

A TOOL FOR MORE EXPANSIVE DECISION-MAKING

MY PURPOSE IS TACTICAL	I NEED INTERMEDIARY THAT CAN	I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES	ASK
<p>I want to support an organization that doesn't have a 501(c)(3) designation and cannot meet our fiscal management and oversight requirements.</p>	<p>Provide fiscal sponsorship and other financial management services</p> <p>Advise on legal and regulatory matters</p>	<p>Strong fiscal controls and administrative capacity</p> <p>Ability to work directly with funded projects, conduct due diligence, and manage grants</p>	<p>Does this potential grantee need only fiscal sponsorship or does it need additional financial and management assistance? What kind of fiscal sponsorship and other supports does it need?</p> <p>Does the organization want or need its own nonprofit status?</p> <p>Can the organization get help from an existing entity that provides fiscal sponsorship and additional services OR will two different entities be required?</p>
<p>I want to deploy grants to a set of smaller organizations, but the administrative burden of funding so many organizations is too high.</p>	<p>Regrant funds to many organizations efficiently</p> <p>Manage/oversee all aspects of regranting at a large scale</p>	<p>Knowledge of and experience in developing, monitoring, and administering applications and managing grants for large philanthropic organizations</p>	<p>Is this a better use of foundation financial/staff resources than doing it ourselves?</p> <p>How many grants do I need help managing?</p> <p>Do I need help with just the administrative elements of regranting/reporting, OR do I need help with ongoing oversight/management of the grants? Or both?</p>
<p>I want to reduce the difficulty smaller groups have in trying to navigate our processes (e.g., applications, reporting, etc.), which are complex and designed for large organizations.</p>	<p>Assist organizations in navigating these processes</p> <p>Be a liaison between applicants and foundation program staff to clarify issues and communicate concerns/information</p> <p>Assist in developing evaluation measures/systems for assessing progress, outcomes, and other information helpful to both the foundation and grantees</p> <p>Help staff clarify and convey internal administrative and evaluation processes so they are more easily understood by and transparent to external audiences</p>	<p>Knowledge of/experience with large foundations' internal programmatic functions and decision-making processes</p> <p>Willingness to be transparent with and advocate for grantees/applicants when appropriate/needed</p> <p>Problem-solving and mediation skills</p> <p>Experience developing and implementing evaluation and other assessment processes</p>	<p>Which systems are most challenging to my grantee(s) and why?</p> <p>How much outside assistance might organizations need and how much can foundation staff provide to meet that need?</p> <p>Can I work with organizations to develop evaluation/reporting measures/processes rather than using outside help?</p> <p>Am I willing to let organizations design and conduct their own evaluations, including progress/outcome metrics?</p> <p>How can our foundation improve our internal systems to be more accessible, transparent, and less burdensome for organizations?</p>
<p>There has been an unforeseen crisis that requires getting grant funds distributed quickly.</p>	<p>Regrant funds to many organizations efficiently and expediently</p> <p>Manage and oversee all aspects of regranting (especially to smaller organizations)</p>	<p>Experience and administrative capacity to move funds quickly, especially to smaller organizations</p> <p>Streamlined fund distribution processes</p> <p>Flexibility in responding to changing circumstances</p> <p>Proximity to/knowledge of the issue/region/constituency of interest</p>	<p>Are there potential risks to grantees that may be in crisis? If so, what can be done to ensure their safety?</p> <p>How much oversight, accountability, and risk are we asking the intermediary to assume?</p>
<p>I want to assess my organization's risk tolerance.</p>	<p>Absorb a layer of risk we cannot take on directly</p> <p>Assess risk as part of a due diligence process, especially for new initiatives or projects</p> <p>Provide ongoing monitoring to address red flags if/when they arise during the application process or grant period</p>	<p>Experience in (and tolerance for) complex and unpredictable circumstances</p> <p>Ability to intervene with potential solutions when problems occur</p> <p>Ability to manage the repercussions of "risky" grantmaking decisions and their effect in the field</p> <p>Legal experience or knowledge of potential legal issues</p>	<p>What kind of risk am I looking at?</p> <p>Am I focusing on risk assessment/ mitigation because I want to protect the grantees, the foundation, or both?</p> <p>Am I willing to have difficult conversations with grantees if/when there are red flags?</p> <p>Is there a process for brokering disagreements between grantees and staff if they occur?</p> <p>Is our legal staff able to step in if there are situations that require this kind of assistance?</p>

