:** Is not a specific program that people can wrap their hands around, difficult to establish measurable results
  o **Program:** Supports a specific project
    o **Pros:** Specific programs are easy to understand and measureable objectives can be established,
    o **Cons:** For the agencies, it is less desirable
- **Local vs National/International Program**
  o **Local:** Either a local agency or a National Agency with a local program
    o **Pros:** Can be visited and possibly one that local individuals can volunteer for
    o **Cons:** Impact is often smaller than a National Program. The type of program that has the greatest interest might not be available locally or can not be implemented locally
  o **National/ International:**
    o **Pros:** Can offer wide visibility and impact, can find programs that meets the criteria if one is not available locally
    o **Cons:** Might not be able to be visited
- **Existing Program vs New Program**
  o **Existing:** A program that has been operating for at least 1 year
    o **Pros:** Can have a demonstrated track record, can be visited and observed
    o **Cons:** Is probably not "new or innovative"
  o **New Program:**
    o **Pros:** Something currently not being implemented in the Community has a certain appeal.
    o **Cons:** No ability to know whether the program will be effective

II. **Need to decide who can submit proposals: Open vs Closed system**
- **Open:** Issue a press release about the availability of funds and open it up to any agency
- **Closed:** Send request for proposals only to select organization

THE SEARCH FOR PROGRAMS

I. **The RFP – Request for Proposals**
- **Definition:** A document that is sent to potential grantees where you are requesting them to respond to questions that will give an understanding of the organization/agency and the program for which they are requesting funding.
- **Elements of an RFP**
  o **Statement of the Purpose of the Funds:** How much is available, for what purpose, for how long, who can apply
  o **The Application (Request for Funding)**
    o **1 page summary:** Generally called an **Abstract**, this is a one page summary that briefly explains the problem, describes the target population, what the plan is, how this will address the problem, and the cost.

    o **Who are You:** Generally called **Agency Capability**, this section should include a brief description of the agency, when founded, brief history, programs offered. This section should answer the question: **What have you done lately?**

    o **What's Missing in the World:** Generally called **Statement of Need**, this section should describe the "current state of affairs" It should include statistics. This section should answer the question: **What's the problem & Why is this important?**

    o **Who Needs this Help:** Generally called **Target Population**, this section should describe the demographics of the people that will be helped or will participate in the program. This section should answer the question: **Who will be assisted by your program?**

    o **What's Your Plan and How Will This Solve the Problem:** Generally called **Approach**, this section will describe the action plan and the specifics of the program as well as how and why the proposed program is the best method for meeting the needs described previously. This section should answer the questions: **How will you accomplish what you say you are going to, why did you choose this method and why will this work?**

    o **What do you expect to happen:** Generally called **Results**, this section should specify the Goals, Objectives and Measurable Outcomes expected. This section should answer the question: **What are the benefits of this program.**

    o **How will you know if it worked:** Generally called **Evaluation**, this section will specify how the program's success will be measured. This section should answer the question: **What constitutes success?**

    o **What is the cost:** Generally called **Budget**, this section includes a line-item budget usually with the following Expense Categories: Personnel, Fringe, Travel, Equipment, Supplies, Other. The budget should also detail income sources.   Either a budget narrative can be requested or a justification column that explains the budget item in more detail, such as the hours/wk or FTE for personnel , miles to be driven, equipment to be purchased, etc. Also should answer how the program will be continued when the grant runs out, which could be in another section called **Sustainability**.

