

Building Community Foundations

Bulletin # 23

September 1996

Grantmaking Consulting Program

Sponsored by: Philanthropic Ventures Foundation, Bill Somerville - President

Funded by: David and Lucile Packard Foundation

TRAINING FOR PROGRAM OFFICERS

Three day training sessions are now being offered if 5 - 12 program officers in a given geographic area register. The first training session was held in New Haven in August. Further sessions are planned for Ohio and a repeat in Connecticut. The cost is \$100 registration fee plus travel and living expenses.

Training covers:

- *How to effectively review proposals asking for money.
- *How to understand financial reports and what kinds of reports are most useful to require.
- *How to develop Funding Guidelines which are concise, friendly, comprehensive, and which bring you the information you need.
- *How to work with applicants from a telephone call of intent to a site visit reviewing the funding application.
- *How to evaluate grants that have been made and their effectiveness.
- *How to file and keep track of grants and grantees.

Training is as "hands on" as possible. Training takes place on a regional basis e.g. southeast, west, northwest, midwest, etc. This reduces travel costs and enhances the possibility of people sharing experiences after the seminars.

Training will include:

- *Role playing for realistic situations of working with applicants.
- *Actual proposals for review which will cover a spectrum of the types one should be ready to deal with.
- *Handout materials showing what a variety of foundations use in their work for funding guidelines, staff write-ups, reports to Grants Committees.
- *Follow-up opportunity by participants to get telephone advice and answers to questions.

For further information, call (510) 645-1890

New Techniques In Grantmaking Use of Stringers

What is a stringer? Time magazine has various persons on the lookout for interesting stories. Such a person can submit a story and if it is accepted, the person is paid. Why not the same system for community foundations - except no payment is necessary?

Why not invite newspaper reporters, columnists, feature writers - professionals who are trained to find interesting people doing significant things - to call your foundation when they come across an item that might be of interest.

An example is a feature writer who came across an ex gang member who has a car painting business and who hires young boys. His goal is to get the boys out of gangs and to teach them a business. The foundation executive visited the man and worked out how more boys could be hired and receive school credit. There was a need for insurance coverage to do this and the community foundation offered to pay for it.

In addition to newspaper people, one could use TV reporters, retired persons, Jr. League members as stringers. It is a compliment to invite someone to contact your foundation with good ideas and media persons especially feel they have been given a new responsibility that enhances their work.

When we ask “How do you find an emerging idea?” maybe this is one method to try. The payback to foundations is not only having an ear closer to the community but creating a better understanding with media professionals of what the foundation world is all about.

Good Grantmaking Is Good Fund Development

The best way to increase a foundation’s assets is to increase its reputation and that is done through grant making. Internally, community foundations need to be sure there is articulation between the development person and the program officer. Ideally, they will work together in persuading people to contribute to the foundation.

This isn’t always the case. In some foundations there is a physical separation between development and program functions with little interaction.

The development person should be well informed of program accomplishments by the foundation and should consider having a program officer along when asking donors for money. Nothing excites a donor more than to hear first hand about good funding in the community.

Alicia Philipp, executive director of the Metropolitan Atlanta Community Foundation is well along in integrating the work of development and program officers (404) 688-5525.

Common Application Forms

Members of the Northern California Grantmakers have developed a *Common Application Form* and a *Common Application Cover Sheet*, a total of 4 pages.

The New York Regional Association of Grantmakers and the Council of New Jersey Grantmakers have developed the *New York/New Jersey Area Common Application Form*, a total of 4 pages.

Both of the products listed above are the outcome of considerable effort by foundation personnel and they are useful in pointing out the major aspects of information needed from applicants. It is interesting to note that both common forms ask for narrative as opposed to presenting an application format (other than name, address, etc.).

Sample forms can be obtained by calling:

Northern California Grantmakers	(415) 777-5761
New York Regional Association of Grantmakers	(212) 714-0699
Council of New Jersey Grantmakers	(201) 267-5533 ext. 20
or Contact the Editor at	(510) 645-1890

Directories As A Marketing Tool

Does your community have any of the following:

- ◆ **Directory of Local Funders for the _____ Area**
- ◆ **Directory of Human Service Programs for the _____ Area**
- ◆ **Youth Directory for the _____ Area**
- ◆ **Cultural Directory for the _____ Area**

On such directories is could state “Published as a Public Service by the (your name) Community Foundation.”

These directories are either given out free or sold for a nominal amount. They are the sort of reference documents that are useful to professionals, teachers, youth, law enforcement. It is interesting to note that the directories have unexpected assets such as stimulating giving in a community by wanting to be listed in the directory.

An expert in creating such directories and advising others is:

**Janet Hofmann, Manager
Community Information Program
Peninsula Library System
(415) 595-7950
462 Harbor Blvd.
Belmont CA 94002**

New Service

The Grantmaking Consulting Program now offers facilitating Board retreats. These retreats have been from 1/2 to 1 1/2 days. They allow for strategic planning, for clarifying where the foundation is going, for board members coming to know each other better.

Past retreats have resulted in new Board enthusiasm, a new sense of direction, new goals, a better understanding of the foundation’s operation.

The cost of facilitating Board retreats is negotiated according to the size of the foundation. The minimum fee is \$500 a day plus travel, meals, and lodging.

COMMENTS ON GRANTMAKING CONSULTING

"Thanks to your inspiration and nudging of my board, our manner of making grants is slowly changing."

Sue Ellen Harwood
Executive Director
Sonora Area Foundation, CA

"Thank you for a wonderful Board retreat. We have already seen benefits. Our Education Committee meeting was much different post retreat. They were more interested in taking chances and the general discussion was much more candid and comfortable."

Kathy Huschke
Senior Program Officer
The Fremont Area Foundation, MI

"Your visit with us was more useful and valuable than we had anticipated. We summarized your suggestions for review by an ad hoc committee whose recommendations were adopted by the Board. Our grants program in particular is already the better for your visit."

Phil Sherman
President
Foundation of Madison & Jefferson County, IN

Three day on-site grantmaking consulting visits are available to community foundations. The only cost is the consultant's food and lodging if the foundation has assets below \$8 million and his travel expenses if over \$8 million. His time is funded by the Packard Foundation. Over 120 community foundations have participated in this consulting program.

For further information call Bill Somerville at (510) 645-1890.

Building Community Foundations

Philanthropic Ventures Foundation
1212 Preservation Park Way
Oakland CA 94612

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U S POSTAGE
PAID
OAKLAND CA
PERMIT NO. 962

Advisory Committee

Bill Bondurant
Tullia Hamilton
Helen Monroe
Peter Pennekamp
Janice Windle