# STEPPING INTO THE FUTURE

XXXXXXXXXXXXXXXX FOUNDATION BOARD MEETING – SPRING

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# ASKING BIG QUESTIONS – REFLECT FROM WINTER

- Like nonprofits, funders are being asked to examine their impact
  - Grantmakers of all sizes are focusing best practices
- Board members and trustees are being encouraged to reflect
- Asking critical questions of ourselves, the community, and our nonprofit grantees
  - How do grantees view this relationship? What are the emerging issues?



### INFORMATION GATHERING PART I - SURVEY

- Survey designed by consultant and staff
- Explored a range of issues and topics
  - Demographics
  - The grantmaking process
  - The Foundation's impact
  - Critical, emerging issues
- Sent to all grantees (approximately 80) at the end of January

- 49 responses were received
- Respondents represented the <u>full diversity</u> of the Foundation's grantees
  - Longevity of relationship
  - Size of grant
  - Size of organization
  - Type of organization
  - Issue addressed by the organization

### INFORMATION GATHERING PART 2 - PERSONAL INTERVIEWS

- Leaders from 20 grantee organizations were interviewed, in person, by the consultant
- Questions were similar to those asked in the survey
- Additional questions focused on such areas as
  - Relationship with the Foundation
  - Understanding of the Foundation and its priorities
  - Challenges they face as an organization
  - Emerging issues that Our Community will be facing
- Interviews were conducted in confidence at consultant's office

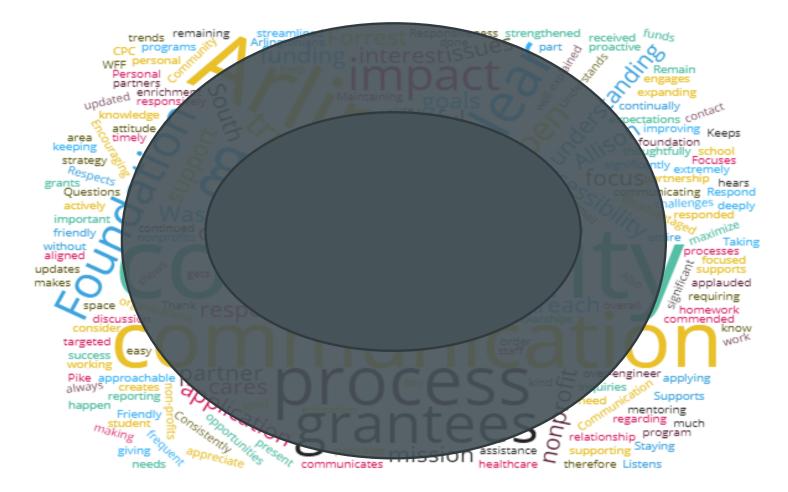
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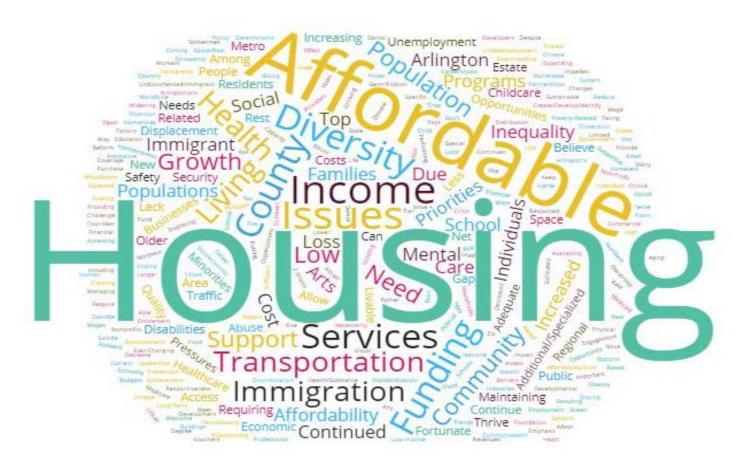
- Many positive findings Confidence that Foundation is on the right track:
  - Interactions with grantees are extremely positive
  - Work done on grant application process is highly appreciated
  - Unrestricted grants are being leveraged well, grantees able to accomplish much with reliable source of flexible funding

- There are opportunities to deepen and enhance both the Foundation's impact on grantee organizations as well as on Community
  - Grantees are eager for increased engagement in service of the work being accomplished
  - Information-gathering identified a broad range of emerging and long-standing issues facing Community
  - Grantees look to the Foundation as a source of leadership in Community, a catalyst for creating a culture of philanthropy in Our Community

- Grantees believe that the Foundation is doing many things very well!
- This is a 'word cloud' from the responses to the question: Can you share one thing that the xxxxxxxxx Foundation does really well?



