

**Robert Sterling Clark Foundation
Check-in Assessment Tool (CHAT) – Existing Grantees**

Draft email language

Dear _____,

Thank you for setting aside time for our upcoming check-in scheduled for _____.

Attached please find the questions we'd like to discuss with you.

The purpose of the CHATs is to learn about and support you in your leadership development work while also assessing our grantmaking effectiveness. For all grantees, we're asking a common set of questions, and then analyzing trends we hear across grantees. This helps us support you better and consider where we might make improvements in our grantmaking.

Feel free to review the questions in advance or not. We are sharing them out of a desire to be transparent, not create pressure on you to do advance thinking. Please don't prepare responses in writing – or any special reports or presentations.

If you're okay with it, we'd like to record the meeting. We're happy to share the transcript with you and it will otherwise remain confidential among the foundation staff and its evaluation team. This way we aren't worried about taking notes and it will enable our evaluator to look across our CHATs for trends that can help us be a better funder.

We expect the CHAT to take about two hours in total to accommodate our questions as well as anything else you'd like to bring up. Feel free to be in touch if you'd like to discuss anything in advance.

[ending]

Introduction

Thank you for meeting with us today. The purpose of these CHATs is to learn about and support you in your work while also assessing our grantmaking effectiveness.

Trying to do our work better and partner better is really important to us. Hearing from you directly helps us do just that.

In case “what we do” is not clear – our foundation is committed to helping create a vibrant, equitable New York City. We do that in two primary ways: 1) by investing in NYC social change leadership development programs that cultivate diverse leaders; and 2) by funding organizations that build the field of leadership development (via research, developing models, and experimenting with approaches). We also seek to influence equitable practices across the philanthropic sector. This happens mainly by joining funder collaboratives that explore how foundations can better engender trust with grantees and better address race equity within grantmaking. That’s enough on us – unless you have questions!

We’ll be starting with a few guiding questions but please jump in. We’d like this to be a conversation. We expect the CHAT will take about two hours.

We would like to record the conversation so that we can reflect on it later. Is that OK with you?

Do you have questions before we begin?

One last thing to mention: We have collaboration grant funds available if you’re interested in working together with other grantees. Happy to share more on that as part of this CHAT!

Check-in Questions

1. Are there any big developments in your organization overall that you want to talk about? Are you wrestling with any big strategic questions?
2. How does your organization assess its performance? What does your Board care most about when it comes to assessing organizational performance?
3. What changes, if any, have you made to your leadership work that you think we should know about?
4. How did the funding, especially the fact that it was flexible, affect your organizational health?
5. Have you had a chance yet to learn from other nonprofits convened by RSCF? What have you learned and how has that been helpful to your organization? Any advice about how to better cultivate learning among grantees?

6. Having healthy relationships with grantees is really important to us. Any advice for us about what we could do to continue to cultivate that with you and your organization? What's most helpful and least helpful about our process, the way we communicate, anything else that comes to mind?
7. Are there any additional resources or opportunities we could be offering to support your organizational health and leadership programming?
8. Are there additional groups we should be considering that do leadership development work?
9. One of our core values is equity – racial and otherwise. We're trying to embed equity more squarely into our practice. We're curious – how do you see your leadership work as equity work? Do you have any advice for us on how to better practice equity as a foundation?

Thank you very much for your time!