

FOUR PAGE PDF FROM INSTITUTIONAL DONORS

The purpose of this document is to present the updated information about your foundation to potential grantees in the most streamlined way possible. Ideally, this is an efficient way for both parties to communicate key information.

Advantages for organizations

- *Ability to more efficiently review and analyze current foundation information to better evaluate fit before investing in an approach.*
- *Access more detailed, current information that is often unavailable on foundation websites and databases.*
- *Inclusion of the foundation's latest strategic updates, preferences, boundaries, and other often hard-to-say but relevant information that pertains specifically to institutional donors. Ideally this document helps act as a filter for good-fit partnerships.*

Advantages for foundations

- *Efficient way to inform interested organizations with the foundation's most current information.*
- *Quickly aligns expectations on the grant process.*
- *Inclusion of more nuanced information around leadership, Board role, and ethos enhances and expedites the ability to assess "good fit"*
- *Standardized format enhances ability to compare notes with other foundations*

Instructions for the organization filling this out:

- *Please respond to the prompts below.*
- *This document should not exceed 4 pages. Kindly keep your responses within the suggested number of sentences. Be brief!*
- *No photos or infographics. Please keep design to a minimum.*

DATE: February, 2024

HISTORY

1. **Who is/are the foundation's founder(s)?** Jim Ward
2. **In two sentences, why was it founded?** Jim created the foundation in 2018 to organize his financial support of initiatives in New Orleans and Guatemala. Jim is a lifelong resident of New Orleans but has a longstanding connection to Guatemala dating back to the 1976 earthquake.
3. **Mission statement:** Increase access to education for underserved people in New Orleans and Central America.
4. **Website:** www.thewardfoundation.org

FOUNDATION GENERAL INFORMATION (please restrict answers to 2-3 sentences per prompt)

1. **What are the foundation's main grantmaking areas?**
 - a. Guatemala: initiatives focused on smaller to mid-sized programs serving girls/women and/or education in the K-12 space.
 - b. New Orleans: education-focused organizations of small/mid size (less than \$1 million budget) that are focused on children and youth living within the city limits.
2. **Does the foundation support direct services, policy advocacy or other?** At present, the foundation supports organizations providing direct services in Guatemala and New Orleans. The foundation also supports several intermediary networks dedicated to coordinating the efforts of smaller organizations in Guatemala. In Guatemala, we are exploring ways of moving "upstream" with grantees to support advocacy efforts for education reform.
3. **Describe the population your foundation aims to serve? (age, gender, geography, challenge):**
 - a. Guatemala: The foundation focuses largely on girls/women, with a particular interest in Indigenous populations. Our "sweet spot" tends to be initiatives that serve this population with educational services.
 - b. New Orleans: The foundation currently supports initiatives providing innovative education-focused services to underserved children and youth.
4. **Share three of your foundation's strengths:**
 - a. Flexible/Learning- the Ward Foundation aspires to be flexible to meet the needs of its partner organizations as we learn together. We aim to provide more than funding by providing technical support (when relevant) and connections.
 - b. Trust-based partnerships- We subscribe to the tenets of [Trust-Based Philanthropy](#), which allows us to engage in positive, honest relationships.
 - c. Empathy- The Ward Foundation staff has spent many years in the role of fundraising and project implementation.
5. **Share three of your foundation's challenges:**
 1. Size: one of our weaknesses is that the Ward Foundation is not large. We distribute around \$1 million per year between New Orleans and Guatemala (about 20% NOLA and 80% GT). This limits our ability to provide more significant gifts. We also have just one full-time staff person.

2. Inexperience: The foundation is only 5 years old, and we really only have 2-3 years of active engagement in grantmaking. We are therefore still defining our areas of focus and the best ways to serve our partners.
3. We are not a well-recognized foundation. We aspire to help challenge and move some of the more traditional philanthropic practices, but as a new foundation, we lack name recognition and clout in the foundation space.

GRANTMAKING INFORMATION

1. **Please describe how to your foundation sources potential grantees:**
 - a. References from existing grantees and like-focused foundations.
 - b. We monitor relevant networks of organizations within our areas of focus.
 - c. The inquiry page on our website.
2. **If your foundation extends invitations to apply, what is the best way for an organization to reach out to explore an invitation?** Use the contact form on our bilingual website: <https://www.thewardfoundation.org/copy-of-ethos>
3. **Please share important dates related to your grant cycle:** We have two grant cycles each year (spring and fall).
4. **How many grant applications do you typically receive each year?** To avoid wasting the time of interested organizations, we aspire to connect with potential partners before the application process to explore fit. For that reason, we receive minimal applications for new funding (less than 5 new applicants per year).
5. **How many organizations receive grants each year?** For New Orleans, we fund between 5-8 entities each year. In Guatemala, the number of active partners is between 15-18 organizations.
6. **Does your foundation provide restricted or unrestricted funding (or both)?** The vast majority of our grants are unrestricted.
7. **Does your foundation provide multi-year grants?** The Ward Foundation currently provides one-year, renewable grants. We strive to make sure to inform current grantees well in advance of any plans to sunset their funding.
8. **Does your foundation provide funding for operations, for capital projects, or both?** The foundation has a limited amount each year to support the capital projects of existing or previous grantees. The vast majority of the grants are unrestricted.
9. **What are your foundation's eligibility requirements?** Currently, the Ward Foundation only grants to entities with a US 501c3 or US fiscal sponsor. We also prefer to fund entities in Guatemala that also have legal recognition.
10. **Does your foundation receive inquiries, proposals, etc in languages other than English?** Yes, in addition to English, we can field any communications in Spanish.
11. **When you decline LOIs or proposals, is there an opportunity for organizations to receive feedback?** Yes, though we try to clarify any misalignment well before the proposal process.