- Grantees are attuned to and articulate about the emerging issues and needs in Our Community.
- This is a 'word cloud' from responses to the question: Over the next few years, what do you believe will be the top 3-4 issues that Our Community and Region will face?



- Themes and ideas routinely heard throughout all responses:
  - Consistency
  - Reliability
  - Flexibility
  - Intentionality
  - Understanding
- If the learnings from this process could be summed up in a single word, that word would be RELATIONSHIP

- Actual quotes from survey responses and interviews:
  - "They are a generous, consistent, community minded funder."
  - "In our case, the Foundation is helping us to make a difference in Our Community."
  - "It's a reliable source of revenue, but revenue with flexibility."
  - "They have managed to be consistently generous."
  - "Visit the programs you are funding see up front the good xxxxxc reates!"
  - "The impact is significant because it's been intentional."
  - "Before I had no idea; was blown away when I saw the list of grantees, how far reaching."
  - "The Foundation is very thoughtful in its requirements for grant applications and follow-up. Seems to be a desire to balance the need for information with the effort involved."
  - "Continue to engage with the leaders and frontline staff of the organizations you fund. Listening to them is key."



# FRAMEWORK FOR GOING FORWARD

- Relationship building between the Foundation and grantees
- 2. Monitoring processes and procedures focusing on what works
- Exploring and understanding emerging/key community issues
- 4. Looking ahead to the next 50 years

### RELATIONSHIP BUILDING

#### Establish a Clear Structure

- Clarifying when/how grantees as well as applicants get contacted/engaged/visited
- Setting a standard process

### Mutual Accountabilities

- Identifying what grantees need to do (timeliness, completeness of applications, responsiveness to questions etc)
- Providing opportunities for grantees to provide evidence of effectiveness and impact

### Issues to Consider

- Striving for a fair and balanced approach
- Investing in (and managing) the Foundation's internal capacity to accomplish this

### PROCESSES AND PROCEDURES

- Focusing on what's working, based on observation and grantee feedback
  - Consider another grantee survey in a couple of years
- Reviewing potential enhancements or changes to grantmaking tactics
  - Multi-year funding
  - Investing in capital projects undertaken by grantees
- Assessing and evaluating targeted components of the Foundation's work/process
  - Use of the LOI
  - Evaluation of grantees and evaluation of specific grants
  - Letting organizations go; narrowing the focus of grantmaking

### EMERGING AND KEY ISSUES

- Identifying the issues of the highest significance
  - Impact of poverty, income insecurity, and income inequality on Our Community residents
  - Shift in demographics in various Community neighborhoods
  - Perception that Community is growing too fast or growing the wrong way
  - Continued/Expanding needs for affordable housing
  - Families, as well as organizations, trying to plan for the future in the face of increasing uncertainty
- Exploring potential approaches to confronting these issues
- Clarifying the Foundation's role and the type of involvement it would wish to see from partners

### LOOKING AHEAD TO THE NEXT 50 YEARS

- Reviewing targeted issues learning more, undertaking research, exploring the issues so that grantmaking is informed by latest thinking
- Leveraging the Foundation's position as a leader to broaden its impact, for example:
  - Convene funders or nonprofit leaders or both to address issues, foster learning
  - Share perspective "what we've learned" through blog posts, writing and collaborations
- Assessing whether different, new types of engagement should be contemplated, for example:
  - Special one-time grants, such as a leadership development grant for an executive
  - Supporting organizations beyond the grant mentoring or coaching, or connecting to resources and expertise, etc.



### THANK YOU FOR THE OPPORTUNITY

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