



Sample Grantee Journeys

Sample Journey One

We met Organization A in the summer of 2021. We had 3 meetings in the fall of 2021. We brought a grant concept to our team in January 2022. After conducting due diligence, the team was enthusiastic and agreed to move forward to a full grant proposal. The Siegel team wrote the grant proposal in consultation with the grantee over the course of 5 weeks. The grant was presented and approved at the March 2022 board meeting.

Sample Journey Two

We met Organization B in the fall of 2020. We had a series of meetings between fall and spring 2021. We brought a grant concept to our team in April 2021. The team had a number of questions about the concept, which we took back to the grantee. We worked with the grantee during late spring and summer of 2021 to flesh out the concept and ensure alignment with both of our core missions. We then brought a revised grant concept to our team in August of 2021. The team felt the revised concept was more aligned with our core strategy, and agreed to move ahead to a full grant proposal. The proposal took 3 weeks to complete, and was presented and approved at the October 2021 board meeting.

Sample Journey Three

We met Organization C in the spring of 2021. Various members of both our Grantmaking and Research teams met with Org C over the course of about eight months in order to explore one another's work and shared interests. However, we were not able to find a grant concept that made sense for our internal discussion, and to date, have not presented our team with a grant concept for Org C. We remain in one another's orbits, sharing resources and potential partnerships, and attending events together. We value being able to build relationships and learn together.

Sample Journey Four

We met Organization D in the fall of 2019. We had a series of meetings (and even a site visit, since it was 2019!) over the course of about 14 months. We presented a grant concept to our team in early 2021. However, based on the state of our strategy and an assessment of the organization's capacity, our team determined that it did not make sense to fund the work at this time. We communicated this to Org D shortly after the meeting. We remain open for conversation and future grant concepts, though none are in active pursuit at this time.



Sample Journey Five

We met Organization E in the summer of 2022. We reviewed the organization's background materials and website, and met shortly thereafter to discuss alignment. However, we decided that their work, while important for their field, was outside the scope of our own strategy and declined to move forward with future meetings.