FOUNDATION**SOURCE**

Measuring Effectiveness Checklist for Private Foundations

To help you evaluate if your charitable funding is effective, we've crafted the following questions for you to ask your grantees about the projects and initiatives you're supporting for them. You can request written responses, audio/video or even invite them to discuss the questions during an in-person meeting. You can use this checklist to better understand your grantees and to determine the charitable impact the grantees are making with your funding. It can also help you gauge how your grantees perceive you as a funding partner and if there's anything that you can be doing to better support them.

Start Here: What Data Do We Need?	Complete
Before you question your grantees, determine the type of information you want to obtain from them. Ask yourselves the following: • How do we define effectiveness? • Are we aiming to confirm effectiveness for the short term, long term or both? How do we define short term and long term? • What information would most help us confirm that our funding is effective? Quantitative data (e.g., statistics)? Qualitative data (e.g., anecdotes, case studies, testimonials)? Both? • Can the information we need be addressed with a standard report that the grantee already produces? Or must the grantee create something unique just for us? **Best Practice:** *As you decide what questions to ask, consider that every data request you make will likely pull the grantee's staff from another task. Be honest with yourself about how critically you need certain information. If it won't ultimately serve a purpose or make a difference, think carefully about refraining or prioritizing only the most essential information.* **Tip:** *Consider aligning your evaluation with the size and duration of the grant at hand. For instance, reviewing a one-time $25k grant likely doesn't require the same degree of exploration as a $250k grant or a multi-year grant.*	☐

Front-End Questions: Before We Get Started ...
Complete

These questions are best asked *before* your funding begins so grantees can understand up front how you will evaluate them and can plan accordingly. They're often asked as part of a grant application. The goal is for you to set expectations early in the relationship that there is an expectation around tracking and reporting on effectiveness.

- How will your organization use our funding and why? Please provide specifics regarding the need(s) you intend to address.
- Briefly provide us with a statement that indicates the impact you anticipate achieving by the end of the grant period. (An impact statement should indicate the change you wish to make, for whom and by when.)
- If our funding is for a specific program, please provide details. What are the program's key elements that are critical to achieving your intended impact?
- How will you monitor your progress toward making your intended impact? What tools, information or evidence will you use to confirm success? How will you know when your program's impact has been achieved?
- Are there any other aspects of your program that you would like to share with us?

Tip: If you're reviewing a returning grantee, your foundation might already have the answers to some of these questions from a previous evaluation. If this is the case, consider (for time's sake) permitting the applicant to simply update their original responses.

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Back-End Questions: How Far Have We Come?
Complete

When the grant period for your support comes to an end (or is at a pivotal stage), the following questions can help you gauge the effectiveness of your funding. They can also help you better understand your grantees and their needs, should you wish to continue supporting them.

- How is our funding affecting your organization? What impact is it making on the participants of the program? On your operations? On your mission? On your goals? On your organizational health?
- How will you sustain your results now that our grant period is over? Will you pursue additional funding? Develop new programs?
- How is your organization performing overall and how do you assess its performance?
- What is your long-term outlook for your organization? Do you need assistance with planning and strategy?
- Is there anything more/less/different we could have done as your funding partner to change the results for this grant?

Tip: Invite the grantee to submit feedback not just at a predetermined time, but any time they would like. Providing this open-ended opportunity increases communication and might alleviate the need for additional reports that could be burdensome.

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Funder/Grantee Questions: How Are We Working Together?

Complete

To build and maintain productive funder/grantee partnerships, it's helpful to examine how you and your grantees engage with each other throughout a grant period. Consider asking the following:

- How do you feel about working with our foundation? What's most helpful and least helpful about our funding process, our communication and anything else that comes to mind?
- Are there any additional resources or opportunities we could be offering to support your organization?

Tip: *Sharing the aggregated information you collect with your grantees will not only build trust but also encourage further open and constructive dialogue.*