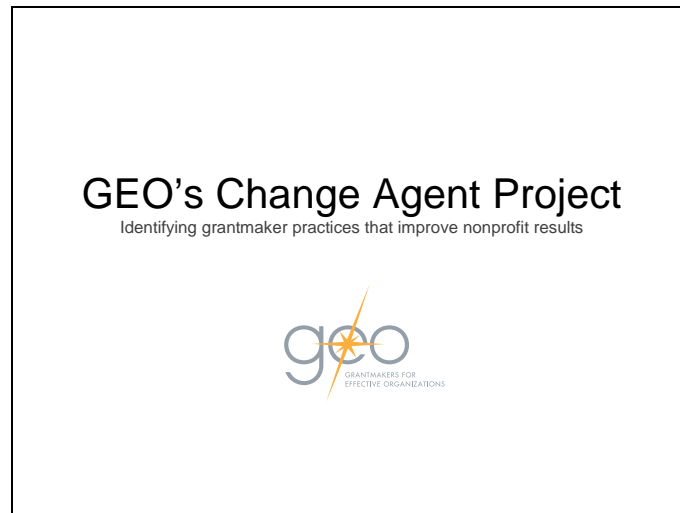


Regional Funders Forums

June 23 – July 4 2008

Courtney Bourns Power Point Presentation



GEO Has roughly 325 members of all sizes and types of foundation.
1500 individual members.

GEO's mission

Understanding that
**grantmakers are
successful only to the
extent that their
grantees achieve
meaningful results,** GEO
promotes strategies and
practices that contribute to
grantee success.

We realized that to fulfill our mission, we need to continue to deepen our understanding of what are those GM practices that either HELP or HINDER nonprofit's ability to achieve results...

And even better than having us be the spokespeople for the changes needed, would be to have the grantmakers discover for themselves what the changes would need to be, then they'd be more motivated to support those changes in the field.

GEO's Change Agent Project

What are the key changes that grantmakers could make that would have the biggest impact on nonprofit organizations' ability to achieve results?

3 years ago, started a national exploration to prioritize those changes that would make the biggest difference to nonprofits. And who are the exemplars? The *change agents* who are leading the way?

The DISCOVERY PROCESS.

Not too surprising. Degree of alignment pleased us.

The way we did it was important.

Process of engagement. Funders and nonprofit leaders in parallel.

Modeling our belief that *the answers lie in the community*.

Lay the foundation to really make change in partnership with funders.

Build momentum and alignment.

A way to begin to close the gap between *knowing* and *doing*.

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The Barriers List

Sustainability Issues

- Providing short-term grants for long-term work
- Lack of funding for infrastructure and planning
- Avoiding leadership development and board support

Grantmaking Mechanics

- Inappropriate and inconsistent application, evaluation and reporting processes
- Lack of clarity and focus for capacity-building funding
- Slow or unpredictable grant cycle time

At the heart of the focus groups and interviews we conducted was a list of “barriers” -- those practices widely identified as challenges for grantseekers.

Some overlap in practices that grantseekers in NZ might identify as challenges.

I’ll briefly review these: we lumped them into 4 broad categories: **sustainability issues, grantmaking mechanics, grantmaker-grantee relationship and strategy and approach.**

The Barriers List

Grantmaker-Grantee Relations

- Unclear communications and inconsistent messages
- Lack of a productive and supportive working relationship between grantmakers and nonprofits

Strategy and Approach

- Addressing symptoms rather than root causes
- Forcing collaboration rather than fostering it
- Controlling from the top-down
- Lack of sensitivity and respect for various cultural communities and marginalized groups
- Lack of predictability and consistency in philanthropy

We asked each group to first prioritize these barriers: which, if addressed, would make the biggest difference?

And then to dig in on the root causes of each priority barrier. Asking WHY do these barriers exist? And PERSIST?

(quite a few people said to us, “we’ve been talking about these barriers for ages. Why hasn’t anything changed?”)

The root cause discussions got into the nitty gritty issues facing the system: the power differential, differences in class, race and worldview...

Priority changes called for:

Three shared priority areas:

1. More unrestricted support
2. More multi-year support
3. Improve the productivity of the relationship between grantmakers and grantees

In the end, across 10 focus groups and 20 interviews with thought leaders in philanthropy and nonprofit sector, what rose to the top was amazingly consistent.

As you can see, 2 of them have to do with THE MONEY, and one deals with a range of aspects of the grantmaker/grantee relationship.

GEO's Change Agenda

1. THE MONEY

2. STAKEHOLDER ENGAGEMENT

(the people, the relationship...the power?)

For the GEO community, we've pared this down to 2 key themes: the money and the issue of stakeholder engagement—that is, engaging those closest to the issue in defining the solutions and the way forward.

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Unrestricted support:

- General Operating Support: “funding directed to an organization’s operations as a whole rather than to particular projects...”
- Negotiated Operating Support: “based on an agreed-upon strategic plan with outcome objectives.”

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Despite an overall increase in the percentage of unrestricted dollars, the perception is still that it's a bit radical to give unrestricted support to nonprofits.

And why is that? Well, a range of reasons which surfaced during our root cause discussions in the change agent project:

- fear of losing control
- hard to track the impact

-lack of trust...?

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Multi-year support

- Project Steamline report: *Drowning in Paperwork, Distracted from Purpose*
 - Transactions Costs
 - Lack of reliability over long-term impacts ability to deliver on mission

Grants Managers Network (GMN)

Similarly, change agents looking at Multi-year support realize that investing for the longer term allows a nonprofit to truly make a difference in the problem they're trying to solve.

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“Change Agent” Example

THE MONEY:
The Philadelphia Foundation

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Stakeholder Engagement

“The assumption is that practitioners are not the experts in the work they do—that instead the expertise lies in the academic and philanthropic worlds.”

-GEO nonprofit focus group participant

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Stakeholder Engagement

- Those closest to the issue/the problem have some of the greatest wisdom about how to address it.
- “Don’t do anything about me, without me”

And again, there are change agents doing creative things in this arena:

-Raymond John Wean: board, neighborhood grants program

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“Change Agent” Example

STAKEHOLDER ENGAGEMENT:
Raymond John Wean Foundation (Ohio)

www.rjweanfdn.org

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GEO's work ahead

- Promising practices are encouraging
- Building momentum for field-wide change

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For more information go to:

www.geofunders.org

The GEO Change Agent Project