

The logo for the Idaho Women's Charitable Foundation (iwcf) is centered on a horizontal banner. The banner has a background of a low-poly, geometric pattern in various shades of blue, ranging from light sky blue to dark navy blue. The letters 'iwcf' are rendered in a bold, white, lowercase sans-serif font. The 'i' has a small square dot above it. The 'w' and 'c' are connected, and the 'f' has a short vertical stem.

IDAHO WOMEN'S CHARITABLE FOUNDATION



Grants Education Session: Site Visits

February 9, 2021

IWCF MISSION

Idaho Women's Charitable Foundation fosters educated philanthropy through collaboration, pooled resources and individual giving to positively impact the community.

What We Do: Award Grants

Projects, programs, services, or items that address demonstrated needs in Southwestern Idaho.

- Expansion of a Program: Geographically or Demographically
- A Critical Need in the Community
- Operational expenses related to a program
- Re-Establishing a Program

What We Do: Award Grants

Look For:

- **Innovative** and **Creative** approaches to community challenges.
- Plans for **Sustainability** beyond IWCF funding period.
- IWCF to contribute a **substantial percentage** of funding

Application Process/Flow

- **Interest Area Committee Review** - Is the request sustainable? Organization sustainable? Worthy project? Strong impact? Service critical need? How does the project compare to the other applicants?
- **Site Visits** - 3-4 per committee, visit organizations, ask further questions, meet leadership team
- **Member Q/A** - Chance to answer questions from members not on a grants committee.

Application/Process Flow

continued...

- **Proposals to the Ballot** - 2 per interest area
- **Members Vote** - Last several years over 98% of IWCF Members participated in the voting process.
- **Grants Awarded**
- **Assessment Committee** - Begins work with grant recipients.

Trends: This Year's Site Visits

- 9: Children (14)
- 6: Rural communities (7)
- 12: Low-income families (6)
- 1: Refugees (1)
- 10: Entire communities (10)
- 3: Incarceration/Addiction/Mental Health (5)
- 0: Women's issues (2)
- 4: Outdoor recreation/education
- 7: COVID Response
- 3: Nutrition
- 2: Dental



iwcfc

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What Happens on A Site Visit

Up to this Point:

- Reading Applications and Discussing amongst Interest Area groups

At the Site Visit:

- Observe what is happening at the nonprofit
- Listen to nonprofit staff, board, clients
- Ask questions
- Take Notes!!

What Happens on a Site Visit?

We meet and engage:

- Ask all questions identified by the IA team (and record answers)
- If questions were sent in advance, make sure we get answers
- Ask questions that come up in the moment
- Answer questions about the next step of the process
- Remain neutral
- Do not mention competitors

Site Visits 2020... Virtual

- Encourage Creativity
 - ◆ Video Tours, Pre-recorded Information
- More Involvement: Nonprofit and IWCF Members
- **Zoom is already so hard!!!** How are we going to encourage open and honest dialogue.
 - ◆ Ask questions in advance
 - ◆ Review materials in advance
 - ◆ Confirm who will be attending from each group. Be specific if there is a person at the organization you want to talk to
 - ◆ Add titles & affiliation to zoom name
 - ◆ Designate a leader & Note Taker

What Happens After the Site Visits

- IA Committee will meet
- Compare and contrast applications
 - ◆ Talk through pain points
 - ◆ Double check the financials and sustainability (both project and organization)
 - ◆ Think about the projects execution
 - Does the organization have the resources to get it done? People, Dollars, & Time
 - Is the timing right for the project?

What's Next?

Today and tomorrow

- Site Visit Organizations are notified by Interest Area or Site Visit Leads that they have been selected for site visit - process is explained - dates are selected
- Organizations not moving to site visit receive regrets letter
- IA Leads are given site visit contact info
- Site Visit worksheet are online today

Over the Next Week:

- Site visit leads communicate with committee to ensure that at least 3 members will attend the site visit.

How We Assess and Evaluate

- Align request with our criteria
- Review written materials ahead of time
- Focus on the **facts** – share what you hear and observe
- Discuss and Listen - follow up with additional questions if necessary
- Compare and contrast
- Pay extra attention to all facets of the application

Leading a Site Visit?

Your responsibilities:

- Send a reminder the day before, including any necessary logistical info both to committee and nonprofit.
- Schedule a pre-meeting before the site visit with all attendees (meeting can be 30 minutes before the visit)
- Assign Tasks:
 - Who will lead?
 - Who will ask questions?
 - Who will take notes?

Attending a Site Visit?

Here are your responsibilities:

- Review all relevant documents including
 - Grant application
 - Questions submitted in advance, and any responses
 - Questions still to be asked, including any new ones that you identify
- Communicate with Site Visit Lead about any questions or issues that arise
- Be prepared to share your findings

Online Site Visit Worksheet

Organization Name, Interest Area, and amount requested

Date and Time of Site Visit:

Address:

Leader:

Attending:

Summary: (taken verbatim from grant application)

Critical Need: (taken verbatim from grant application)

Questions for Site Visit (and Answers**):**

Compelling Aspects (as related to our criteria):

Risks:

Recommend to Ballot?

What Happens after Site Visits?

Each Interest Area Committee will:

- Hold a follow-up meeting after all site visits are completed
- Agree on a recommendation to the full grants committee regarding ballot selections
- Submit summaries prior to the ballot meeting (which should include responses to questions asked)
- Designate one or more individuals to respond to questions about the organizations at ballot meeting/Q&As

Maintain the Integrity of the Process and IWCF



- Discretion and confidentiality are still in place - don't speak about the other candidates
- Be respectful during the visit
- Demonstrate a sense of balance
- Be proud of our process - represent IWCF well

Final Thoughts....

- Keep in mind that a winning project must be possible for us to **follow** and **assess**.
- Site Visits give us a window into who is steering the ship - **leadership matters**. If the leader changes, are they sunk?
- Is there transparency and **accountability**? Were questions fully answered and requested documentation provided?
- Don't ignore red flags! Their (in)ability to arrange your visit can be telling.

Upcoming Dates

- **February:** Site Visits
- **March 4:** Site Visit Summaries due
- **March 10:** Grants Ballot Q/A: 11:30-12:30 (virtual)
- **March 15 :** Ballot distributed to membership
- **April 1:** Ballots due at noon
- **April 6:** Winners notified
- **May 11:** Annual Meeting