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Change Up Your Questions

*Exploring and Shaping What You Ask Grantees
and How You Ask Them*

Marshall H. Ginn, Capital Philanthropy, February 2024

Learning Objectives

1. Reinforce the important role that questions have in the grantmaking process
2. Understand ways you can review and adjust questions based on changing times, evolutions in the sector, and your needs as a funder
3. Encourage you to incorporate routine reflection into your work, make sure questions are supporting the process and doing so in an equitable manner
4. Consider possible approaches by looking at real-world examples of questions from actual grant applications

Origin of the Idea

- AIM For Excellence Award (formerly *The Washington Post Award for Excellence in Nonprofit Management*)
 - Sector was evolving, but questions were behind
 - Organizations exhibiting distinctive characteristics, but questions weren't targeting those qualities
 - Sector was changing; but a challenge to effectively adapt questions to match changes
- What was "excellent" and what was "competent" was shifting
- We needed to CHANGE UP OUR QUESTIONS!



Questions Are Your Tools

In a keynote two weeks ago at the Community Foundation of Northern Virginia's annual *Shape of the Region* meeting, frequent PBS News Hour guest, interviewer, and author **David Brooks** spoke about the "quality of your questions." He urged us to "Ask big questions that provide big answers."

APPLICATIONS & CONVERSATIONS

- They are integral components of your application as well as the conversations you have with current & potential grantees
- It's important to focus attention here

RELEVANCE IS KEY

- Ongoing shifts in the sector, the community, and philanthropy require you to assess the impact of those changes on the questions you ask and how you ask them
- It's important to be current

QUESTIONS CAN BE HARD TO UNDERSTAND

- Many who write/create grant applications are surprised to learn how difficult it can be for nonprofits to understand and respond to questions
- It's important to be clear

Your Questions Should Reflect Your Values & Should Respect the Values of Others

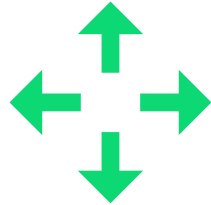
- **Could someone tell** – just by reading your application – what your values are as a funder?
- Have you **intentionally focused on your values** as a funder? Identified what those values are, explored how you articulate them?
- **Understand different views and perceptions** – Don't assume everyone will make the connection, even if you think you've been clear about your values
- **Different backgrounds and languages** – Applicants may have various levels of educational experience, knowledge, language facility, or perspective; responding to questions filled with jargon or highly technical phrases may be a significant challenge

What does “Change Up Your Questions” mean?



Add elements or dimensions

Clarify your goals or encourage more precise responses



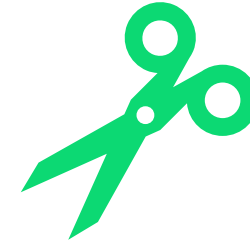
Make small changes

Tweak the language a little or edit the questions into a simpler format



Rewrite the whole thing

If it's information you need, but the question feels outdated or inconsistent with the times, start from scratch and rewrite it



Take it out

Cover it during a conversation instead of the application. Streamline your process!

What would you do? Developing useful questions

- You want to learn how an organization plans its programs or makes decisions regarding programs or services.

Which question might you use?

- A. *"Please describe your Theory of Change and how it impacts the overall structure of your programmatic decisions and measurement of outcomes."*
- B. *"Do you use any sort of framework or set of guidelines when you make decisions about your program? Tell us about those."*
- C. *"How does your organization decide whether or not it should do a particular program?"*
- D. Something else.

What would you do? Keeping the playing field level

- Your board is reviewing an application from a nonprofit for renewed funding. A trustee says, *"I heard that the organization just won an award as a "Best Place to Work" in our area. Let's go ahead and renew their funding."*
- There's no mention of this in their application, nor is there a question in the application that asks about such things. This hasn't come up in the discussions regarding other applicants.

What would you do?

- A. Don't worry about it, it's a renewal application anyway.
- B. This has happened before, consider creating a question that allows applicants to share stories of recent awards/accolades.
- C. Suggest a future policy -- If it's not in the application materials (or wasn't raised during a conversation with a program officer) it shouldn't get considered.
- D. Something else.

Using Questions Effectively - If you ask for it – Use it!

