

Task 5: Grant Proposals

The big Idea of this task:

Jewish values guide us in developing a system for reviewing grant proposals.

By the end of this task, campers will be able to:

- Define RFP (Request for Proposals).
- Develop a system for evaluating grant proposals, based on Jewish values and their teen foundation's mission statement.
- Evaluate grant proposals from the organizations that the campers will consider supporting.
- Brainstorm a list of questions for their upcoming site visits based on the grant proposals from those organizations.

During this task, campers will grapple with:

- What qualities of an organization do I think are important when making a funding decision?
- How does our foundation's mission statement guide our giving?
- Which grant proposals am I most interested in and why?

You know you have been successful with this task when:

Campers can explain what an RFP is, and utilize the plan they have created to evaluate the grant proposals that they have received.

To have on your "radar screen":

- Remember that each teen foundation needs to evaluate 3 grant proposals, and consider those 3 organizations for funding.
- Some teen foundations may use the grant proposal phase to narrow down the applicant pool, and only consider the organizations that make it past that phase for funding. Only give your campers that choice if the schedule truly allows for it.

Raising the Bar

Ideas for further programs and integrating the task into the camp day

- Invite a local philanthropist or camp board member to talk about his/her grantmaking process

Sample Activities

- Sample 1: Grant Proposals (Adaptable program for one facilitator/ multiple facilitators)
- Sample 2: Developing Criteria for Proposal Evaluation/Proposal Reading (Sessions 13/14)
*From the Union for Reform Judaism-Jewish Teen Funders Network Teen Philanthropy Pilot

Sample 1: Grant Proposals: **Adaptable program for one facilitator/multiple facilitators**

Overview

During this task the teen foundations will meet to discuss the grant proposals that were submitted by the non-profits. They will help create the evaluation sheet that they will use to evaluate grant proposals and site visits. During the task wrap up activity, the teen foundation will prepare for their site visits.

*If you are working with multiple teen foundations, have them break into their teen foundations for this program.

Group Type

Adaptable program for one facilitator/multiple facilitators

Space Needed

An enclosed area with a wall to tape up the enlarged copy of the teen foundation's Mission Statement and the enlarged Mission Driven Evaluation Sheet.

Supplies Needed

- A "packet" for each camper that has copies of all of the grant proposals that you have received.
- A copy of the blank Mission Driven Evaluation Sheet for each camper (Appendix 1)
- A copy, made on a large piece of butcher paper, of the table on the Mission Driven Evaluation Sheet (to be filled out as a sample together)
- Your teen foundation's mission statement written in large print on a piece of butcher paper
- Tape
- Pens

Prior to the program

- Read through the grant proposals so that you are familiar with them and can answer questions for campers.
- Be familiar with how site visits will work. Will all of the campers be visiting every site? Will the campers be visiting the sites in small groups and reporting back to the full foundation? This program has notes on how to adapt it for both of these models.
- Create an enlarged copy of the table on the Mission Driven Evaluation Sheet using poster board or butcher paper.
- Look through the sample Mission Driven Evaluation Sheet (appendix 2) so that you understand and feel comfortable leading campers through this process

Timetable (60-70 minutes)

5 minutes- Review

5 minutes – Breaking Down our Mission

15 minutes- Creating our own Mission Driven Evaluation Sheet

25 minutes – Group Work – Evaluating the grant proposals

10 minutes- Wrap Up

Review and Introduction (5 minutes)

1. Remind the campers that during the last program they had the opportunity to look at mission statements from different organizations and discuss how their missions align with the work of the organizations.
2. Ask campers to share an example of how one of the organization’s mission statements aligned with the organization’s work.
3. Explain to the campers:
 - Today we are going to review the grant proposals that we received from non-profit organizations. You may want to show them the Request for Proposal form and explain how you received these grant proposals.
 - A request for proposal is a call to organizations to submit grant proposals, in this case to our teen foundation.
 - Take a look at the document and you will notice that the organization provided their mission statement. Why do you think we had them do this? (*Answer: we want to find out if their mission statement aligns with our mission statement, we want to better understand their work*)
 - During the task today we are going to use the organization’s mission statement and grant proposal as a guide to determine if the mission of the organization aligns with our mission, and if the organization’s mission statement aligns with the project for which they are asking for funding.
 - You will also have an opportunity to prepare any questions for our site visits.

