



OF NEW JERSEY

Giving Together

Granting for Change

LOI (Letter of Intent) "Bucket" Meetings

***Involving 30 Members
in the Process***

Linda Sterling, Grants Co-chair
Pam Greenwood, Director

About the Jewish Women's Foundation (JWF) of New Jersey

- Donor-advised fund (DAF) housed at the Jewish Community Foundation of Greater MetroWest
- Giving Circle with approximately 50 trustees, 19 joined in last 2 years and 2 re-joined after lapsing
- Mission is to fund projects that support/empower women and/or girls
- Two grant cycles – Small grants (up to \$2500) in the fall, and Large grants (\$25-30,000) in the spring
- Our motto is “Giving together, granting for change”
- Thoughtful PROCESS to ensure that we could maximize involvement to make “giving together” happen
 - Process is important for continuity
 - Process was important consideration as JWF migrated to Zoom for meetings in 2020
 - Process necessitated by almost doubling our membership within a short period of time
- Opportunity for committee involvement (programming, finance, membership, etc.) but granting is essentially run by the Co-chairs and the entire membership IS the committee

Hakarat Ha-tov **(Giving credit where credit is due!)**



- 1.5 year process of change
- Process initiated by Judy Skillman and Linda Sterling as Grants Co-chairs
- Refined with the help of Susan Present, Carol Marcus and Debbie Turvey
- With assistance from Cheryl Rosario, prior JWF director, and Pam Greenwood, current director

Step 1 (Fall Season) Trustee Education and Training

- Fall grant cycle -- Smaller grants so it feels less threatening for newcomers to be part of the process and offer opinions
- Paired new trustee with experienced trustee to review an application and present at a meeting
- Many of these new trustees then rose to the challenge of leading site visits in the large grant cycle, i.e., created a stepladder for leadership development

About our Spring Grants Cycle

3-4 grants (year-dependent) for \$25-30,000

We give locally, and there is no requirement for giving Jewishly in this cycle



EARLY JANUARY – RFPs (Requests for Proposals) go out to 150 agencies



END OF JANUARY - Extensive Letters of Intent (LOIs) are submitted by agencies to JWF



MID-FEBRUARY – LOI Bucket Meetings via Zoom to narrow the list to 15-20 semi-finalists



EARLY MARCH – LOI Decision Meeting, trustees meet via Zoom to determine 7-10 finalists



EARLY APRIL – Finalists submit complete applications



MID-MAY – Site Visits in-person



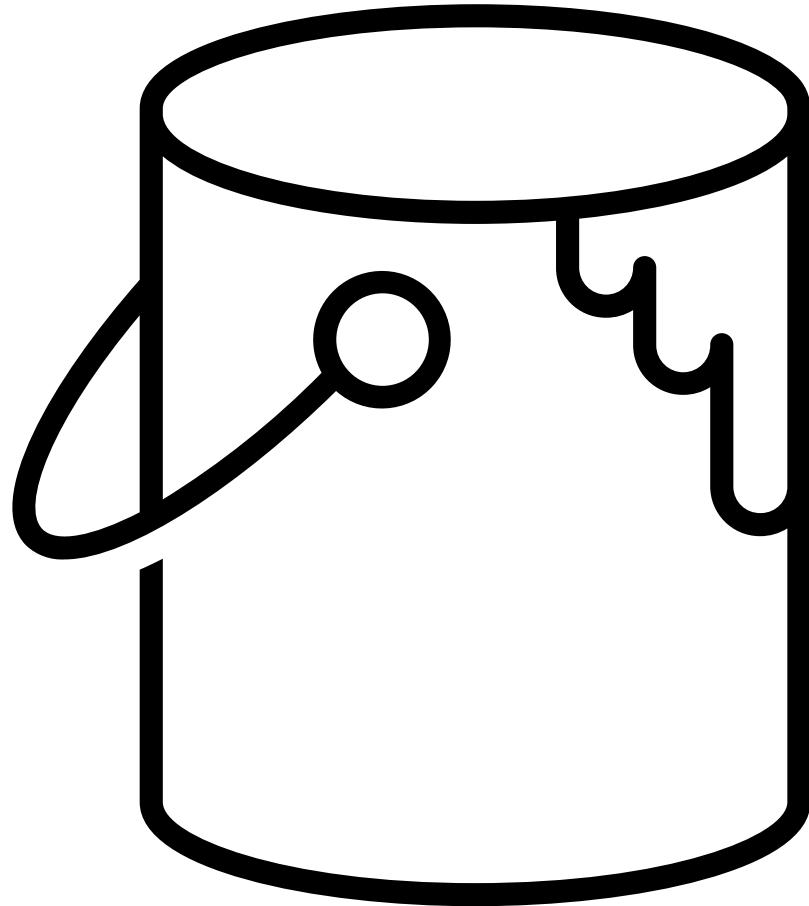
EARLY JUNE - Presentations of Executive Summaries to the Trustees and Final Vote via Zoom



