



Change Up Your Questions

Align Your Grantmaking Process with Your
Values and Vision

September 28, 2018

Presenter

- Marshall H. Ginn, CFRE
 - Founder of Capital Development Strategies in Arlington, VA
 - Former Vice Chair for Annual Giving at the AFP Foundation for Philanthropy
 - Former Selection Committee Chair of The Washington Post Award for Excellence in Nonprofit Management (now known as the AIM for Excellence Award)
 - Sr. Director of Development, Virginia Hospital Center Foundation





Outline for Today

- Reflecting on your guiding purpose and your values as a funder
- Review basic principles and steps for aligning values to practice
- Opportunity to put this into action – group exercise
- Sharing thoughts and inspirations

First – A Story and an Idea

IDEA:

- A. Any funder can explore their values then design (or redesign) questions with those in mind
- B. Funders can then reflect on emerging principles and best practices, which can lead funders to reshape, revise or refine the decision-making process.



Identify and Reflect

- What is your guiding **purpose**?
- What are your **values** as a funder?
- What are your **goals**?
 - *Think about those for a minute*
 - *Write them down on the cards*



Mindfulness and Intentionality

- **Pay attention** to your values, purpose and goals
- **Pay attention** to your community and to your nonprofit partners
- *Consider*
 - Diverse forces/factors that are affected by these values and goals
 - Times when something was missing from a decision-making conversation
 - Moments that might lead you to “change up your questions.”



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What's Going On Out There?


- Changes among grantees – growth, closing, merging
- Nonprofits winning awards – excellence, innovation, new best practices
- Changes in the ecosystem or the community – emerging issues, new discoveries, competition
- Social, economic, political, cultural shifts at the local, regional, national and international levels



What's Going on in Here?

- Provocative responses, or inspiring insights from grantees
- Moments when board discovers it doesn't have the information it wants
- The decision-making conversation seems flat or routine
- New and interesting trends in philanthropic practice
 - Capacity building grants
 - Full-cost grantmaking
 - Funding networks and movements
 - Impact investing
 - Long-term funding for deep, systemic change

Resource Document

exponent philanthropy  2018 NATIONAL CONFERENCE

RESOURCES

Change Up Your Questions – Align Your Grantmaking Process with Your Values and Vision

September 28, 2018 1:15 p.m.

Exploring Who You Are As a Funder

What are you setting out to accomplish? What is your guiding purpose?	<ul style="list-style-type: none">Review your mission framework and/or mission statement.Assess how your various documents or materials reflect the goals of the foundation's founders or initial donors.Consider how the mission continues to shape your grantmaking practices, application process, or the ways you evaluate your partnerships.
What's important to you, to your foundation's leaders or to your family? What are your values?	<ul style="list-style-type: none">Examine the qualities, characteristics, and attributes that signify your most effective relationships.Assess the values that shape your decision making: Are they personal values rooted in your upbringing or community? Are they qualities that you feel should be lifted up as models?Note whether your values expressed as ideals ("Fairness to all") or mandates ("Be open-minded").Evaluate how such values are reflected in your practices as well as in how you identify whether those values are present among your nonprofit partners.
What are your beliefs?	<ul style="list-style-type: none">Examine the choices and basic assumptions which are built into your grant-making decisions, or how they impact your assessment of potential partnerships.Identify the fundamental beliefs or core principles on which you will not compromise. (If you were to turn away from these, your core identity could be at risk.)Examine the basic philosophies that shape your priorities; assess whether your practices and processes start from the same place.

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• Principles

- Explore who you are as a funder
- Explore your grantee partners
- Explore the world in which your grantee partners operate

• Tools

- Put everything on the table
- Take a look from different angles
- Experiment and assess

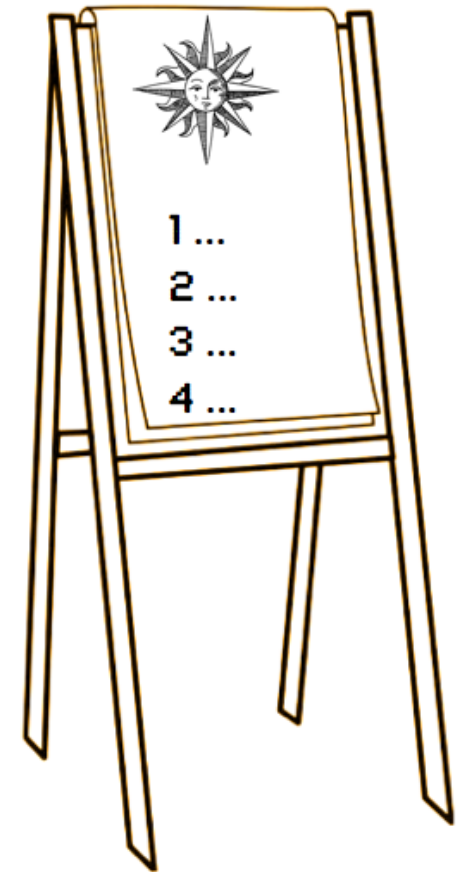
Let's Try This - Small Group Exercise

1. Share index cards prepared earlier with group
2. As a group, pick 2 or 3 ideas, topics or examples
3. For each, your group should develop:
 1. An application question **OR**
 2. A site visit question/guideline **OR**
 3. A review process component



Reporting and Sharing

- Share stories and insights
- Share your own stories where you had to “change up the question”
- Don’t forget our original questions:
 - What’s your **purpose**?
 - What’s your **vision**?
 - What are your **goals**?



Where else ...

- Where else might this play out?
- Continue to think about your purpose, values and goals.
- Are there are other areas of your work as a funder that might change as a result of this reflection?
 - Investments?
 - Advocacy or direct community engagement?
 - Collaborations with other funders or government agencies?

Recap

- Be mindful about your purpose and values
- Many forces and factors are at work
- Sometimes you have to change up your questions; align grantmaking with values or a changing world
- Be open to the many ways you can revise, alter, enhance or transform your grantmaking



Challenge

- How will you use what you learned today or throughout the conference?
- What will you do on Monday, based on what you learned?
- Don't keep it to yourself; share, tweet, blog; tell a family member or a trustee
- Take the time to look at your grantmaking; even the smallest change can have a big impact.

Thank you!

- Marshall H. Ginn, CFRE
- 202-213-3200 mobile
- marshall@capdevstrat.com
- @MarshallGinn