Breaking down our Mission (5 minutes)

1. Explain to campers that they are going to break down their mission statement into 3-4 core pieces. Breaking down their mission statement will make it easier to use it as a tool to evaluate organizations.
2. Point to the large copy of the mission statement. Ask campers to suggest lines/breaking points between the ideas. Explain to them that it is like breaking the full statement in to “bullet points.” You should have 3-4 sections. Mark the “breaks” on the mission statement so that campers can easily see it.

Creating our own Mission Driven Evaluation Sheets (15 minutes)

1. Explain to the campers: We are now going to work together to fill out your own Mission Driven Evaluation sheets for each organization that is requesting funding.
2. Pass out the grant proposals that were submitted by the organizations.
3. Explain to campers that they will be working on one together as a sample.
4. Bring out the large poster with the Mission Driven Evaluation form on it. Write down the “broken down” mission statement with one idea in each box. Explain to the campers that they will be doing this same activity when they work in their groups to evaluate the grant proposals that were submitted by the other organizations.
5. Ask campers to quietly read through the first proposal.
6. When they have finished (3-5 min) ask them to start filling in the boxes on the form. What did they learn about the organization from their mission statement and funding request that aligns with their own teen foundation’s mission?
7. As campers share ideas, fill in the squares. Explain that the column for “rating” the organization should be done AFTER their visit (if they will visit the organization), as they will probably learn more information then.

Group Work – Evaluating the grant proposals (25 minutes)

1. Break campers into the same number of groups that you have grant proposals. Have them read through all of the grant proposals. This is so they are familiar with all of the organizations that they will be considering. Once all of the groups are done reading the grant proposals assign each group a proposal to analyze.
2. Remind them to add any other questions that they have about the grant proposal on the back of the page.
3. Once the campers are finished filling out their Mission Driven Evaluation sheets have them regroup.
4. Have the groups share the questions they wrote down for the site visits and any additional information they learned from the grant proposal. Campers should fill in their blank copies (one for each organization) of the Mission Driven Evaluation sheet while they are listening to the groups present about the other organizations. *(If they are not visiting every site you will want to consider whether there is an opportunity for a staff member to pass along any questions back to the organization.)*

5. Once all of the camper groups present, assign roles to each camper for their visits to the organizations. (*Who will introduce the group, ask the questions, etc.*)

Wrap Up/ Site Visit Prep (10 minutes)

1. Explain to the campers that you are going to take some time to review the trip to the organization(s):
 - Logistics
 - Appropriate conduct at a non-profit AND as a representative of your teen foundation and camp.
 - Remind the campers to dress appropriately.
 - Bring their Mission Driven Evaluation forms.
 - Remind the campers to look for how the organization embodies the values and mission that they described in their grant proposal.
2. Ask the campers if they have any questions and congratulate them on their progress. Explain that you will be returning the forms to them before the site visit.

Sample 2: Grant Proposals:

Adaptable program for one facilitator/multiple facilitators

UNION FOR REFORM JUDAISM CONGREGATIONAL PHILANTHROPY PILOT

SESSION 13: DEVELOPING CRITERIA FOR PROPOSAL EVALUATION

Goals:

The goal of today's session is to articulate the factors we need to consider as we review completed grant proposals. By the end of the session, we will reach agreement on how we will evaluate proposals to make thoughtful funding decisions.

