Funder Openness Action Learning Lab Reflection

The Rider-Pool Foundation

PROJECT OVERVIEW: What were the primary activities of your action learning project?

- Rapid Prototyping:
  - Supporting the development of cross-sector partnerships through small, flexible readiness grants with agreed upon milestones before making the large, multi-year implementation grant
  - Funder as a partner in Collective Impact with a focus on early stages of cross-sector partnership development.

FINDINGS: What were the key takeaways or lessons learned from your action learning project?

- Many organizations find themselves “stuck” in their efforts to address complex social issues. Our capacity building efforts seem to be making a difference, helping groups get “unstuck”
- If an initiative is going to fail, it can fail fast and we can learn from it.
- There’s value in taking the time to analyze and understand data (ready and aim) before reacting to issues (fire)
- Allowing data to drive the process requires:
  - Access to good systemic data
  - Ability to share data across systems
  - Trust in Community Commons and its partners
  - Understanding how to use/analyze data for something other than demonstrating need in a proposal
- This is labor-intensive work that takes a lot of time on the funder’s part, as well as with the service providers
- For many of our partners, this is a radically different way to address complex social issues. Good leadership is important
- Snapback and other external forces are very powerful
- Passion and desire to do good is not enough
- We need to find better ways of using our time. There’s a tendency to rely on monthly, face-to-face meetings to get things done

OPEN QUESTIONS: What are the biggest unanswered questions from your action learning project that you want to discuss with your funder peers on Sept. 27-28?

- How do we engage other funders in this work? What happens when a partnership has done the initial work to develop a strong cross-sector partnership and is ready for implementation?
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Institute of Mental Hygiene

PROJECT OVERVIEW: What were the primary activities of your action learning project?

- Engage our Board around openness and transparency
- Review findings of the Survey with our Board
- Work with the Board to develop and implement strategies to act on feedback received from grantees and the community
- Initiate a process of inviting grantees to Board meetings to make presentations and ask direct questions about IMH’s funding priorities

FINDINGS: What were the key takeaways or lessons learned from your action learning project?

- Grantees directly involved in the collective impact initiative perceived IMH as more open and transparent than those that were not involved
- All grantees would like more info on IMH’s funding priorities and rationale
- Grantees made many suggestions to increase the flow of communication between IMH and grantees or potential grantees

OPEN QUESTIONS: What are the biggest unanswered questions from your action learning project that you want to discuss with your funder peers on Sept. 27-28?

- We would like feedback from other cohort members on other effective strategies for communicating with grantees or potential grantees without disclosing too much information
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Robert R. McCormick Foundation

PROJECT OVERVIEW: What were the primary activities of your action learning project?

We proposed 2 activities: To hold open forums for organizations that have passed our LOI stage (and returning applicants) to be more transparent with our application process, and to set up advisory committees in our 2 place-based communities to inform us on our fundraising and grant-making strategies. Due to shifts within our Program we only followed through on the 2nd idea. Here’s a bit more information and the primary activities to date:

- Each of our place-based communities created a “Quality of Life” plan to determine community assets and challenges, along with strategies to address the challenges. We supported that work, and will now use advisory groups in both communities to make grant recommendations to our executives and board in support of Quality of Life strategies.
- The advisory committees are made up of local residents and stakeholders who are leading the subcommittees that were formed to implement the Q of L plans. (Each Q of L addresses several issues, such as housing, education, employment, etc. Subcommittee chairs will participate in these advisory groups.)
- Activities to Date: Several meetings in both communities to share the concept and work through details. McCormick board approval of the committees. We are now meeting with the communities to discuss grant application criteria and fundraising tactics. We anticipate raising up to $200k in both communities by year’s end, which will be matched by McCormick at 50 cents on the dollar. We plan making our first round of grants, advised by these committees, by early 2018.

FINDINGS: What were the key takeaways or lessons learned from your action learning project?

