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BUILDING COMMUNITY FOUNDATIONS

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GRANTMAKING CONSULTING PROGRAM

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COMMUNITY FOUNDATIONS & SPECIAL EVENTS – A CASE STUDY

The following report was submitted by Clare Payne Symmons, Executive Director of the Community Foundation of Jackson Hole in Wyoming. The foundation has assets of \$8 million of which almost all of the money is restricted. Rather than lament this situation the foundation and board figured out a strategy to do grantmaking equal to that of a \$35 million foundation and become very well known in the community.

The story of the Community Foundation of Jackson Hole is about a donor's idea that became (in one year) the identity piece for the Foundation and a means of encouraging community-wide philanthropy.

Jackson, Wyoming is a small resort town in the Northwest corner of Wyoming, tucked into the Grand Teton Mountains. The population of 4,700 in town, 17,000 in the county, is often eclipsed by the tourists who flock there summer and winter. In this active community, over 140 non-profits alternately thrive and struggle for existence.

The Community Foundation of Jackson Hole (CFJH) began in 1989. It suffered from a lack of identity outside the central donor family, and its grants were fairly small.

Enter Mr. and Mrs. Old Bill, significant donors and involved members of the CFJH family. They had an idea that would increase familiarity with the Community Foundation while increasing assets and boosting foundation giving in one swoop: Old Bill's Fun Run for Charities.

The premise is fairly simple: Mr. and Mrs. Old Bill put up a \$500,000 per year matching grant (for 3 years). Donors could give money to be matched through the run. The donors could specify the non-profit to receive the gift plus the match, so long as the non-profit had

a participant in the run itself. The match broke out as follows: 50 % match to the non-profit, 25% to the foundation for granting in that year, and 25% to be given out immediately by an ad hoc citizens “Blue Ribbon Committee.” For example, if a donor gave \$1,000 it would be matched 1:1. The non-profit would receive \$1,500, the foundation would have \$250 for grants, and the Blue Ribbon Committee would have \$250 for grants. The maximum for any one non-profit to receive from matched money was \$30,000. The purpose of the Blue Ribbon Committee was to provide grants to organizations that participated but that did not have the capacity to bring in the really big bucks.

Each non-profit was responsible for soliciting gifts toward its organization. Donors could write one check, and allocate the funds to several different non-profits.

The role of CFJH was to promote the concept, manage the contributions, and organize the run. We found a person who could both manage the run and come on board as a permanent program officer. We had nine months to pull off this first-ever event. With this much lead-time, the run logistics were simple compared to the initial set-up and arrangements of the finances.

The September day of the run was clear and crisp. We had 680 runners, walkers, and wheelchair participants (the largest race in town before this numbered 250). Their ages ranged from 5 to 85. A costume component helped lend a festive air to the event. A herd of bison, some pieces of fine art, and several cherubs took to the route. Over 100 volunteers helped in every facet of the event. We had created a community-binding event that made all feel as if they had personally played Santa Claus. The lines that define us were blurred: wealthy and not-so-wealthy, part-time and full-time residents, donor and recipient were all bound by our common goal.

By the day of the race, we had not only met the \$500,000 challenge – we had received \$1,100,000 in contributions from over 2,500 people, with gifts coming from 49 states. Contributions ranged from \$.50 to \$50,000.

With last minute help from the Board to raise an additional \$244,000, we were able to fulfill our promised 50% match to each participating non-profit. We granted funds to nearly every non-profit in town. A total of \$1.8 million was channeled into charitable coffers.

The anonymity of the original donors provided an added bonus to the event. Because attention could not be focused on the donors, it was focused instead on the vitality and variety of the non-profit sector. The non-profit organizations as a whole became the cause of celebration, with the Community Foundation as the recognized hub of philanthropy in the area.

The non-monetary benefits to the Community Foundation were significant. All of a sudden, we became a household term. We were recognized by the Chamber of Commerce in their annual awards banquet. We garnered positive editorials in both papers. We now receive coverage for every single press release we send. We are now an acknowledged leader in the philanthropic community.

There were only a few problems with the event. We began with considerable distrust: the “what’s in it for you” question resonated for a short time. When the non-profit leaders finally figured out that this was for their benefit, they jumped on board. Our database system was virtually overloaded with entries. We didn’t expect the kind of response we received.

The average amount raised per organization was \$7,000, so we decided to lower the maximum match to an agency from \$50,000 to \$30,000 to give more opportunities to smaller organizations. This year we are raising more money for the match portion. We began with Mr. and Mrs. Old Bill’s continuing \$500,000 pledge, and have raised an additional \$300,000 to date. We plan to get \$1.1 million in match money, using last year’s needs as a goal.

This is a special event, which we feel is an extension of our program activities. We are fulfilling our mission to promote philanthropy, encourage collaboration among non-profits, and make grants to area non-profits. It fits well into our vision of our place in the community.

Whenever we think about this event we reflect on the leaps we have taken in public awareness, utilization, and community leadership. Our asset growth, our increased granting ability, and our stature in the community are all benefits of Old Bill’s Fun Run for Charity. We are grateful we listened to our donor.

Grantmaking Consulting Services

- I. **Three-day on-site visits** include a program audit of foundation operations, extended meetings with the Board and Grants Committee, and interviews with the Executive Director, staff and chairpersons. [**Cost:** Consultants room and board – include travel if assets over \$8 million.]
- II. **Two day training for program officers** using a 300-page syllabus covering all operational issues. Available for groups of 5-10 program officers in a region. [**Cost:** \$100 per person.]
- III. **Facilitating Board retreats** for periods from 1/2 day to 1 1/2 days. These are focused sessions leading to specific outcomes. [**Cost:** Consultants travel, room and board.]

COMMENTS ON GRANTMAKING CONSULTING

“Many of our board members have said our meeting with you was the best meeting we ever convened. We all agree that our new approach to grantmaking will be more responsive... You inspired us all!”

**Jeanne A. Bovard, Executive Director
Scranton Area Foundation, Pennsylvania**

“As a result of Bill Somerville’s visit, our foundation will:

- *make better grants,*
- *award them faster*
- *generate a lot less unnecessary paper, and*
- *spend less staff time serving the board and committees and more on the foundations mission.”*

**Mary M. Holmes
Cumberland Community Foundations
Fayetteville, North Carolina**

Building Community Foundations has polled a number of community foundations asking them to share information on outstanding grants that they have made. A summary of this survey will be presented in the next issue of this bulletin.

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