Materials:

Copies of your RFP, if desired

Art supplies, if needed

Three texts on allocations handout

Grant review criteria handout

Session introduction and opening ritual

15 minutes

Begin with your opening ritual. Share with the group that receiving and reading proposals is one of the most exciting parts of the process. Today we will be coming to agreement about how to evaluate the proposals we receive in order to make grant awards. You may wish to have teens take a moment to look at your completed RFP, and provide an update on who it has been sent to. If you have received any completed applications (it may be too early for this) share this information to generate more enthusiasm for this stage of the process.

Allocating justly

20 minutes

To set the stage for thinking about our funding criteria, we will be looking at three Jewish sources that speak to the challenge of allocating money justly. Teens will have an opportunity to teach these texts to each other.

Divide the participants into three small groups. Each group will be assigned a text. They will have 10 minutes to read it, consider its meaning and decide how to share the wisdom of the text with their peers in a meaningful way. They may choose to make a poster, perform a brief skit, or think of another creative way to get the essential message of the text across.

The three texts are as follows:

On giving to family first:

“If a person has enough food in his house and wishes to use it for charitable purposes to support others, he should first support his father and mother; if there is anything left he should support his brothers and sisters; if there is anything left he should support his other relatives; if there is anything left he should support his neighbors; if there is anything left he should support those who live on the same street. Thereafter he should distribute charity liberally to the rest of Israel.” Midrash Tana Devei Eliyahu, Chapter 27

On giving to non-Jews:

“In a city where Jews and non-Jews live, the Tzedakah collectors collect from Jews and non-Jews and support Jewish and non-Jewish poor; we visit Jewish and non-Jewish sick and bury Jewish and non-Jewish dead, and comfort Jewish and non-Jewish mourners, and return lost goods of non-Jews and Jews, to promote the ways of peace.” Jerusalem Talmud Demai 4:1

On giving locally versus globally:

“Greater needs precedes lesser need...the poor of a person’s own city have precedence over the poor of another city, and the poor among a person’s relatives have precedence over non-relatives. On this my teacher writes: the poor of a person’s own city have priority over those of another city only if both are in need of basic food and clothing. But if the poor of a person’s own city have enough for their basic needs but for no more, while the poor of another city do not have enough for their basic needs, the latter have precedence.” Chatam Sofer Responsum 231

Following each of the three “presentations” ask teens who watched the presentation to summarize the key message, to be certain that the theme was clear. Time permitting; ask teens to consider the meaning of each of the texts for our grant making.

How will we decide

25 minutes

Explore the following with the group:

1. What are some ways we are formally evaluated in life?
2. What do you imagine will be the challenges of evaluating the proposals we receive?
3. Brainstorm the criteria we think will be important in evaluating proposals

Based on this discussion, review the sample grant review criteria form, used by the Jewish Youth Philanthropy Institute of Greater Washington DC. Discuss with the teens what changes or adaptations they feel are needed to this form for it to be useful. Remind teens that our next session will be a working session where we will all be reading our completed proposals.

URJ Teen Philanthropy Pilot

Session 13 – Developing Criteria for Proposal Evaluation

Grant Criteria Review Form

Please score each answer with 1 being the lowest and 10 being the highest. Rank each project on its own merit. DO NOT RANK BASED ON COMPARISONS TO PROJECTS

SPONSORED BY OTHER AGENCIES.

Name of Project _____ Agency _____

1. _____ I understand and support the mission of this organization.

Comments:

2. _____ This project is needed in the community.

Comments:

3. _____ I understand this proposal and I think it will work.

Comments:

4. _____ This program will change the lives of those it serves.

Comments:

5. _____ The amount of funds requested in the budget seems reasonable and the organization is using the money wisely to accomplish its goals.

Comments:

6. _____ The program presented is creative.

Comments:

7. _____ The staff has a good plan and seems knowledgeable about this new project.

Comments:

8. _____ This project could be successful without full JCYF funding.

Comments:

9. _____ This project is consistent with Jewish values because...

