
STEPPING INTO THE FUTURE

XXXXXXXXXXXXXXXXXXXX FOUNDATION BOARD MEETING – SPRING

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CAPITAL
DEVELOPMENT
STRATEGIES



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 full diversity 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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 - CCC
 - CCC
 - DDDD
- EEE
 - EEE
 - LLLLL
 - LLLLL
 - MMMM
 - PPPP
 - SSSSS
 - SSSSS

LEARNINGS

- 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

LEARNINGS

- 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 xxxxc 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

1. Relationship building between the Foundation and grantees
2. Monitoring processes and procedures – focusing on what works
3. 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.

REFLECTION

- What resonates with you?
- What more would you want to learn?

THANK YOU FOR THE OPPORTUNITY

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