




# Change Up Your Questions

Align Your Grantmaking Process with Your Values and Vision

September 28, 2018

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## 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)



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## 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

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### 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.




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### 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*




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### 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

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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

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Resource Document

- 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

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### 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




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### 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**?




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### 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?

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## 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

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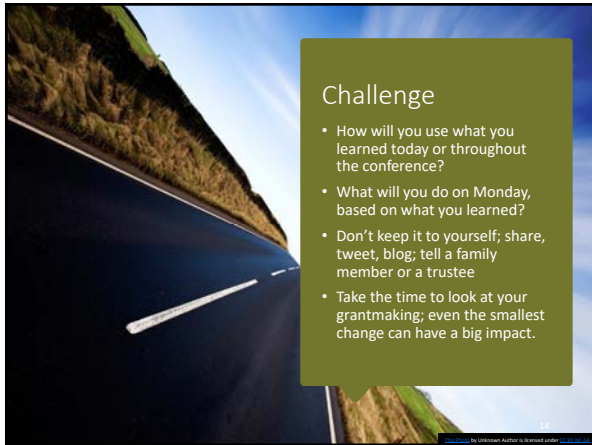
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### Challenge

- 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.

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## Thank you!

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