



Women's Fund Research Process

The Women's Fund awards significant grants to organizations meeting the critical needs of women, children, and families living in south Santa Barbara County. Instead of accepting applications, the organization conducts its own research. Over the past 20 years, the Research Committee has developed a rigorous process for identifying and investigating the projects that are included on the ballot that is submitted to members.

The Research Committee consists of Women's Fund members willing to volunteer their time to intensive research. The **integrity** of the research process is a top priority for Women's Fund leadership. Researchers cannot be employed by a nonprofit that could be researched by the committee. They are permitted to serve on a nonprofit board but cannot be involved in researching that agency. Each year, researchers sign a Conflict of Interest and Confidentiality Agreement.

Soliciting Ideas for Grants

The Research Committee maintains a **database** that includes more than 150 community agencies whose programs serve women, children, and families. Women's Fund members can suggest agencies to be included in the database by sending an email to research@womensfundsb.org. In addition, members have an opportunity to recommend agencies as part of a bi-annual survey.

In the spring, the Research Committee reaches out to all agencies in the database asking if they have ideas for a project that will benefit women, children, and families in south Santa Barbara County. Interested agencies are asked to provide basic information and a brief project description—about 300 words. In 2023, nearly half the agencies in the database submitted ideas at this stage.

In July, a sub-committee ranks the ideas that have been submitted, and the entire Research Committee meets to discuss projects that will receive more intensive research. Those agencies are presented to the Women's Fund Board

for preliminary review. The agencies are asked to provide financial documents including a profit and loss statement, a balance sheet, an annual budget, and a recent IRS form. **The Finance Committee** reviews the materials to confirm that the agency is financially stable and able to responsibly manage a significant grant. The committee also confirms that the agencies comply with state and federal regulations governing nonprofits.

Inviting Agencies to Apply

Once an agency has been vetted by Finance, it is **assigned to a researcher** who contacts the executive director (ED). In a confidential phone call, the researcher explores the proposed idea in more detail and decides whether the agency should apply for a program grant, a capital grant, or gap funding that covers budget shortfalls.

The executive director is then invited to **submit a full application** which consists of three pages of questions and a project budget. Researchers work with the agency to create an application that clearly explains the need for the project and how the agency will make use of the grant.

After the application is submitted, the researcher continues to work with the ED to clarify any issues and **answer preliminary questions**. The researcher also visits the agency to meet the staff and get a glimpse of the program in action. After compiling all available information, the researcher prepares a research report which is shared with other members of the committee.

Evaluating, Deliberating, and Refining

The researcher then makes an **oral presentation to the Research Committee**; at this time, other researchers raise questions and provide feedback to strengthen the proposal. After the presentation, researchers can also attend a **virtual site visit** to listen to the ED summarize the proposal and ask questions. The questions and answers are summarized in a Q&A document which becomes part of the research file.

During the research process, some proposals are withdrawn for a variety of reasons. In December, the committee discusses the remaining projects to decide which ones should be **recommended for inclusion on the ballot** that will go to Women's Fund members for voting in March.

Throughout the research process, researchers consider the following criteria:

- Does the project meet a critical need in the community?
- Is the project likely to be effective and does the agency have a way of measuring effectiveness?
- Does the grant meet a critical financial need that can't be met in other ways?
- Can the agency leverage funds by coordinating with other agencies or by finding matching funds?
- Can the organization demonstrate leadership and program sustainability?

Voting and Awarding Grants

The Board reviews the Research Committee's recommendations in January and gives final **approval to the ballot**. With the help of the Communications Committee, the Research Committee creates the Ballot Information Package that is emailed to members in February. In March, members can attend the Ballot Review Meeting where researchers present each agency and answer questions from members. The voting deadline is at the end of March. Grants are awarded to the agencies that receive the most votes at the Celebration of Grants in May.

Agencies that receive grants are required to provide mid-year and [year-end reports](#) on how funds were used and what impact the grant had on the agency and its clients. The agencies also agree to participate in educational forums such as [Grants in Action](#) so members can learn more about how Women's Fund grants have made a difference.