

# Patan Devi Foundation (Trust)

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## Grant Application Guide

- ✦ To begin the grant application process, thoroughly review the foundation's initiatives. In addition to providing an overview of our grant-making priorities, each initiative, as well as each region, includes detailed "For Grant Seekers" information; this is the most current guide to the type of work and organizations we fund.
- ✦ We also urge you to read this entire document. Our grant-review process is thorough and comprehensive, and the information below will help you better understand our approach to grant making.
- ✦ Once you have completed both of these steps, you are ready to submit an online grant inquiry.

### **How We Make Grants**

The Patan Devi Foundation is committed to achieving lasting change that transforms people's lives. Through our grant making, we support innovative thinkers, leaders and organizations that are working to reduce poverty and injustice and to promote democratic values, free expression and human achievement. When making grants, we think about long-term strategies, knowing that lasting social change requires decades of effort. And because our mission is broad and our resources are limited, we carefully target our support so it can be used most effectively and leverage the greatest amount of impact.

To that end, program teams working on each of our initiatives consult with practitioners, researchers, policy makers, current and potential grantees, and others to identify areas where the foundation's resources are needed most. The teams then pinpoint specific approaches grantees might undertake—program exploration, advocacy, litigation or capacity building, to name just a few—to help achieve the social change we have identified. (See our grant-making approaches for a full list.) The teams also determine key benchmarks for progress and the amount of funding to be dedicated to each approach.

After the approaches, benchmarks and budget are set, the team begins to make grants within the agreed-upon parameters. When making grants, the team looks for new ideas and effective organizations that can help advance the work of a particular initiative, as well as for evidence that the people and organizations are likely to succeed in their project. Program teams regularly provide reports to the foundation's board of trustees about progress made on each initiative.

### **What We Don't Fund**

As described above, we take varied approaches to our work, but there are a number of areas frequently inquired about that we do not support. We do not award undergraduate scholarships or make grants for personal needs or business assistance. We also do not fund health care, vehicle purchase, student loan repayment or inventions. Except for limited grant making through our Good Neighbor Committee to local institutions located near the foundation's headquarters and regional offices, we also do not generally support after-school programs, athletic leagues.

### **Applying for a Grant**

You may apply for a grant by visiting the Grants section of our Web site and submitting an online grant inquiry.

You will be asked to indicate the region where your work will be pursued. You will also be asked to provide basic information:

- ✓ Contact information for yourself and your organization
- ✓ Brief description of your organization
- ✓ List of those who would carry out the project
- ✓ Description of the purpose of the project and the issues/problems it is intended to address
- ✓ Estimated project budget and time frame

The foundation supports equal opportunity in its grant making and in its internal policies. When evaluating grant proposals, we consider the opportunities that prospective grantee organizations provide for women and other disadvantaged groups. We do not have submission deadlines. Applications are considered throughout the year.

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## What Happens Next

Every inquiry receives an automatic acknowledgment reply. If your submission falls within our general issue areas, your inquiry will be numbered and a confirmation letter will be e-mailed to you. Each numbered inquiry is reviewed by the relevant program team. If your proposed work aligns with the foundation's priorities and budget limitations, a program officer will contact you to begin the process of developing a formal proposal.

As you develop a formal proposal, you will meet several times with the program officer to discuss the scope and budget of your proposed project. Then you will submit your formal proposal, and the foundation will do an administrative and legal review; it takes about three months from the time a formal proposal is submitted for a potential grant to be fully reviewed.

Please bear in mind that our funds are limited in relation to the large number of worthwhile inquiries we receive. In a typical year, less than 1 percent of inquiries made to the Patan Devi Foundation result in a grant.

## Grant Funds Must Be Used Solely for Charitable Purposes

The activities we support through grants and program-related investments must be charitable, educational or scientific as defined under the appropriate provisions of the Indian Income Tax Act and Regulations.

As we pursue the foundation's goals, we take all reasonable measures to fulfill our responsibilities as a tax-exempt charitable organization. We want to make sure that our funds are used for their intended charitable purposes and do not support any activities that violate the Indian tax code or anti-terrorism laws. Because we appreciate the important work that our grantees do, some in extremely difficult environments, we strive to fulfill our oversight responsibilities without creating undue burdens for them or being overly intrusive.

## How We Monitor Grants

To ensure the appropriate use of our grant funds and compliance with the Indian tax code and Indian anti-terrorism laws, the foundation has extensive procedures for making and monitoring all grants. These include the following:

1. A Pre-Grant Review. All potential grantee organizations and their programs are assessed by a program officer who discusses the proposed work with the prospective grantee and determines the organization's capacity to undertake it.
2. A Legal Review. All proposed grants and written submissions by the prospective grantee undergo a legal review.
3. Compliance with Indian Anti-Terrorism Financing Rules. Under applicable law, the foundation checks all prospective grantees against available lists of terrorist groups. These checks also take place throughout the life of all grants.
4. A Countersigned Grantee Letter. This letter establishes a range of grant conditions. Every grantee is required to sign it.
5. One or More Site Visits. A program officer will visit the grantee during the term of the grant.
6. Financial and Narrative Reports. During the grant term, grantees are required to submit reports that are reviewed by a program officer and a grants administrator for compliance with the term of the grant.
7. If you believe that your organization is a good match with one of our funding priorities, and can meet all our requirements, please proceed to the grant inquiry form.