TRIM OUT “RELIC” OR LEGACY QUESTIONS

- *“We’ve always asked that”* type of questions can linger on an application, long after you stopped using that information

EFFICIENCY IS THE GOAL

- Gather information you need to make a funding decision; anything else potentially clogs up your process and makes extra work for nonprofits
- They are likely answering versions of the very same questions for other funders

YOU CAN ALWAYS GO BACK

- If you find something is missing, and it’s hindering the decision-making process, you can always go back to an organization and inquire further

What would you do? An actual question from a grant application

- *Does this project or program address any of our funding priorities? If so, please share details here. (Optional)*

What would you do?

- A. Leave it, make it a required response.
- B. Delete the question entirely (The nonprofit should have researched the priorities and not submitted a proposal if it didn't align.)
- C. Change the question: *"Share how this program or program aligns with one or more of our funding priorities."*
- D. Something else.

What would you do? An actual set of questions from a grant application

- *Briefly describe the proposed program, how it relates to the organization's mission, capacity to carry out the program and who will benefit from the program.*
- *Explain the significance of the program and why the organization is qualified to carry it out.*
- *Describe the expected outcomes and the indicators of those outcomes.*
- *Document the size and characteristics of the population to be served by the program.*
- *Outline the strategy and timeline to be used in the development and implementation of the program.*
- *What is the plan to involve the population you intend to serve in the design of the program?*
- *How does this program enhance the existing services in the community?*
- *Project evaluation - describe results expected by end of the funding period as well as the evaluation process you will use to assess it. Describe also the criteria for success.*

What would you do?

- A. Review the questions; see if some can be combined/simplified.
- B. Leave the questions, these are important topics.
- C. Identify whether some can be more easily covered through conversations with the organization during the process; remove them from this list.
- D. Some sort of combination of A and C.
- E. Something else.

Using Questions Effectively – Identifying critical factors that are important to you

“Technical” factors

- More “check box” type of things
- If it’s important to the process, track the information; don’t guess.
- Compile these into a “cover sheet” and attach it to review summaries.
 - Make sure reviewers know what questions provide the answer to those critical factors

“Idealistic” factors


- The nonprofit’s approach to involving their constituents
- How they treat, support, or train their staff
- Recognition the organization might have received

Using Questions Effectively – Exploring more complex topics or issues

Questions can provide useful insight

- Are there characteristics that are critical for your partners to have?
- What does the organization do when it faces adversity? Or how does it leverage a huge opportunity?
- Does the organization have a set of values? Are they similar or in alignment with your values?
- Do your best partners share common traits? Can you ask questions that gets at those traits?

Think of the responses that questions focused on these issues might produce!



Questions? Thoughts?

Before moving on... what do you think?

An Example of This in Action

- In the AIM for Excellence Award – After analyzing responses from nonprofits - “excellent” organizations were exhibiting consistent traits.
- These nonprofits not only focused on delivering their services, but also on being part of a “movement”. They were eager to share their knowledge and advance their field.
- But there was no question that targeted this more directly.

We developed the following questions:

- *“What does your organization do to engender trust in the nonprofit sector?”*
- *“Describe the ways that your organization demonstrates leadership in the nonprofit sector.”*

Framework: Is this important to us as a funder?

Is this a critical factor?

Will discussions about this topic be central to our decision-making process?

Do we ask a question?

Is there a specific question about this topic in the application? Or is this explored by staff and clearly recorded?

Is this used for all?

Is this question asked of or is this topic explored with ALL applicants, both new and renewals?

What would you do? An actual question from a grant application

- *What are the potential impacts of this project? Approximately how many people will this program or project impact?*

What would you do?

- A. Leave it, it seems fine.
- B. Take out "how many people," leave the first part.
- C. Change the second part, "Tell us about the people who will be impacted by this program or project."
- D. Something else.

Framework: Have we taken a good look at it?

Is this question or topic new?

Have we considered the many ways it could be received or interpreted by a nonprofit?

What about interpretation?

Are we prepared to assist a nonprofit who might interpret this question differently than anticipated?

What will we learn?

Are we ready to review the responses to this new question over time to assess its impact on our decision-making?