EARLY JULY - Grants disbursed at the beginning of the next fiscal year

Step 2: LOI Bucket Meetings

- This year and last, over 50 grant applications
- Local need is tremendous and, for the most part, the applications were good ones and met JWF's mission
- Not a thematic process. Address any projects that support or empower women and/or girls
- Impetus for the Bucket process was based on:
 - involving a large number of members
 - involving new members, *and*
 - needing a good system to evaluate need with an overwhelming number of programs



Bucket Meeting Categories

- Divided into buckets as follows
 - Reproductive Health
 - Leadership
 - Mental Health (Substance Abuse Recovery)
 - Domestic Abuse
 - Education
 - Empowerment

Bucket Meeting Categories (cont.)

Health & Wellness,
Seniors

Food Insecurity, Period
Poverty

Career Readiness,
Financial Self-
Sufficiency

Homelessness, Justice

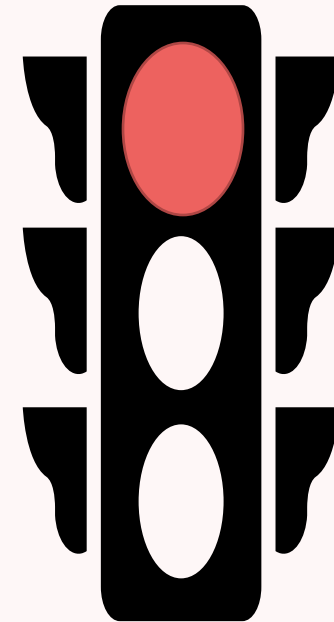
Immigrants, Disabilities

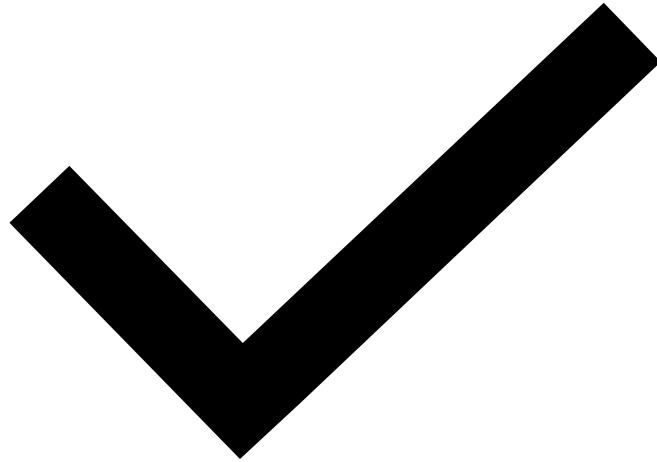
(In 2021, also had
buckets for Veterans,
Refugees)



How-to of Bucket Meetings

- Used a form (free at [Signupgenius.com](https://signupgenius.com)) to have women register for meetings based on the time or bucket that interested them most
- Held at different times of day over a two-week period in February
- LOIs were sent out in advance for pre-reading
- Up to 6 women at each meeting via Zoom
- Lasted about an hour
- Each LOI was discussed and the group members voted for green, yellow or red
- From each meeting, 1 or 2 were pushed ahead to the next stage, LOI Decision Meeting in early March





LOI Decision Meeting

- Open to all trustees via Zoom. Scheduled for early March
- Grants Co-chairs presented on the top 14 - 20 (year-dependent) with slides, approximately 6 minutes each
- This year, conducted Zoom poll with choice of 7 from total pool
- Top vote-getters advanced to next round for submitting full grant proposals and site visits

Rewards of Bucket Meetings



More than 30 women actively engaged

One woman, one vote

Experienced members provided history and context

Recent members provided new perspectives

Smooth process for whittling down numbers and collective decision-making

Leadership identification and development

Increased connections and socialization

QUESTIONS for us?

QUESTIONS for you...

- What systems has your foundation instituted to make the grant process work?
- What processes do you have to make sure members are actively engaged in grant decisions?
- Do you have a process for brainstorming or collectively deciding on innovation grants?
- Do you have a process for deciding on an annual area of focus for RFPs?