

How We Assess Organizations

In assessing grant applications, the Endowments' program staff considers the applicant's organizational strengths and weaknesses. As a rule, we look to fund strong organizations, because they are better equipped to execute their plans and deliver results that have real and lasting value. In some cases, however, we may fund organizations specifically to help them correct or overcome areas of weakness. To assess the overall strength of an organization, we apply the judgment and expertise of our seasoned grant-making team. Guiding their assessments, however, are the four criteria listed below.

A. Program Impact

1. Quality program design has a measurable impact on the quality of life in the region.
2. Programs are important to the community, as seen in residents' participation in program design and in their use of the organization's services.
3. Programs are aligned with the strategic direction of the Endowments. They have clearly articulated and viable strategies for success, and demonstrate the best practices of the sector.
4. Program has a great "upside," or a potential to make a significant impact on the quality of life in the region. Its staff demonstrates a capacity to learn and to improve the organization.

B. Executive Leadership

1. Articulates a compelling vision for the role of the organization in the greater community.
2. Inspires trust and support from constituents and the general community through commitment, creativity and character.
3. Brings vision to fruition through appropriate staffing, strategy development and consistent follow through.

C. Financial Health of the Organization

1. Sustainable financial model established in light of current and projected community support, an endowment where appropriate and fees for service.
2. Healthy balance sheet maintained according to industry standards.

D. Positive Board Involvement

1. Strong board leadership evidenced in significant financial contributions and visibility in community on organization's behalf. A "significant" contribution will vary from organization to organization.
2. Board members are aware of and effective in their fiduciary responsibility, which means they review financial statements and project the organization's financial future.
3. Board has an appropriate relationship with the organization that reflects the need for separation between governance and day-to-day management.