    Another key question is collaboration, which can be its own section or part of the **Approach** section. The key question is: **Who else will you partner with to make this happen, make sure that there is no duplication of service and reach the broadest number of individuals.**

III.   Evaluating proposals
- **Weighting the categories:** What is the most important section, how many points should it be worth, what is next, etc.
- **How well did the applicant follow the instructions:** If they can't follow the guidelines and format, can they run the program?
- **How well did they answer the questions, do the answers make sense**
  - **Agency Capability:** Does the agency's past experience demonstrate that they have the ability to run the program, do they have the staff, supervision capability, fiscal responsibility
  - **Statement of Need:** How serious is the problem to be addressed, what are the consequences if it is not addressed
  - **Target Population:** How well was the population described? Is it the population that you want to help?
  - **Approach:** Does the plan make sense? Is it realistic?
  - **Results:** Are the results measurable? Does it go beyond just serving a certain number of people? Will the approach lead to the expected results? Are the results expected consistent with the purpose of the funds?
  - **Evaluation:** Is there a plan to evaluate success?
  - **Budget:** Is the budget realistic? Are the expenditures justifiable? What is the cost per participant? Is the cost justifiable and is the program cost effective? What is the likelihood of sustainability after the grant runs out?
- **Who will review:** Will everyone review all of the proposals? Will there be teems to narrow down the group and then everyone reviews the semi-finalists? Pros & Cons.

IV.   Site Visits
After narrowing down the field of applicants from the masses to the more manageable few, site visits can further help in gaining an understanding of the program, the participants, the personnel and the administrators. For existing programs, it allows you to see the program in operation as well.
- **Before the Site Visit**
  - Review the proposal and budget
  - Discuss questions regarding the proposal and if possible, get the questions to the agency in advance in order to maximize the visit
  - Decide who you will meet with: CEO, Program Staff, Participants, Volunteers, Lay Leaders
- **At the Site Visit**
  - Meetings with key people
    - CEO – do they have the experience and vision
    - Program Staff – do they have a good rapport with participants
    - Participants (if there are no confidentiality issues) – are they happy with the program? Are they achieving the results expected
    - Volunteers – are they excited about the program?
    - Lay Leaders – Are they committed to the program, to advocating for it, to providing support and possibly funding?
  - Viewing the Program in Action
  - What is the facility like
  - Questions
    - What is a success story
    - What are the biggest challenges
  - Explain the Committees Next Steps

V.   **Making the Decision**
- **Considerations in making the decision**
  o What does the group want to do with the money in general.. what type of program do they want to support… or what is the mission for spending these dollars
  o How well do each of the programs fit with how they want to spend the money
  o Is the need urgent
  o Is other funding available (which can be a positive and a negative when considering the request)
  o How many people will be served (and is this important)
  o Is this innovative and a one-of-a-kind program or are there similar programs
  o Is the population to be served at-risk
  o What results are expected and are they measurable
  o Are there opportunities for hands-on involvement by committee members?
  o How many programs should be funded… smaller amount of money for 3 or more programs, one grantee awarded the entire amount.
  o Will the program be able to be run with less money than requested
  o Can the program be sustained
- **Ways to make decision**
  o A score sheet – possibly weighting each of the above questions to what in most and least important, scoring each applicant on each question.

Bottom line, in a new teen philanthropy program, the teens can be part of the decision making process and should contribute to the development of an RFP, to the decision on who should be included in site visits, to what should be considered in making the decision to how to make the decision.

The process can is often viewed by the agencies and programs as "jumping through hoops" and it may be appropriate to have them jump through hoops for a large amount of money, but for $1,000 or less, it is not. The process must be appropriate given the level of funding available.

Make the process age appropriate. As part of Federation's allocation process, we review Agency Financials. Obviously, teenagers are not going to do this.

Peoples own preferences or feelings are going to come into play. To the extent possible, there should be a disclosure of any special interests in a particular program (e.g. a sibling participates in the program).

Everyone should have the opportunity to express their feelings and opinions.

The decisions are difficult, the participants may feel frustrated at hearing about all of the needs and programs, each having its own merits. There is no way to fund all of the programs and expectations should be managed. It would not be wise to give an insignificant amount of money to all of the programs in order to avoid saying, "NO" if the money will not enable them to run the program. Saying no is a part of the process.