

Alan Sweifach, UJA Federation of Northern NJ Site Visits, RFP & Allocations

A) What you need to know or think about before even starting programs

- First think about which broad area you want to help, then look at specific areas within that broad category that you want to fund.
- When you have a broad goal, you are basically guaranteed that everyone will be interested in something, but it may be too general when it comes down to the actual grant allocations. It also makes it difficult when coming to deciding between funds.
- In a specific goal, it's easy to choose where to give, but you may have a hard time getting everyone interested.
- General operating support – underscored the importance of general operating support.
- Teens want to give money to things they can touch/feel and see the benefits of. They don't understand giving to agencies and federations as much as to places that do stuff.
- You need to have faith in the organization you're giving to. You should see their financial plans and statements to see if they are a suitable organization.
- Show teens budgets so they see where the money goes.
- Look at local versus international.
- Local is easy for teens to see, but the impact is smaller than national or international.
- An existing program versus a new program.
- Existing programs have demonstrated track records, you can really see what they do. But teens may be looking for something new and cutting edge.
- You need to decide who can submit proposals and how to get them.
- Proposals are open or closed. Open is like putting an ad out and letting everyone who wants to apply. In closed, you handpick organizations to look at.

B) The search for programs- how do you identify them and find worthwhile ones

- RFP- request for proposals, a document you send to prospective grantees asking them for proposals.
- An RFP needs a statement of the purpose of the funds- how much is available and what is it going to be used for.
- There needs to be a summary or an abstract.
- Larger amounts of money usually involve more detail because people are willing to put in more time for it.
- An RFP should ask those making proposals who they are, what have they done and what is their ability to do the project.
- What's missing in the world? Statement of need, what's the problem and why is it important?
- Who will be assisted by the program?
- What is your approach to solving the problem? And why did you choose this method?
- What do you expect to happen as a result of your program?
- A program shouldn't just get the grant and that's it, they should report back with what they're doing with it.
- How do they plan to figure out if what they did worked?

- While it may be good for the teens to write up the RFP, they may want unreasonable amounts of information from the organizations considering the amount of money they're giving out so their have to be some controls on what they do.

Budget

- Where are you getting the money from and how are you going to sustain this project after we give you our money?
- Who, if anyone, are you going to partner with?

Evaluating programs

- You can have different categories to rate the programs with
- Look at how many people they help, how their budget is, how well they answered the questions on the RFP, does the agencies past experience give you the feeling they can handle it, what is their target population, is the cause they want to work for really worthwhile, is their plan well set, are the results they want realistic, do they have a plan t evaluate success, are their expenditures justifiable.
- Not every teen can read every proposal, but you can still allow teens to discuss the plans and look at them all. But, people are going to support the programs they read about and not care as much about other programs.
- Site visits are great opportunities for the teens to see what the organization is really about. Preferably, the teens should write up questions to ask and discuss in advance to send in. They need to decide who at the site they want to talk to. But again, depending on how much money they give the agency will put out different efforts.
- You want to make sure whoever speaks with the teens can relate to them.
- Do the people you meet with have a good rapport with their co-workers?
- You're probably not going to meet with the recipients of the charity because of confidentiality.
- Are volunteers working for the organization excited about it?
- Ask the organization to tell you a success story or a challenge they have faced and what they're plan for addressing the challenges are.
- When you decide which of the proposals to fit, you see how the proposal fits what you want to help and see how urgent their need is. Look how many people are going to be served by the funding. Are there opportunities for hands on involvement? Can the program be sustained? Do you want to divide the money between different places?
- Ask them if they can still run the program if they get less money.
- Teens should be involved with every step because it is a tremendous learning opportunity for them.
- Teens need to know that they can't say yes to everyone. They need to make real decisions so they can give real amounts of money to people.