Ignite Presentation: Hancock County
Background Context
Grantee/Partner Feedback That Informed Our Action Learning Project
Grantee/Partner Feedback That Informed Our Action Learning Project (2)
Action Learning Project Overview
Action Learning Project Overview (2)

70 → 602
1 → 456

1058 TOTAL
Lessons Learned

Themes of Concern

Tier 1
- Safety
- Addiction
- Safe and Affordable Housing
- Safe and Affordable Transportation
- Living Wage

Tier 2
- Diversity
- Affordable Childcare

Tier 3
- Education
- Life Skills/Job Training
- Affordable Community Activities
- Mental Health
Lessons Learned (2)

SO...

WHAT DID WE LEARN?
Lessons Learned (3)
Lessons Learned (4)
Background Context

- Institute of Mental Hygiene, founded in 1937 by Samuel Zemurray
  - Mission: Promote the optimal mental health for children and their families in the New Orleans Area

- We serve the city of New Orleans (Orleans Parish).

Facts About New Orleans, Louisiana

- 52% of children live in single-parent households
- Still recovering from Hurricane Katrina
- 43% of Children live in poverty
• Collective Impact Initiative: Grade Level Reading Campaign

• Goal: All New Orleans Children read at or above grade level by the end of 3\textsuperscript{rd} Grade.

• Our Grade Level Reading Campaign has the support from some 50+ organizations

44% Third graders not reading at grade level
Grantee/Partner Feedback That Informed Our Action Learning Project

- Results from IMH’s grantee/partner surveys
  - Greater Clarity on Grant Decision timeline and Rationale
  - More Information on IMH’s grant making strategies and priorities
  - Suggestions on increasing the flow of information between IMH and grantees (e.g., listening tours, 1:1 conversations)
Action Learning Project Overview

- IMH’s Openness in Practices
  - Internal Openness
    - Engage IMH Board
  - External Openness
    - Initiate Process of Inviting Grantees to Board Meetings
• Board Engagement Around Openness and Transparency
  • Well-Informed Board

• Grantee Presentations with Q&A
  • How programs/projects align with IMH
Lessons Learned

- IMH Board Members are More Engaged and Involved
  - Able to speak on program activities
  - Making connections within the community
Lessons Learned (2)

- Grantees Are More Informed and Involved
  - The questions and key concerns about our processes and rationale are being answered
Lessons Learned (3)

- Lessons learned from our Action Learning Project
  - Develop a plan to engage the community and those not involved in community impact to have a full circle of engagement
• Lessons learned from our Collective Impact Initiative
  • We need the support of others in the community. We can’t make the change alone.
Our Impact:

- We invest in some **1,000 organizations** every year
- We are one of Canada’s largest granting foundations – with a budget of over **$136 million each year**
- Over the **next decade** we will invest **$1 billion** in Ontario
Bringing fundamental change with collective action

The OTF Collective Impact Model includes the following three stages:

- **DEFINE** the impact
- **ORGANIZE** for impact
- **DELIVER** impact
• The two **most important openness practices** according to OTF survey respondents:
  
  • **Feedback Loops:** Hears directly from grantees, community partners, and the people that funders and nonprofits seek to help
  
  • **DEI:** Actively accepts and respects all participants, ensuring diverse individuals are able to participate fully in the decision-making processes within an organization or group

• The two **most effective openness practices** according to OTF survey respondents:
  
  • **DEI:** Actively accepts and respects all participants, ensuring diverse individuals are able to participate fully in the decision-making processes within an organization or group
  
  • **DEI:** Encourages diverse representation of a range of groups, recognizing the value of individual differences and experiences
• OTF’s openness practice with the greatest variation between importance and effectiveness was focused on feedback loops:

Hears directly from grantees, community partners, and the people that funders and nonprofits seek to help

• Most common suggestions for what OTF could do to improve their openness practice:
  
  • greater flexibility to meet varied grantees’ needs
  • more opportunities to share learning among grantees
  • more targeted capacity building support for CI partners
### OTF: Action Learning Project Overview

<table>
<thead>
<tr>
<th>WHAT WE DID</th>
<th>HOW IT RESPONDED TO SURVEY RESULTS</th>
</tr>
</thead>
</table>
| Build distribution list of each collective (March 2017) | • Hear directly from grantees, community partners and non-profits  
• Include broader diversity / representation individuals, community partners not just lead org / grantees |
| Survey to grantees and partners (April-May 2017)      | • Hear directly from grantees, community partners and non-profits  
• Generate more detailed feedback from our grantees and their partners  
• Include broader diversity / representation individuals, community partners not just lead org / grantees |
<table>
<thead>
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<tr>
<td>Shared survey results with grantees and partners (July 2017)</td>
<td>• Address the lack of feedback loops</td>
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<td>• Meet varied grantees and their partners needs</td>
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<td>• More opportunities to share learning among grantees</td>
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<tr>
<td>Developed capacity building activities (August 2017)</td>
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<td>Begin implementation (September 2017 and beyond)</td>
<td>• Offer capacity building and peer learning opportunities around key topics:</td>
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<td>• Community Engagement</td>
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<td>• Communication Strategy</td>
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<td>• Creating Shared Measurement</td>
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<td>• Create COPs and co-learning opportunities to allow grantees to learn from each other.</td>
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</table>
What we can do more of:

“This is the first time a major funder has worked with us in a real way and felt like a part of the team.”

