SHAVLIK FAMILY FOUNDATION
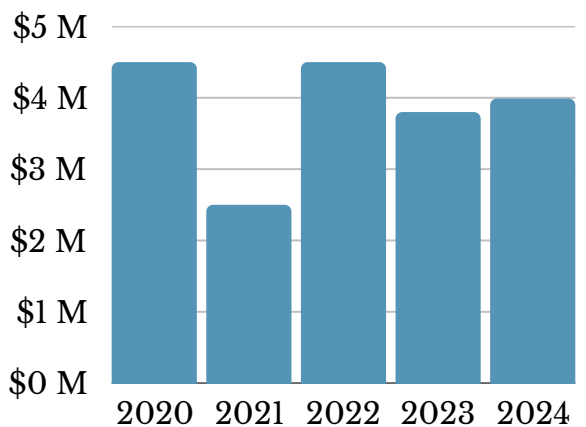
2024 Annual Report

The Shavlik Family Foundation strives to continually improve our grantmaking process and strengthen our internal operations to better serve the Minnesota nonprofit community.
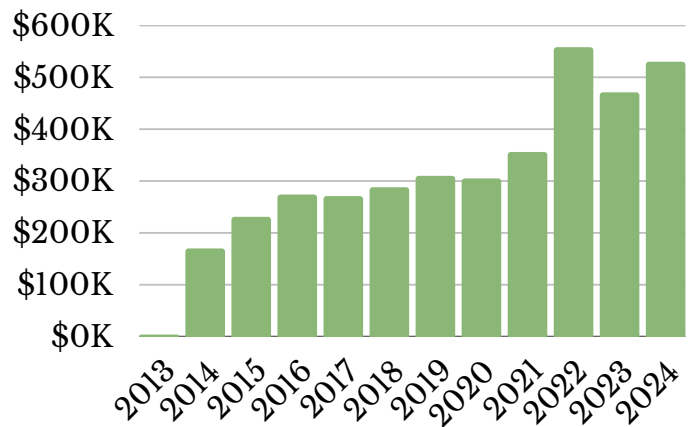
In 2022, we moved to a 2-cycle annual grant calendar to better align our funding opportunities with applicant calendars and increase our funding disbursement. In 2023, we committed to increasing our endowment distribution rate with the goal of sunsetting The Foundation over the next decade and support more nonprofits each grant cycle.

In 2024, we sought to build on both of these changes. We recognized that we had room to improve our funding success rate, and better understand how we make funding decisions and where our biases may exist. We transitioned to a new grant management software which offers better data access, particularly in pulling and arranging detailed reports spanning across grant cycles, which will help us understand trends and make data-informed decisions in the future. With these goals defined and tools implemented, 2024 marked a year of increased giving, analyzing core program data, strengthening our review process, and recommitting to the applicant experience at The Foundation.

Looking forward, we want to continue building on a program that is already working, and that we know fills a gap for Minnesota nonprofits.