- Nothing moves quickly in philanthropy. A great deal of relationship building had to take place before the communities got to the point where they were ready to buy into such a close partnership with a downtown foundation led mostly by white men.
- Process is important. Sharing the concept was relatively easy. Things became much more difficult as we began sharing the roles of committee members, grant criteria, fundraising tactics, etc. But those long, hard, process-oriented conversations are helping build our trust of each other, are making all of us accountable, and are giving us clarity about roles, purpose and objectives.
- People are very attached to the “brands” of their agencies. We have had a lot of conversations about logos, tag lines, etc – and everyone seems motivated to get recognition for their organizations. These conversations have been among the most difficult.
- Cultural competency is extremely important. We remind ourselves every day that we are visitors to these communities, and have placed high importance on valuing their voice and input. Our foundation has been participating in race equity training for 2 years. But we still have a ways to go before we are seen as a sincere ally who will be in it for the long haul.
OPEN QUESTIONS: What are the biggest unanswered questions from your action learning project that you want to discuss with your funder peers on Sept. 27-28?

- We would love some counsel on community engagement. We have the reputation of being a conservative funder; one that has been disconnected from the communities we support. We have made progress on this, but there’s still more we can learn about authentic community engagement.
- Some thoughts about local fundraising would be helpful. We know how to raise money from white middle and upper class people. We now want to diversify our funding base by reaching out to people of color.
- Thoughts on how to work with/facilitate local advisory committees would also be helpful, as well as thoughts on how to structure these committees. We just have the skeleton in place; we need to work with these communities to put some flesh on the bones.
The Findlay-Hancock County Community Foundation

PROJECT OVERVIEW: What were the primary activities of your action learning project?

- Conducting Community Conversations to various demographics in Hancock County. Let the community speak to us about their aspirations for Hancock County and what they thought was keeping us from reaching those aspirations or what we need to get there. Specific outreach was done to solicit involvement from unheard and under-heard voices.
- We held 70 conversations involving 602 people and distributed 1 survey with 456 responses. Overall, we heard from 1,058 residents.
- Both UW and TCF will use the data to discuss the prioritization of our grant making activities.

FINDINGS: What were the key takeaways or lessons learned from your action learning project?

- Key Hancock County community issues fell into categories that initiatives are currently working on.
- More communication is needed on action currently taking place.
- Clear trust issues with local government evidenced by trends in the responses to specific questions.
- Participants did not expect trained volunteers to share solutions or current activities; however agency staff conducting were asked many more questions. It was important to go over ground rules and share that we were there to listen and guide, not turn their conversation into a meeting.
- Our conscious effort to include unheard/under-heard voices was successful in several ways evidenced by hearing from a representational group as far as race/ethnicity, marital status, and most age/income levels.
- Recognition of how much the many segments in our community have in common. We realize how beneficial it would be for us to focus on what unites our community instead of what divides us. Across the subsections of our community, there is much agreement on what matters most.
- There is significant trust in us to take action on what we heard from the residents. We feel a tremendous sense of responsibility to move forward with the thoughts and opinions shared with us.

LESSONS LEARNED:

- We need a more complete set expectations for who will be doing each task between UW and TCF.
- In order to reach our goal in a timely manner, we need outcomes and expectations with regular benchmarks. The time frame ended up being much more compressed than expected.
- We need a version of our process specifically designed for those under 12.
- We thought people would be anxious to talk; when actually we had to initiate most of the meetings.
- Find a calendar we can share between organizations; not just a google doc or a main calendar in one agency.
- We need to do better hearing from individuals 12 and under, males, those without a college education, and individuals who earn below $25,000/year.
OPEN QUESTIONS: What are the **biggest unanswered questions** from your action learning project that you want to discuss with your funder peers on Sept. 27-28?

- Now that we know the key issues, should we continue with some type of public forums on each of those issues, look at what has been happening with those key issues and find additional ways to share that information, see if there is a tie in with the key issues and address them together as one project.

- Are we extrapolating the information gathered in the best way possible? We are doing general theming but nothing by demographic. What 3rd party options exist to help with the compilation and evaluation of data?
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United Way of the Greater Triangle

PROJECT OVERVIEW: What were the primary activities of your action learning project?

This project set out to answer the question: Is the current portfolio of UWGT partners representative of the general human services, non-profit community?

We decided to initially focus one county within UWGT’s four county impact area. Using available IRS data, we were able to create a general list of 501c(3) agencies from service sectors connected to UWGT’s organizational goals. Analysis included gender and race at the leadership level. Including organizational age, assets and revenues made for a more full profile to be used in comparison and correlation making. Profiles were created for 103 non-profit organizations in Orange County.