A TOOL FOR MORE EXPANSIVE DECISION-MAKING

MY PURPOSE IS STRATEGIC	I NEED INTERMEDIARY THAT CAN	I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES	ASK
<p>To meet our programmatic goals, we need to get resources to smaller groups we are unable to fund directly but don't know how to identify or reach them.</p>	<p>Research, identify, and conduct due diligence on these kinds of potential grantees</p> <p>Incubate potential projects</p>	<p>Deep knowledge of and experience in a particular issue/region/constituency that is relevant to our strategy/goals</p> <p>Ability to build, facilitate, and manage communication and relationships with diverse organizations and networks</p>	<p>Are smaller, local groups important to our strategy? To advancing the issue or field overall? Why and how?</p> <p>How can I avoid disrupting the field, causing unnecessary competition or distrust?</p> <p>How clear is our funding strategy to our intermediaries and/or potential grantees? Are we willing to revisit that strategy if organizations recommend changes?</p> <p>What type of relationship do I want to have with an intermediary that is working with these organizations? With subgrantees?</p>
<p>I want to ensure that the campaigns and initiatives we support rely on well-resourced, engaged, and mobilized local affiliates.</p>	<p>Build, nurture and coordinate strategic partnerships with organizations of all kinds that are essential to advancing issues and/or strategies the foundation is focused on</p>	<p>Has deep, trusted, and strategic relationships with constituent-led local groups</p> <p>Experience and capacity to lead effective campaigns</p>	<p>What collaborative relationships exist among groups already doing this work?</p> <p>What is the potential/desire to build collaboration? If so, what kind of collaboration and with which organizations as members?</p>
<p>Rather than creating something new to meet our strategic goals, I want to support and strengthen existing infrastructure.</p>	<p>Provide a funding mechanism that moves resources to infrastructure organizations supporting broader fields, issue areas, and/or sectors</p> <p>Leverage our support through collaboration with other funders that invest in infrastructure</p> <p>Help us develop a system for allocating a percentage of our grant budgets to infrastructure strengthening</p>	<p>Deep understanding of and experience with infrastructure building for various sectors, fields, and/or issues</p> <p>Experience with and trusted by other philanthropic institutions that have engaged in this process</p>	<p>Where is there donor interest on this issue/region/constituency? What other funders are active in this space? What groups are they funding?</p> <p>Is there a funder collaborative that supports issues, fields, and/or localities (and their infrastructure) that already exists that we could join?</p>
<p>We want to practice equity by allocating more resources to BIPOC-led organizations and those that center racial justice.</p>	<p>Help us clarify these values and operationalize them across the foundation</p> <p>Help use our power and influence to engage funders in shifting their practices toward greater equity</p> <p>Share financial risk when funds may not come through by providing "floating funds" or cash advances</p> <p>Build capacity-building support into grants</p>	<p>Ability to help organizations embed racial equity values and practices more seamlessly in every aspect of their work</p> <p>Experience in working with larger philanthropic institutions to embed these values more deeply across the entire organization</p>	<p>Which organizations that have this kind of experience are most trusted in the field/region of interest?</p> <p>Are we clear about what we mean by "equity?" How are we operationalizing that in our systems and practices, including grantmaking?</p> <p>To what degree will we use equity as the criteria on which we base decisions about which intermediaries we will use?</p>