“I have found OTF to be very open and helpful in this process.”

“So far, OTF has been very supportive and have responded to any request we have made.”

What we can work on:

“I wasn’t aware of how involved OTF wanted to be with our project until I attended a workshop. It would be helpful if OTF staff reached out to emphasize that you are not just funders, but also stakeholders in our efforts.”

“I am not in a leadership position in this collective so I haven’t had direct support from OTF on this Collective work…”

“I found the slowness of the process and the need to ‘progress’ through defined stages frustrating.”
OTF and Tamarack: Lessons Learned (2)

What we can do more of:

“So far, Tamarack has provided a wealth of knowledge, both theoretical and practical.”

“I attended the CI workshop and found it incredibly enlightening. It was great to be able to hear about other grantee’s/potential grantee’s initiatives and strategies for tackling different complex issues.”

“The coaching is particularly valuable for the insights that are offered that are tailored to the needs of our collective...”

What we can work on:

“It is not clear to me how Tamarack is involved.”

“I have attended Tamarack Conferences personally, I am not aware that our collective has engaged in work with Tamarack Services.”

“More straightforward methods for accessing coaching services.”
Top Capacity Building Opportunities Asked for by Collectives:

- Developing a Communication Strategy
- Getting the Community Involved
- Creating Shared Measurements

Of the Potential Topics Suggested, the Least Favourite was:

- Developing Learning Tools

Top Suggestions from Collectives:

- Building Capacity opportunities for First Nation communities
- How to keep the momentum while continuing to build CI infrastructure
- Funding for Backbone Staff
• Grantees want to be able to learn from each other. They want to share their successes and challenges with one another.

• When OTF is actively at the table, grantees feel supported and the relationship becomes more than funder – grantee.

• Initiatives are finding it difficult shifting groups from cooperating together to using a Collective Impact approach.

• If the partner is not part of the lead organization or on the Leadership Committee, OTF’s role as a partner in their Collective Impact initiative is not clearly communicated or understood.

• Need to develop an effective way to communicate not only between OTF and lead organizations, but also with collective partners.
Background Context

• Robert R. McCormick Foundation
  • Biggish ($2B in assets)
  • Conservative reputation
  • Embracing a Race Equity framework

• Communities Program
  • Nationwide; evolving
  • Fundraising and Grant-Making
  • Raise $12M annually; Grant $18M
• Fund statewide, but mostly in the Chicago region
  • Big city
  • Some communities thrive while others are neglected
    • Poverty, segregation, violence

• 3 CI efforts
  • Thrive (Cradle to Career)
  • Englewood – Quality of Life Plan
  • Little Village – QLP

• **Most Important:**
  
  • Community Engagement
  
  • Participation of diverse individuals/communities

• **Most Effective:**

  • Participation of diverse individuals/communities
  
  • Encourage diverse representation
• Most Common Suggestions:

  • More transparent grant strategies/processes
  • More opportunities to co-create with grantees
  • More frequent communication with grantees
Action Learning Project Overview

- **Ignite Englewood**
  - Community-Advised Fund
  - Raise money with the community
  - Community advises on grant strategies
    - Strategies based on Quality of Life plan
      - Education, Safety, Employment, Health, Housing
Action Learning Project Overview (2)

• **Impact Englewood Action Items**
  • Building Trust
  • Board Approval
  • Staff Training
  • Forming the committee
  • Creating MOU’s
  • Developing Fundraising and Grant Strategies
  • Revising Grant Application

• **Responsiveness to Survey**
  • Community Engagement
  • Co-Creating with the Community
  • More transparent grant strategies/processes
  • More frequent communication with grantees
Lessons Learned

• Nothing moves quickly in philanthropy
• Respect and be responsive to the beliefs, practices and needs of diverse groups
• Transparent processes are important to hold all parties responsible and keep the work aligned
Lessons Learned (4)

• It takes a long time to build trust among diverse groups
FOCUS:
- Community Development
- Human Services
- Education
- Culture and Arts
CAPACITY BUILDING
WHAT DID WE LEARN FROM OUR GRANTEES


• FUNDER OPENNESS IS IMPORTANT

• WE DO IT WELL

• WE’RE EXPECTED TO DO IT BETTER
WHAT DID WE HEAR FROM OUR GRANTEES?
Action Learning Project Overview - RAPID PROTOTYPING
WHEN IS IT COLLECTIVE IMPACT?

“We Will Sell No Wine Before It’s Time”
“In God we trust, all others must bring data.”