Example of this in Action

- *“Describe how your organization supports the well-being, health, or professional development of its employees (all employees, not just management) and volunteers.”*

- A new question for 2023; emerged from conversations held with grantee partners during roundtable discussions.
- Foundation executive needed to reach out and “explain” why this question was important.
- Primarily designed to explore how organizations were addressing issues such as employee burnout.
- Analysis of responses shows more focus on professional development and training; few organizations undertaking specific initiatives to care for staff’s emotional health.

Learn As You Go

- This is a cycle of reviewing, changing, listening, adjusting, and listening some more
- Build this into your ongoing workflow
- Promote learning as a sustaining value

Implement & Monitor

Try making a change then monitor (and track) the impact it makes

Ask for & Respond to Feedback

Use grantee engagement to explore the impact of new questions

Take the Time & Be Intentional

Be intentional about reviewing the responses to new/edited questions to see if there are any surprises

Check In

At the end of review meetings, ask yourself, "Did we have what we needed to make good decisions about our giving?"

What would you do? Creating questions that “explore”

- You want to explore how an organization approaches things like learning, overcoming challenges, building effectively on successes, or sharing knowledge. Think of questions you might add to your application or topics you might have a program officer explore in conversations.

What do you think of these questions?

- *“Tell us about your history in sustaining new initiatives.”*
- *“In the past, when something hasn’t gone according to plan, how have you approached and learned from such situations?”*
- *“How will you share the impact of this project? Do you expect to create specific outputs such as reports, briefings, or blog posts? How might this work impact the wider field in which you operate?”*
- *“What is the engagement level of your board of directors in your organization? In this particular project?”*

What would you do? Creating questions that “explore”

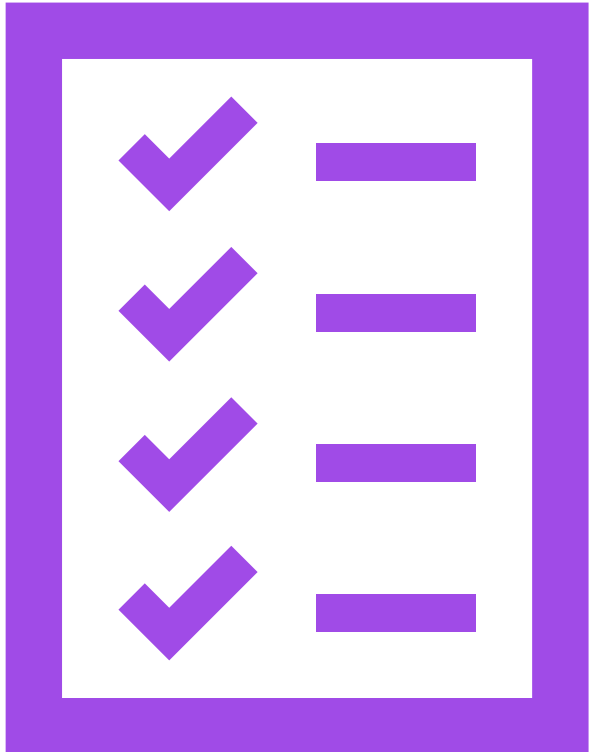
- It is important to you that you work with and fund organizations that have a good sense of their place in their ecosystem, and that they understand how their work compares with that of other organizations.

What question might you use?

- “How is your organization uniquely positioned to address this problem effectively?”*
- “What other nonprofits are operating in your ecosystem? How does your approach or your initiatives compare to those other organizations?”*
- “Distinguish yourselves!”*
- “Why are you the right organization to address this problem? And why are we the right funder to support that work?”*

Additional questions or
comments?

Recap



- Questions are your tools
- Questions should reflect your values
- “Changing” a question can mean several things
- Use your questions effectively
 - If you ask it, use it
 - Focus on critical factors
 - Exploring
- Frameworks – Is this important? Have we taken a good look?
- Learning as an ongoing value

Your Charge



- Use something you heard today to adjust your grantmaking, even small moves can make a big difference
- Share something you heard today with a colleague, friend, your dog... Anyone! Just don't keep it to yourself
- Post your thoughts on a blog or social media, keep the conversation going
- Leverage the time you've spent today by considering how you might change up your own questions

TODAY'S LEADER



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Thank you