A TOOL FOR MORE EXPANSIVE DECISION-MAKING

MY PURPOSE IS RELATIONAL	I NEED INTERMEDIARY THAT CAN	I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES	ASK YOURSELF
<p>I want to build a trust-based culture and practice at my foundation.</p>	<p>Work with foundation staff to examine internal systems and practices that may be burdensome to intermediary and community partners</p> <p>Design relational approaches into the foundation’s overall culture, grantmaking and policies</p>	<p>Familiarity with philanthropic systems and practices Experience with change management in large philanthropic organizations</p> <p>Willingness to be transparent and candid</p>	<p>Are some processes we assume to be standard self-imposed rather than necessary legal and financial guardrails?</p> <p>How can we reduce these to simplify application and reporting processes?</p>
<p>I want to mitigate the power differentials between large national funders and smaller, local groups while meeting my obligation to ensure that funds are used appropriately legally, and responsibly.</p>	<p>Work with foundation staff and leadership to explore power-sharing issues</p> <p>Work with foundation staff and grantees to cocreate clear parameters for grant oversight and accountability</p> <p>Create opportunities for grantees and others to partner with us in developing and making decisions about strategies, grant funding criteria, issue priorities, evaluations, and other grantmaking processes</p>	<p>Experience in participatory, equitable, and liberatory philanthropic practices</p>	<p>What level of power am I willing to shift/share with people outside the foundation in the various components of grantmaking processes? Are we willing to make decisions together?</p> <p>Can we deploy resources in ways that do not disrupt the power dynamics that may exist among groups working on/in/with similar issues/regions/constituencies?</p> <p>Do we have a process for responding if such a disruption occurs?</p>
<p>We want to engage with and learn from organizations proximate to directly affected communities.</p>	<p>Facilitate communication among philanthropic and community partners</p> <p>Share expertise about the issue/region/constituency</p> <p>Offer services that are available in multiple languages, allow full accessibility for those who are differently-abled, and acknowledge that access evolves and requires ongoing communication and learning</p> <p>Prioritize ongoing learning in alternative, non-normative organizational structures, leadership styles, and work practices</p> <p>Use staff members who are trusted, directly representing, or in active allyship with constituents</p>	<p>Staff are directly representing and/or in active allyship with community partners, their issues, and their constituents</p> <p>Skilled facilitators with strong equity values and practice</p> <p>Trusted partner and convenor</p>	<p>Are foundation staff open and willing to devote time and attention to learning from community partners?</p> <p>Is there a commitment to ensuring that the lessons learned are incorporated into the foundation’s overall strategy?</p> <p>What are we doing to ensure that we are not gathering knowledge in ways that are disingenuous, extractive, or onerous for intermediary and community partners?</p>
<p>To realize our equity values, we want to change our internal culture and practice.</p>	<p>Support movement and relationship building, leadership development, and coaching</p> <p>Share equity-rooted human resource practices</p> <p>Provide legal resources that include support for members of constituent-led groups undertaking high-risk action such as political disobedience or being attacked by groups that seek to discredit or harm their work</p>	<p>Demonstrated deep understanding of the unique challenges faced by people of color, youth, women, immigrants, members of the LGBTQ+ community, and other disenfranchised groups</p> <p>Experience in equitable grantmaking processes</p>	<p>Why do we think allocating more resources to BIPOC-led organizations is important? What is our definition of “BIPOC-led?”</p> <p>How important is it that the intermediary’s staff have lived experience with the issues/region/constituency we seek to affect?</p>
<p>We want to ensure that the campaigns and initiatives we support rely on well-resourced, engaged, and mobilized local affiliates.</p>	<p>Build, nurture, and coordinate strategic partnerships with organizations of all kinds that are essential to advancing issues and/or strategies the foundation is focused on</p>	<p>Has deep, trusted, and strategic relationships with constituent-led local groups</p> <p>Experience and capacity to lead effective campaigns</p>	<p>What collaborative relationships already exist among groups doing this work?</p> <p>What is the potential and/or desire to build collaboration and, if so, what kind of collaboration and with which organizations as members?</p>