TOTAL DOLLARS REQUESTED BY YEAR
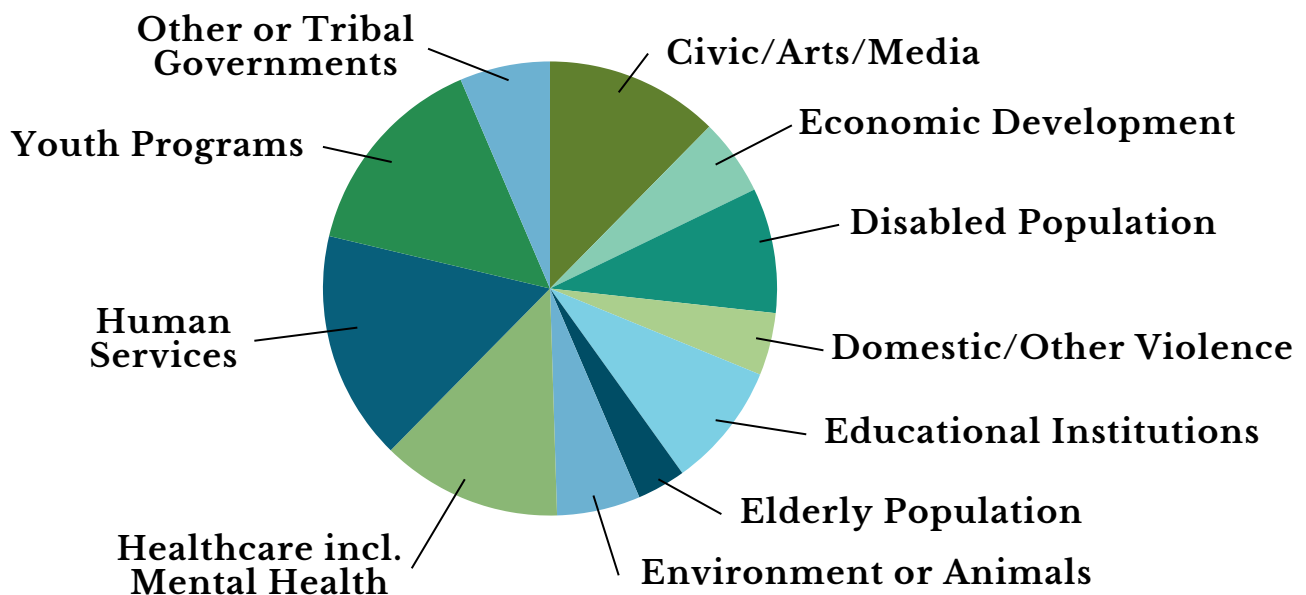

TOTAL DOLLARS AWARDED ALL TIME

FUNDING BY MISSION

We accept proposals from any mission area, and work to balance funding in varying missions, geographic areas, and organization sizes. Overall, the proportion of applications we receive closely matches the percentages of projects we fund in each mission area.

In cases where funding percentages exceed or are less than application percentages, the type of technology requests are often the factor. For example, larger organizations often ask us to be a part of projects or implementations where our grant is only part of the capital being raised and our impact smaller, when for the same amount of funding we might have a more significant impact on a smaller project/organization.

However, our goal continues to be to fund as many mission areas as we can each grant cycle with an emphasis on unique programs that can fill gaps in each nonprofit sector.
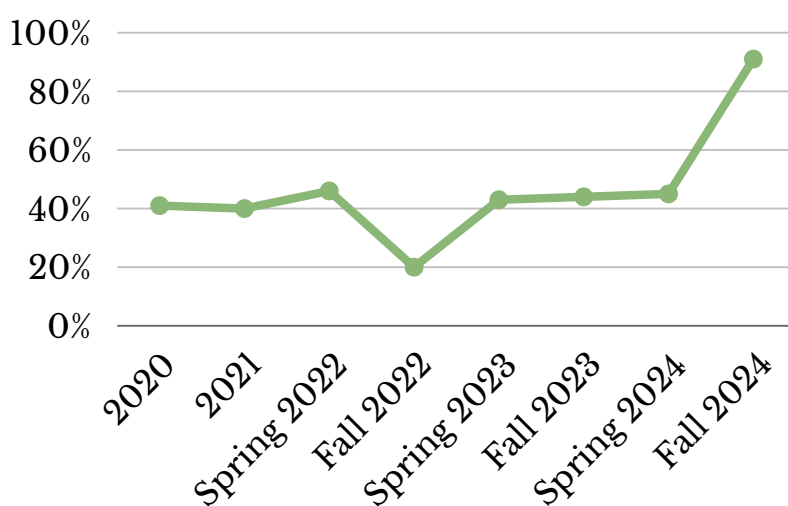
203 PROPOSALS AWARDED ALL TIME

Pie chart labels: Other or Tribal Governments, Civic/Arts/Media, Economic Development, Disabled Population, Youth Programs, Domestic/Other Violence, Educational Institutions, Human Services, Elderly Population, Environment or Animals, Healthcare incl. Mental Health

IMPROVING APPLICANT SUCCESS RATE

All grantmaking foundations recognize they are inundated with more requests for funding than they have the ability to support. However, this bottleneck is exacerbated for our foundation because we accept proposals from any nonprofit based in Minnesota, with any mission focus, seeking technology- a cost that rarely qualifies for other funding sources. Having a smaller annual budget for grantmaking with a large volume of applications has meant a common critique we receive is that there is a high likelihood of being rejected after a nonprofit has put time and energy into an intensive application process.

