

# Building Community Foundations

Bulletin # 13 July 1994

## Grantmaking Consulting Program

Sponsored by the Philanthropic Ventures Foundation  
Bill Somerville, President  
Funded by the David & Lucile Packard Foundation

## Grantmaking Consulting

Grantmaking consulting is available to community foundations in the United States and Canada. Foundations may request follow up visits; three foundations have had second visits and one foundation has had three visits. An on-site visit usually starts Monday afternoon and ends Wednesday afternoon; it includes evening and breakfast meetings as well as full day activity. The objective of a visit is to "audit" how a foundation is operating, and bring about new perspectives, insight, enthusiasm with the foundation Board and staff on how the foundation can operate more successfully.

For further information, call (510) 645-1890.

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## The Foundation as Convener

We wish to thank Lewis Feldstein, President of the New Hampshire Charitable Fund and Affiliated Trusts for allowing use of material from his talk "Convening by Community foundations" at the Fall 1993 conference for community foundations in this article.

Community foundations are in a unique position to bring people together. They are not political, they are not competing with anyone, they have no ax to grind. They are prestigious institutions run by professionals under the direction of Boards made up of significant citizens. They can bring people together who often wouldn't come together otherwise.

Community foundations can help people look at issues, become aware of new ways to think about an issue. Most importantly, community foundations, through convening, can bring people together who collectively can create new ideas.

### Basics

First, some basics: consider convening people around a meal but be sure the meal service does not interrupt the proceedings. One way to do this is to have box lunches or self-service buffet presentation. Good food goes a long way to improving morale and people

remember it.

The rule regarding group size is up to eight people for an intimate discussion, up to fifteen for maximum interchange, beyond fifteen one needs to give careful attention to bring about give and take.

Try to set up the room so that everyone can see each others' eyes, ideally a circle. Another format is a U shape with the facilitator standing in the middle. If the group is 25 or more, it usually turns into an auditorium type seating.

Be careful about and give prior thought to the comforts of the room, lighting, fresh air, temperature, chairs. If any one of these isn't right, your meeting could falter because people are distracted.

Use a facilitator who has a proven record of running good meetings, i.e. bringing people out and making sure everyone participates. Facilitators can cost up to \$2,000 a day but it isn't necessary to pay that much. The point is, you need an outsider to help run the meeting unless you want to run it yourself and if you do, it makes it very hard for you to participate as well. Parenthetically, community foundations might want to consider paying for facilitator training for persons who can be called on.

Be clear on who you want to invite to the meeting and make your invitation as straightforward as possible, not "You have been selected to attend...." Try to give people enough time ahead so that they aren't already booked.

### Topics

One foundation executive invited five professionals to meet with him in his office over box lunches. All of the professionals were African Americans. The question put before them was, "What more can this foundation do with regard to special population groups?" It is significant to note that the group chose to focus on youth, not just African American youth, all youth.

The conversation went on for two hours as a brain storming session and afterwards, the foundation executive had new insight, ideas, and awareness which could be used in future grantmaking by the foundation.

Convening can take many forms. Small sessions such as above or larger groups which Lewis Feldstein describes that pull people together across communities and neighborhoods to discuss political concerns. In New Hampshire the community foundation's goal was to build a civic infrastructure around the state.

Feldstein urges foundations that are considering playing a role in convening people to first ask, 'Why are you convening?' You need to be clear on what you are trying to do. For example, one can convene to:

- Get information out to more people
- Influence your own policies, learn something
- Influence policies of others
- Get people to see you as a player

In New Hampshire sessions were held to hammer out an agreement on protected land, to deal with rural poverty and rural issues, to discuss the new national service program, to look at the role of philanthropy in hard times.

### Format

Feldstein tries to invite a variety of people to the sessions he holds. For example, the session on rural poverty included authors, a poet, and newspaper people. The session on national service included scholarship donors and non profit executives. The session on philanthropy in hard times brought together politicians and corporate donors.

Feldstein suggests using a professional mediator to run some of the sessions convened by foundations. He also uses meal sessions for convening, citing that it is symbolic to feed people. Most often he stays with 10-15 people at a session.

The rules of convening that Feldstein proposes are:

- Get the setting right
- Make a strong effort to get the right people to come
- Use a round table
- Feed people
- Make sure notes are taken
- Be willing to let it "go out of control"
- Try small groups first
- Don't let one or two people dominate the talking

He warns that things can go wrong. They can "blow up in your face," be boring, come to no resolution. "It's not easy to convene successfully."

### Conclusion

When Feldstein brings people together he trusts them to come up with ideas, to work on problems, and to build a base of support. It is important to note that trust is one of the most valuable outcomes of convening people. As people get to know each other in a supportive setting, as they struggle together with a focus to their efforts, as they give and take and build on each others contributions, trust develops.

Convening is a wonderful way to build the foundation. Feldstein points out that to offer your table you get to tell your story, you are seen as a trusted broker who plays an important role. You have the clout to bring people together. At your table people know they will meet interesting persons. You are able to bring in national and regional experts; you helped bring about new ideas. Something unusual happens when people come to your table and people get a sense of your potency.

There are no important problems to which there is a single factor answer. There are no single solutions. No one organization can solve the problem. Thus Feldstein strongly encourages community foundations to play a role as convenor over and over again.

# Comments On Grantmaking Consulting

## From the Fargo-Moorhead Area Foundation (North Dakota)

"He was particularly effective in raising the credibility of our foundation with other local funders. He also made a very strong case for the important linkage between good grantmaking and fund development."

Susan Hunke  
Executive Director

"Direct hit – I thought he scored a bull's eye! The vital link between grantmaking and development."

"I think he made us face some issues that we had been avoiding, it was hard but necessary."

"He was frank and honest and I respect that. I appreciated getting the benefit of his experience with other community foundations."

"Very stimulating – very challenging. We received a number of practical suggestions to implement."

### Board Members

As part of the consulting, often a meeting is held with other funders in a geographic area, hosted by the community foundation. The following are comments by funders in North Dakota.

"Excellent. Shed a positive light on reviewing requests."

"Interesting and helpful ideas."

"Very informative, interesting, inspiring."

"We should continue to meet."

This newsletter is published monthly as a service to community foundations. Past topics include: *The Application Procedure; Getting Out into the Community-What's Worth Funding?; Risk Taking and Grantmaking-Do They Go Together?; Foundation Board/Staff Relations; Accountability and Efficiency; Services to Non-Profits; The Site Visit; Foundation Records Retention; How to Benefit from Technical Assistance-Using Consultants Effectively; Scholarships: The Most Labor Intensive Grantmaking; and What is Worth Funding: Initiated Projects.*

Back issues are available by calling 510-645-1890.

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