Comments

(This handout generously shared by the Jewish Youth Philanthropy Institute of Greater Washington DC)

SESSION 14: PROPOSAL READING

Revised 2012

Goals:

The goal of today's session is to read the proposals we have received. We will each be reading the proposals individually, circulating them around the room.

Materials:

Copies of all proposals received
Comments sheets stapled to back of each proposal
Pens and paper

Session introduction and opening ritual

15 minutes

Begin with your opening ritual. You may wish to have your guiding statement posted in the room for inspiration.

Proposal reading

45 minutes

Explain that this proposal reading session will be very informal.

There are two options for proposal reading.

Option 1 is to circulate the proposals throughout the room, giving each teen a chance to read and comment on each proposal individually.

Option 2 is to place teens into groups of 2-3 to read proposals as a group and discuss what they read with the others.

Attach a comments sheet to the back of each proposal, so that teens can write their own comments, and read those of the teens who reviewed the proposal prior to them as well. The comments sheet should ask teens to identify:

- Exciting elements of the proposal
- Challenging elements of the proposal
- Things we need clarification about

[Process note: Several teen foundations have found that this process is more efficient if it takes place in a teen's home, or another informal setting. Be sure to provide lots of snacks, and either have music available, or encourage students to bring their own. If you have received a large number of proposals, you may need to consider allocating two sessions for the reading process.]

Appendix 1
Mission Driven Evaluation Form

Organizations Name _____ Funding Amount Requested \$ _____

1. Write down the “broken down” mission statement for your teen foundation in the column in the first column
2. Read through the grant proposal from the organization that you are evaluating and fill in the other columns

Our teen foundation’s Mission Statement Breakdown	Based on their Mission Statement and grant proposal, how does this organization align with the mission of our teen foundation?	Mission Statement alignment score 3 – aligns perfectly with our mission; 2- somewhat aligns with our mission; 1 – doesn’t align with our mission	What values do you see represented in the grant proposal?	What questions do you have for the organization?

Appendix 1 – page 2

Additional questions we would like to ask the organization:

Observations during the site visit:

Appendix 2
Mission Driven Evaluation Form

Organizations Name sample soup kitchen Funding Amount Requested \$ 500.00

The evaluation form you create with your campers will look something like this. This page is provided to give you an idea of what you are creating.

Our teen foundation's Mission Statement Breakdown	Based on their Mission Statement and Grant Proposal, how does this organization align with the mission of our teen foundation?	Mission Statement alignment score 3 – aligns perfectly with our mission; 2- somewhat aligns with our mission; 1 – doesn't align with our mission	Which values did you see in the proposal?	What questions do we have for the organization?
<i>Each person is created B'tzelem Elohim – in the image of God. Therefore, our teen foundation supports organizations that treat people with honor and respect while helping them.</i>	<ul style="list-style-type: none"> <i>Their mission statement says all people deserve respect</i> <i>In addition to requesting food, they are asking for money to get table clothes to give the soup kitchen a more homey feel</i> 		<i>Respect- All people deserve respect</i>	<i>What are the different ways you fulfill your mission to treat all people with respect?</i>
<i>We believe it is important to not only help someone that day, but to provide ways for the person to become self-sustainable.</i>	<ul style="list-style-type: none"> <i>They try and help people connect with other social services to get long term support</i> 		<i>Community- They work hard to help connect people to organizations in the neighborhood so that each person feels like they are a meaningful part of the community.</i>	<i>We saw that you try and connect people with other social services. How do you do this?</i>
<i>While we help people, however, we need to remember to care for the earth and to use renewable resources in all we do.</i>	<ul style="list-style-type: none"> <i>Nothing in their write up on this</i> 			<i>In addition to helping people, our teen foundation is concerned with the environment. We know this is not at the core of what you do, but we were wondering if you recycle or if you use sustainable items like real plates instead of paper.</i>