In an effort to reduce this barrier, we moved to a two-step process in 2020: an open LOI stage with a shorter, simpler form, and invite-only Full Application stage requiring more detailed information. This change, while an improvement, was still resulting in less than a 50% success rate of funding for the Full Applications. In 2024, we worked to address this by decreasing the number of LOI proposals invited to submit a Full Application while increasing our grant budget. Our goal is to sustain no less than a 70% funding success rate at the Full Application stage, achieving better alignment with other peer Foundations. We piloted this process in our Fall 2024 grant cycle and went from 49% success rate or less to over 90% without sacrificing our open process.

*Note the discrepancy in Fall 2022, the first time we piloted a second grant cycle in a single fiscal year.
Due to a tight timeline, we eliminated the two step process, which prevented us from controlling the number of Full Applications received.*
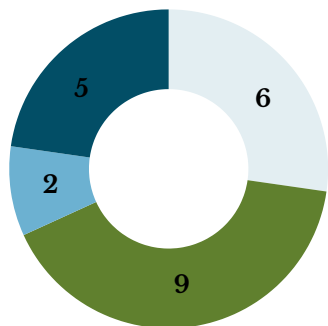
**SUCCESS RATE BY YEAR
(FULL APPLICATIONS THAT WERE FUNDED)**

2024 GRANTMAKING

Below is a brief overview on the projects funded during our 2024 grant cycles. The patterns we have seen emerge from previous years continue in 2024: we fund primarily small-to-midsized nonprofits, maintain a 35% minimum of funding going towards projects outside the 7-county Twin Cities metro area, prioritize funding in a variety of mission areas, and the vast majority of grants awarded are for our maximum $30k budget.
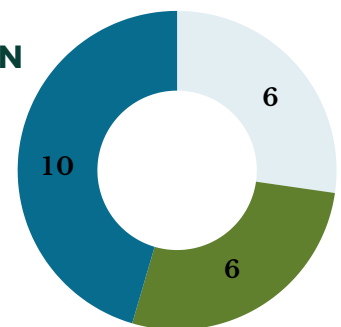
ORG. ANNUAL BUDGET

- Less than $1M
- $1M - $4.9M
- $5M - $9.9M
- Greater than $10M

6
5
2
9

ALL ORGS FUNDED IN 2024 (22 TOTAL)
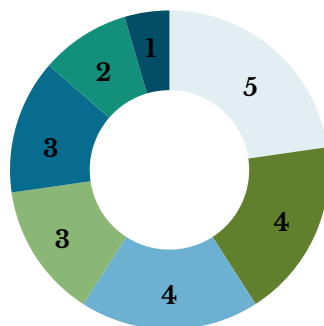
GEOGRAPHIC DISTRIBUTION

- Greater MN
- Statewide
- TC Metro

6
10
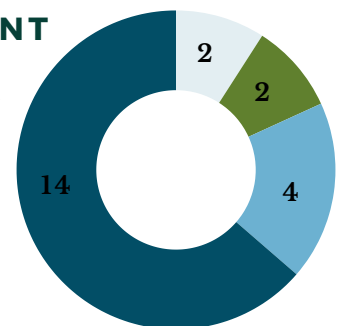6

ALL ORGS FUNDED IN 2024 (22 TOTAL)

MISSION AREA

- Civic Orgs.
- Economic Devel.
- Education
- Environment
- Health Related
- Human Services
- Youth Programs

5
4
4
3
3
2
1

ALL ORGS FUNDED IN 2024 (22 TOTAL)

GRANT AMOUNT

- Less than $10K
- $10K-$19.9K
- $20K-$29.9K
- $30K

2
2
4
14

ALL ORGS FUNDED IN 2024 (22 TOTAL)

Shavlik
Family Foundation

4661 White Bear Pkwy
White Bear Lake, MN 55110

Learn more at:
shavlikfamilyfoundation.org