FINDINGS: What were the key takeaways or lessons learned from your action learning project?

- Though a small sample size, the analysis shows that the UWGT portfolio is close to representative of the greater non-profit community in Orange County.
- There are striking disparities along racial and gender lines when it comes to leadership and organizational revenue and assets in the general non-profit community in Orange County.
- Our Collective Impact initiatives in Orange County want to use this data to help inform their initiative’s growth strategies.
- We need to continue with a regional analysis in order to inform UWGT future grant making practices.

OPEN QUESTIONS: What are the biggest unanswered questions from your action learning project that you want to discuss with your funder peers on Sept. 27-28?

- What is the best way to use this data to influence grant making and collaborative growth?
- How have non-profit communities used this type of analysis?
- What are the best ways to share and distribute this information to the community?
- What roles do funders have in addressing disparities highlighted in the data?
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Ontario Trillium Foundation

PROJECT OVERVIEW: What were the primary activities of your action learning project?

- Implement a grantee survey
- Implement targeted capacity building opportunities based on feedback from the survey
- Increase opportunities for grantees to learn from each other

FINDINGS: What were the key takeaways or lessons learned from your action learning project?

- 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.
- When the issue is community driven, partnerships are easily made.
- 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.

What can OTF do to better support Collective Impact grantees?

- Develop and offer capacity building and learning opportunities around key topics:
  o Community Engagement
  o Communication Strategy
  o Creating Shared Measurement
- Create co-learning opportunities to allow grantees to learn from each other.
- Develop an effective way to communicate not only between OTF and lead organizations, but also with collective partners.

OPEN QUESTIONS: What are the biggest unanswered questions from your action learning project that you want to discuss with your funder peers on Sept. 27-28?

- What are some effective strategies that others have used to move collectives from cooperating to truly utilizing the collective impact approach?
- What type of capacity building or support have you provided to help collectives effectively engage community / people affected by the issue / people with lived experience in the initiative?
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United Way of the Greater Lehigh Valley

PROJECT OVERVIEW: What were the primary activities of your action learning project?

- Launched an ad-hoc Equity Committee through the year, looking at our own org policies first, with intention of expanding the work to the non-profit community. Early activities include: adding a non-discrimination clause for partner organizations; leadership circles for professionals of color; training for non-profit leaders (staff and board) on addressing diversity and equity.

- Community Engagement and Outreach Activities: we designed Phase II of our 2014-2022 Investment Plan (a 2018-22 four year plan), and worked very closely with current funded partners, through a series of meetings, on process improvement. In addition, we engaged via Town Halls and 1:1 meetings brand new partners. Staff and board leaders alike attended these sessions. We further engaged area legislators throughout the process, through office visits, community events, and in the Town Halls.

FINDINGS: What were the key takeaways or lessons learned from your action learning project?

- Equity work. Parts of our non-profit community is ready, but significant barriers still remain; developing an understanding of why this work is important will be a challenge for some non-profit (especially board) leaders.

- Community engagement. Identification of key community issues and strategies, including some that we do not directly address, and know that are pressing in our community: human trafficking, opioid abuse, mental/behavioral health support. We’ve identified through the entire process the importance of advocacy and policy in order to reach any of our common goals. This came out at Town Halls, at funded partner roundtables, and when speaking with non-profit leadership (staff and board members).

OPEN QUESTIONS: What are the biggest unanswered questions from your action learning project that you want to discuss with your funder peers on Sept. 27-28?

- We engage community residents in our direct work (e.g. parent/family engagement practices at community schools, senior fair outreach reaching hundreds of older adults annually). This engagement is done as outreach, to let the community know what resources are available to them. We do not engage with residents as much as a funding organization. Our question, then is: how can we bring residents into the process community assessment to the degree that we do the same with our non-profit community? What is the right mix or balance of engagement? Is this best done through public meetings, inviting residents to be on committees, or another way entirely? We want to continue to share experiences and hear what other funders are doing in this area.

- What is the right funding model for collective impact?
- What is the right funding model for DEI?