



Bar Foundation Best Practices: Grants Monitoring: Ensuring Impact

For many bar foundations, granting money to organizations that provide legal services to the most vulnerable individuals in our communities is the most rewarding aspect of the job. Generous gifts from bar foundations allow service providers to impact their missions while simultaneously impacting the foundations' missions. However, foundations have a legal and an ethical responsibility to their constituencies to accurately track grant monies and ensure that grantees are in compliance with grant requirements. Proactive grant monitoring policies and procedures assist foundations in doing just that.

Before creating grant monitoring procedures, foundations need to determine what they hope to gain from grant monitoring. For most foundations, grant monitoring serves the dual purposes of holding grantees (and foundations) accountable for the expenditure of public dollars and bolstering the case foundations make to the public about its purpose and impact. Foundations also will contemplate their particular target audiences (for example, major donors) to determine the data and stories they seek in grant reports.

Grant monitoring generally occurs through foundation procedures and grantee reporting. The procedures are provided to the grantees when they apply for and receive foundation grants. The grantees, in turn, provide reports to the foundation.

Tips from Bar Foundation Executives:

- Provide opportunities for foundation staff and Board to develop personal connections to current and potential grantees through site visits
- Go beyond providing grantees with a FAQ sheet: use the foundation's website and a grantee manual to provide information regarding the grant reporting process
- Compile information from grantee reports in a database that allows quantitative evaluation of grant impact over time
- Show grantees how the foundation uses and benefits from grant reports
- Maintain an active and personal relationship with grantees to encourage an open exchange of information, concerns, and questions.

For specific examples of monitoring procedures and reports, please visit NCBF's [NEW and IMPROVED](#) website. In particular, you can access samples from bar foundations nationwide at www.ncbf.org.

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Foundation Services

References:

ALPS Foundation Services, www.foundationsservices.com

American Bar Association, <http://www.abanet.org/>

Association of Fundraising Professionals, <http://www.afpnet.org/>

Chicago Bar Foundation, <http://www.chicagobarfoundation.org/>

Council on Foundations, <http://www.cof.org/>

Foundation Center, <http://foundationcenter.org/>

Massachusetts Bar Foundation, <http://www.massbarfoundation.org/>



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