HUMAN RESOURCES (please restrict answers to 2-3 sentences per prompt)

1. **Number of staff:** 1 FT (based in Guatemala) and 1 PT (based in New Orleans)
2. **Number of staff based outside the US:** 1FT
3. **Geographic base of your foundation:** New Orleans
4. **Gender breakdown of staff:** The 1.5 staff are both male
5. **Gender breakdown of leadership staff:** 50% of the Foundation Board is female
6. **Describe the leadership philosophy of the foundation:** The founder, 96-year old Jim Ward, is engaged with the foundation's work at a high level. The foundation staff aspire to interpret Jim's vision and values when seeking out, creating, and sustaining partnerships.
7. **Describe the composition and role of the Board of Directors of the organization:** As a newer family foundation, the BOD is small (6 members) that draws largely from Jim's family.

FINANCIAL:

1. **Annual budget for grantmaking (please specify the year):** Approx \$1.1 million (2023)
2. **What is the average size and range of your grants?** Average size is around \$15,000 in Guatemala, with a range of \$10,000 to \$100,000. In New Orleans the average is \$20,000 and the range is \$20,000-\$30,000.

CULTURE: (please restrict answers to 2-3 sentences per prompt)

1. **Share up to three aspects of your foundation's culture that organizations should know about:**
 - a. We are in our discovery phase and a growth mindset. As a new foundation, we are not set in our ways with rigid guidelines.
 - b. Prior to joining the foundation, the program staff of the foundation spent decades as a fundraiser. We strive to integrate empathy into all of our decision-making.
 - c. We aspire to view the foundation's decision-making through the lens of the founder, Jim. His values include: integrity, justice, hard work, and win-win scenarios.
2. **Share up to three aspects of your foundation's decision-making process that organizations should know about:**
 - a. The foundation's assets fluctuate and are not always liquid. The funds come from real estate and stocks, both of which change. For this reason, making multi-year commitments is currently difficult for us.
 - b. Our goal is to limit/eliminate unnecessary work for grantseekers. We will only invite you to apply if you have a high probability of approval.
 - c. We are not a big foundation and there is minimal bureaucracy. At this point, we are still able to be very responsive to inquiries and requests for conversations from potential grantees.

GRANTEE ENGAGEMENT:

1. **Please list up to three characteristics of your "ideal funding partnership"**
 - a. The Ward Foundation aspires to foster spaces of collaboration among grantees. We look for evidence of proactive collaboration when seeking out partners.

- b. The majority of the foundation's funding goes towards smaller to mid-sized organizations (usually less than \$1 million annual budget) that are in intensive phases of growth.
 - c. The foundation seeks to support organizations with leadership that is proximate to the cause it aspires to address. We shy away from organizations with large, distant leadership offices and instead prefer in-country/local executive leadership.
- 2. Please list up to three deal breakers when it comes to evaluating potential grantee partnerships:**
- a. The foundation has a strong aversion to organizations with elements of rescue/hero white saviorism. This is evidenced through donor-centric programs like child sponsorships or unskilled voluntourism for service provision.
 - b. The foundation has no religious affiliation and avoids programs with any overt religious connotations.
 - c. The foundation avoids large organizations where our financial support is not clearly needed.
- 3. In one statement, what should potential grantees know about your grant selection process?**
- a. To save time, please talk to us before writing up any formal documents.
- 4. Describe one of your grantmaking challenges (2-3 sentences):**
- a. As a new foundation, we are still exploring how we can best support our grantees and the general landscape of philanthropy.

Optional additional information

- 5. Optional: Please list current grantees (specify which year):**
- a. 2023 Guatemala: MAIA Guatemala, Maya Health Alliance, Women's Justice Initiative, Wings, Limitless Horizons Ixil, Antigua International School, Creamos, Planting Seeds, Guatemala Youth Initiative, Sueños, Peronia Adolescente, Atlas, Teach for Guatemala, She's the First/Ellas al Fente initiative, RECARGA, El Colectivo, El Directorio Guatemala, RECARGA.
 - b. 2023 New Orleans: Live Oak Camp, 18th Ward, Bard Early College, UnCommon Construction.
- 6. Optional: Please list 1-3 grantee references (past or current)**
- a. Creamos Guatemala (current)
 - b. MAIA Guatemala (current)
 - c. Live Oak Camp New Orleans (current)
- 7. Optional: Please provide 3 links to additional resources (webpages, articles, videos, etc.) that you would like potential grantees to view.**
- a. Philosophy on hero-victim dynamic: <https://www.weareforgood.com/episode/142>
 - b. Trust-based philanthropy: <https://www.trustbasedphilanthropy.org/>
 - c. [Foundation archetypes](#) (we identify as Venture Catalysis and Designers)

Contact information (name, position, and email address for key point person managing institutional funding)

Travis Ning
 Program Manager
travis@thewardfoundation.org