W. Edwards Deming
SNAP BACK IS A FORCE TO BE RECKONED WITH
Lessons Learned
• United Way of the Greater Lehigh Valley
• Over 700,000 people in urban, suburban, and rural communities
• Shift from Allocations to Impact 10 years ago
• Recently named a Center of Excellence by United Way Worldwide
• Collective Impact initiatives we support:
  • Lehigh Valley Reads (United Way is backbone)
  • Alliance on Aging (United Way is backbone)
  • Food Policy Council (external organization is backbone, we support)
  • Collective Impact Community Capacity Building (Stone Soup Makers)
Grantee/Partner Feedback That Informed Our Action Learning Project

• Most common suggestions for what UWGLV could do to **improve their openness practice**: 
  • more diverse perspectives 
  • more proactive and frequent progress updates

• Grantees and partners demonstrated variation in responses: 
  • **Community Engagement**: Demonstrates humility and honesty when sharing power and ownership with grantees and community members (1.5 variation) 
  • **DEI**: Actively accepts and respects all participants, ensuring diverse individuals are able to participate fully in the decision-making processes within an organization or group (1.5 variation)

• Follow-up session in person with grantees completing the survey 
  • CI should be built from the bottom up. Our participants felt UW took a more “top down” approach, building plans then inviting agencies to engage 
  • Respondents also felt that funding projects instead of programs was inconsistent with CI principles. “All my programs connect together through a strategy. Focus on programs doesn’t lead to openness”
Action Learning Project Overview

Based on the survey responses: we agreed to work on

- More frequent touchpoints with agencies
- More diverse perspectives
- DEI that starts at home: board, staff, community leadership
- Building strategy alongside our partners, less “top-down”

Steps taken

- Community Engagement and Outreach Activities:
  - worked very closely with current funded partners in strategy-build of new plan
  - via Town Halls and 1:1 meetings we’ve engaged brand new partners
  - Non-profits
  - Community institutions (colleges, libraries, chambers)
  - Legislative offices, especially local elected officials
- Launched an ad-hoc Equity Committee
  - Internal policy, practice and External actions, including:
    - Added a non-discrimination clause for (ourselves and) partner organizations
    - leadership circles for professionals of color (led by external partner)
    - training for non-profit leaders (staff and board) on addressing diversity and equity.
Lessons Learned

• More can be done to engage community
  • We are sold on WHY, need more practical ideas on HOW
  • We know we need to continue more frequent communication touchpoints with grantees
  • We know we should continue striving toward bottom-up strategic planning, involving partners
• Our biggest challenge is how to engage community residents
  • Reminded of this by our partners (via COP survey)
  • Learned of some ways to do this from COP community (e.g. Hancock County)
Lessons Learned (2)

• Strategically, some grantees are now talking about moving away from “program funding” to larger project grants in CI. (feedback from in-person sessions).
  • We’re not fully there, but we’ve taken the step of funding more convening work (that we used to do in-house).
  • We are still looking for a new way of doing business a la Collective Impact
  • Working with other funders for good ways to go about this: e.g. Rider Pool & Rapid Prototyping
Lessons Learned (3)

- Equity is an ongoing process
  - Learning from UW of Greater Triangle for ways to learn about funder bias
  - Re-tooling our DEI workshops based on how the first year went (e.g. non-receptive board members following the first series)
Lessons Learned (4)

- Influencing funder peers is tough, but doable.
  - Model importance of openness by going first!
  - Offer practical and tactical ideas and suggestions for change
  - Meet people where they are
Ignite Presentation: United Way of the Greater Triangle

An Initiative of FSG and Aspen Institute Forum for Community Solutions
95/100 in social mobility
### Feedback on diversity, equity, and inclusion

#### Level of importance of each funder openness practice in helping achieve your goals

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<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
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#### Funder’s effectiveness in pursuing each openness practice

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Source: The United Way of the Greater Triangle’s Funder Openness Grantee/Partner Survey, December 2016. N=46 respondents. Respondents that selected "I don’t know / not sure” are excluded from the above analysis. Notes: 1) Weighted average calculated by giving 1 point to “not at all…” – and up to 7 points for “very…” responses – and then dividing the total weighted sum by number of respondents.
Respondents’ race and gender

**Race / ethnicity**

- White: 36
- African American: 2
- Hispanic or Latino: 2
- Native American: 2
- Asian: 1
- African: 0
- Asian American: 0
- Native Hawaiian or Pacific Islander: 0
- Two or more races: 0
- Choose not to disclose: 3

**Gender**

- Female: 34
- Male: 10
- Transgender: 0
- Gender nonconforming: 1
- Genderqueer: 0
- Choose not to disclose: 1

Typical Collective Impact table

• From your grantee/partner surveys
• From any other research/conversations that have informed your projects
People of color as non-profit leaders
Is the current portfolio of UWGT partners representative of the general human services, non-profit community?
*Other represents 1 Asian Female, 1 Hispanic Male, 1 Hispanic Female, and 1 Indian Female.
What disparities stand out to you?
What are we going to do with what we’ve learned?
What does this mean for collective impact?