

## The Art of Proposal Evaluation

*Martie Bernicker, philanthropy consultant, explained the Art of Proposal Evaluation to Impact100 Philadelphia members at a workshop Feb. 16, 2010. Below are notes and graphics compiled by Impact member Carrie Brodsky who attended the event.*

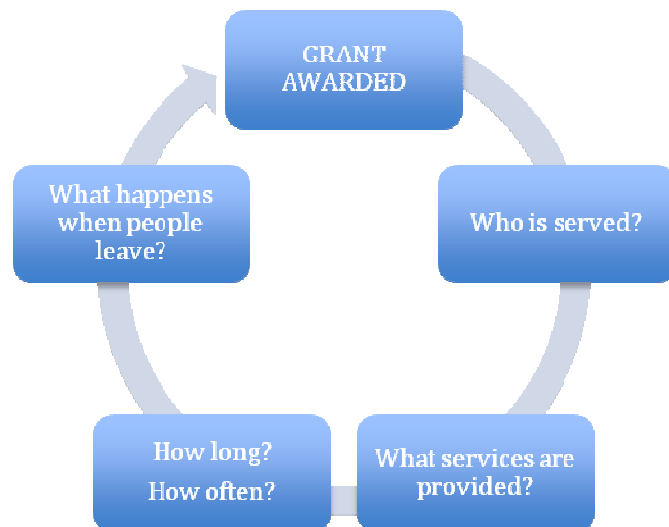
### **OVERARCHING IDEAS:**

- Read and evaluate proposals from a place of respect.
- Reading proposals is an art not a science.
- Recognize the difference between a great program and a great proposal.
- The more specifically a problem is identified, the more likely the need will be met.
- Certain needs are more compelling than others.
- Distinguish between underprivileged and underserved.
- **Invest where strength meets need.**
- Do not equate needs of the population with needs of the organization.
- Consider quantity vs. quality (number of people served vs. intensity of services).
- Is the program viable?? Are resources *proposed, pending* or *on-hand*
- Sustainability – usually depends on an existing *infrastructure*.
- Proposals should pass the “common sense” assessment.
- Trust your instincts! A site visit will let you know if you’re on track.

Martie suggests keeping these “visuals” in mind when evaluating proposals:

- Flow Chart
- Bull’s Eye

**Create a Flow Chart** when reading a grant proposal:



When reading a proposal try to make a distinction between:

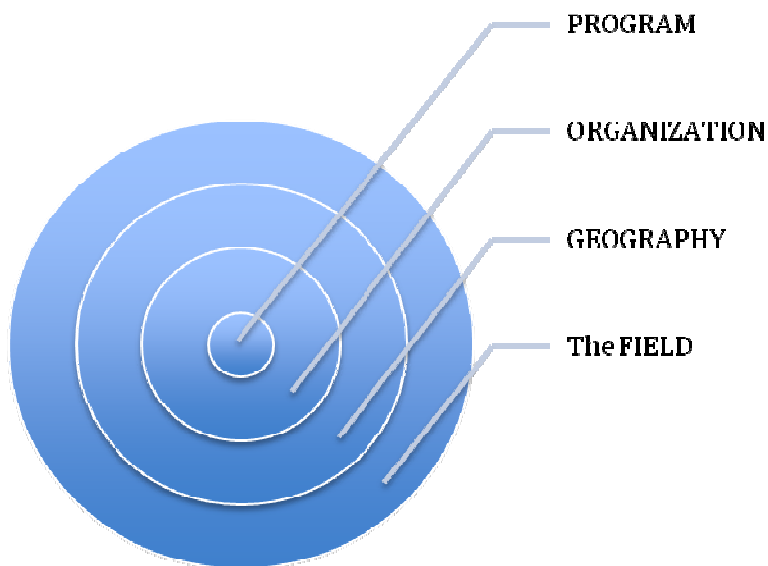
- Services offered
- Services utilized
- Services working

*TIP: When reading a proposal, write a \$ (dollar sign) next to anything that would cost money (staff, equipment, communication strategy, etc.) and examine the budget to correlate line items with \$ in the written proposal.*

### THE GRANT MAKER'S "HAT TRICK"

- Award has DIRECT IMPACT on real people
- Award IMPROVES the organization
- Award ADVANCES the field

Martie suggests that **context** matters. Programs should not exist in a vacuum. **Think about the Bull's Eye** -- with the funded program at the center! Although not always attainable, it's ideal when the funded program advances the field in which the organization is working (becomes a model for future programs, establishes a new benchmark for treatment/services/success, etc..)



**Create a Pie Chart** when considering personal charitable goals. The “pie” represents your total charitable budget.

- **Education** (your alma mater, your child’s school, etc.)
- **Family & Friends** (causes you support because they matter to F & F)
- **Community** (local library, fire, police, arts center, etc.)
- **WHAT’S LEFT?** – Create a STRATEGY for what you wish to accomplish with the remainder of your budget (perhaps make adjustments to the first three categories to enable you to reach personal charitable goals).

