

BUILDING COMMUNITY FOUNDATIONS



Philanthropic
Ventures
Foundation

Bill Somerville
President

Grantmaking Consulting Program

BULLETIN 53 | APRIL 2002

Funded for 9 years by:
The David and Lucile
Packard Foundation

GETTING INVOLVED WITH YOUR GRANTEES

Community foundation personnel want their grants to have impact. Almost every foundation's mission statement includes the words "to better the quality of life in our community." How do we know this is happening with our grants?

One way is to get to know our grantees better. Because of the burdens associated with a high volume of paperwork, foundation personnel are locked to their desks. We know our grantees primarily through correspondence. Are there other ways to get to know grantees?

One foundation executive recently asked the director of an agency serving the homeless if he could accompany a staff member on their evening "shift" serving the homeless on the streets. It turns out this was the first time a funder had made such a request.

The evening started out in the agency's modest offices where the funder was introduced to the supplies such an effort requires. The agency's drawers were full of "street essentials" such as condoms, clothes, toiletries, small food items, bandages, blankets, etc. Of these supplies, demand was highest for socks. Some items connected with drug use were also available for distribution. By listening to why these items were made available, one comes to understand better the philosophy of programs serving the homeless and the problems faced

GRANTMAKING CONSULTING PROGRAM FUNDING

We are pleased to announce that The David and Lucile Packard Foundation has approved funding for the Grantmaking Consulting Program for the eighth and ninth year. Through this effort, over \$1 million has been invested in grantmaking consulting which has reached 250 plus foundations in the United States, Canada, and the United Kingdom.

PLEASE ROUTE TO:

Executive Director

Program Officer

Chair Grants Committee

in working with this clientele.

In addition to the valuable information gained about the agency and its clientele, the visitor was given what he considers to be the most thoughtful paper he has seen on understanding homeless youth (see side bar). None of this would have happened without the foundation executive taking the initiative by visiting the agency while the staff were at work.

The point to be made is that in reaching out to grantees to better understand their work, you develop a relationship of trust. The agency personnel gets to know you better - beyond just the person who gives out grants. It is very trusting of them to let you see them at work. Similarly, you get to know them better as well, increasing your understanding of their work and increasing your confidence in their efforts.

Open houses are not the way to observe an agency. This is a ceremonial event where they have polished the silverware because important people are coming to visit. It is not a time when the agency is at work.

Another way to get to know a grantee better is to ask to attend an agency's staff meeting. A foundation executive did just this. He observed how the meeting was used to develop rapport, trust, and mutual support among staff persons who work in satellite offices. One could not help but come away with an increased respect for the agency.

It is noteworthy that the staff persons at the agency felt honored by the presence of a funder at their meeting and regarded the funder as someone who wanted to be more informed about their work.

The foundation person who made this visit is in a better position to evaluate the agency and its work and to help the foundation board understand the meaning of "to better the quality of life..."

"Homeless Youth Development: A Theory of Change from Survival to Stability"

At The Crossroads
San Francisco CA

For a fax copy of this four page article, call (510) 645-1890.

GOOD READING

"The Meaning of Social Entrepreneurship"

by J. Gregory Dees

Miriam & Peter Haas
Centennial Professor
in Public Service

Graduate School of
Business, Stanford
University

For a copy via e-mail,
contact:

info@venturesfoundation.org

The most intimate documents an agency can share are the Minutes of a board meeting. Foundation personnel might want to read Minutes from time to time. For example, observing board attendance, items board members focus on, length of the meeting, outcomes. On the flip side, a funder does not want to give the impression of being a micro-manager. This is where the trust between grantee and grantor is critical.

In a sense, foundation work is an effort to know and understand grantees and the perspective they have on the clients they serve. One of the best ways to gain this knowledge is to be there as the agency is going about its daily work.

One foundation has the motto: "find people you trust and fund them." Trust is a vital ingredient in grantmaking. Seeing the grantee agency at work, indeed participating in that work on occasion, is an outreach effort recommended for foundation personnel and one which is very much appreciated by the grantee.

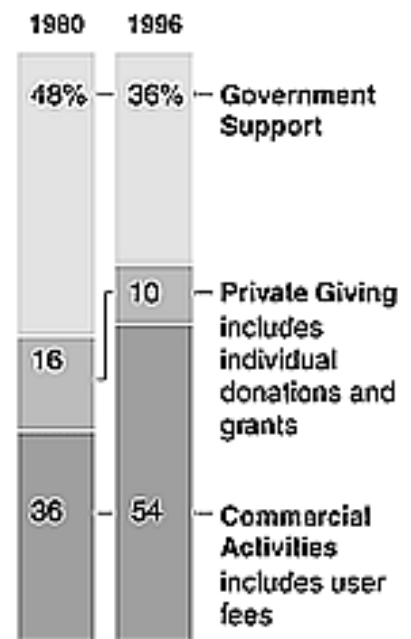
PROFESSIONAL DEVELOPMENT

The Northern California Grantmakers published "Professional Development for Experienced Grantmakers" in 2001. It is the result of focus groups involving 45 people, representing hundreds of years of experience in philanthropy, plus others who submitted their thoughts in writing. The report is 14 pages and has 193 specific bullet points on professional development.

The report should be of interest to persons in the non-profit field and can be obtained by contacting Janet Bankovich of the Northern California Grantmakers at jbankovich@ncg.org.

Nonprofit Income

A breakdown of where American nonprofit organizations raise their money:



Source: Lester M. Salamon, "America's Nonprofit Sector"

DID YOU KNOW?

Nonprofit groups spent \$785 billion in 1999.
 Chronicle of Philanthropy
 March 18, 2002

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Philanthropic Ventures Foundation's Grantmaking Consulting Program

PVF has provided on-site consulting to over 250 community foundations throughout the USA, working with staff, board members and the community to improve grantmaking and operations. The Consulting Program is in its 9th year of operation and has been funded by The David and Lucile Packard Foundation since its inception. The PVF consulting fee is paid for by The Packard Foundation. Participating community foundations are asked to pay for travel, meals, lodging and program officer training fee.

Comments on Grantmaking Consulting

"What an impression you made on my FIST kids. As they were reviewing grants this month, your name and "your words" came up many times. Thank you so much. In one meeting with them you accomplished so much."

Lorna Leaders, Program Officer

Steuben County Community Foundation, Indiana

The services offered include:

- **Program Audit and Evaluation** - Intensive 3-day on-site sessions focusing on analysis of foundation operations, grantmaking programs, public relations and internal procedures. Includes meetings with foundation board, grants committee, board chair, foundation staff, and executive director. Also included are meetings with funders, interviews with local media, and meetings with local non-profit organizations. The days are full and intense with the result being new enthusiasm, new expectations and new ideas.
- **Program Officer Training** - 2 full days of training for foundation personnel, involving problem solving, interaction of participants and exchange of ideas, accompanied by 500-page reference manual created by PVF. Participants analyze actual grant requests, evaluate and make grantmaking decisions and engage in role-playing.
- **Board Retreats** - Facilitator for Board Retreats (1/2 to 2 days). Work through issues facing foundations including growth, planning & community outreach. Facilitator draws out strengths and weaknesses, serving as guide through strategic planning process.

For more information on the Grantmaking Consulting Program contact Bill Somerville at PVF:

(510) 645-1890

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