



**WORKING WITH GRANTEES:
PATHWAYS
TO SUCCESS**

*Southern California Grantmakers
2010 Annual Conference and Members' Meeting*

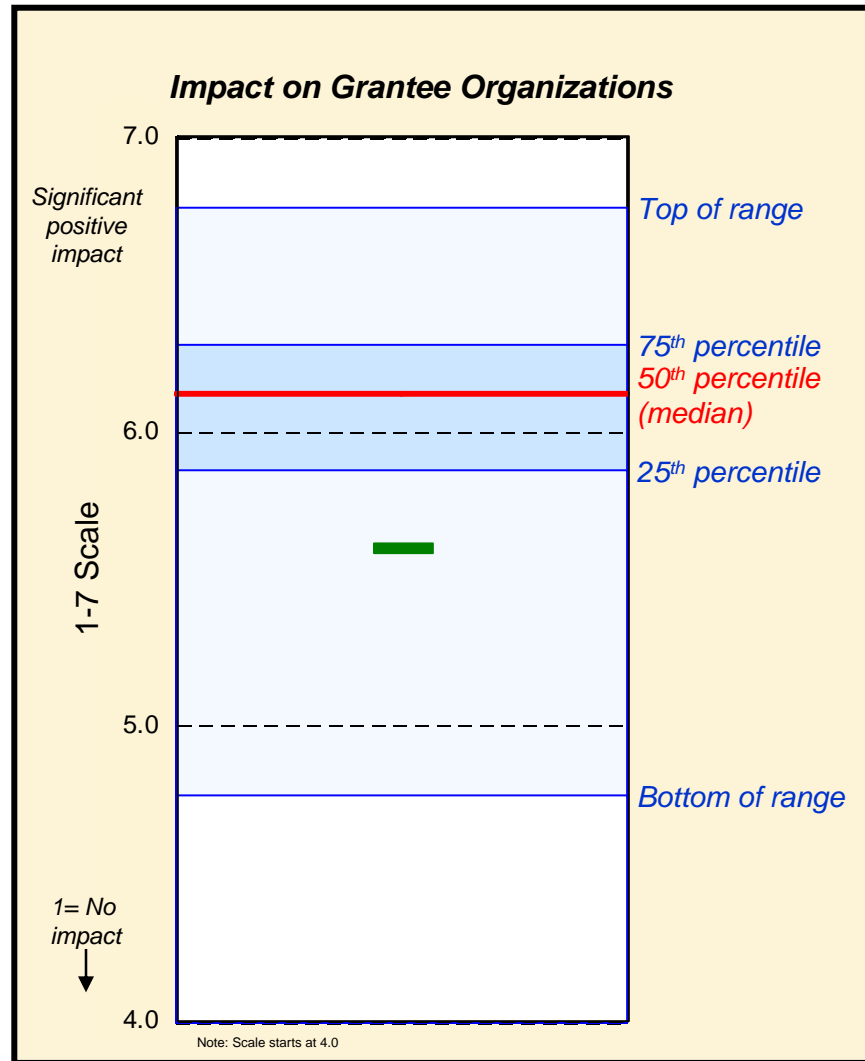




About CEP

The mission of the Center for Effective Philanthropy is to provide data and create insight so philanthropic funders can better **DEFINE, ASSESS, and IMPROVE THEIR EFFECTIVENESS AND IMPACT.**

Impact on Grantee Organizations



Relationships Measure

INTERACTIONS

**Fairness of treatment
by foundation**

**Comfort approaching
foundation if a
problem arises**

**Responsiveness of
foundation staff**

**Clarity of
communication of
foundation's goals
and strategy**

**Consistency of
information provided
by different
communications**

COMMUNICATIONS

Methodology

» Grantee Survey Data

- Number of Grantees: 29,071
- Number of Foundations: 175

» Program Officer Interviews with Five Exemplars

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Key Findings

UNDERSTANDING

- Understanding of funded organizations' goals and strategies

SELECTION

- Helpfulness of selection process
- Mitigation of pressure to modify priorities

EXPERTISE


- Understanding of the field
- Understanding of the community

CONTACT

- Initiation of contact
- Appropriate frequency of contact



**STRONG
RELATIONSHIPS**



“At the very basic level, solid relationships are critically important because grantees are a very good source of information for us. They are the ones doing the on-the-ground work. They’re likely to have a much more nuanced and deeper understanding of the work that needs to be done in the particular places that we care about.

If we have high-quality, long-term, trust-based relationships with grantees, we believe that we’ll have better knowledge around which we can make smart investments. . . .”

– Paul Beaudet, Wilburforce Foundation

Discussion:

Understanding Goals and Strategies

- » How well do you understand the goals and strategies of the nonprofits you fund?
 - How do you gain that understanding?
 - What would allow you to understand those organizations better?

Discussion: Selection Process

- » **How do you think your work with grantees during the selection process helps or hinders their organizations or the work for which they are seeking funding?**
 - Do you view the selection process as an opportunity to help strengthen grantees' organizations and their work?

- » **Are you aware of when you are pressuring grantees to modify their priorities in order to receive funding?**
 - Is the power dynamic between funders and grantees something you are cognizant of when interactions with grantees? Is it ever discussed at your foundation?

Discussion: Expertise

- » **How well do you understand the communities or fields of the grantees with which you work?**
 - How could you update or improve your field of community expertise?
 - How could you use this expertise to benefit both grantees and the foundation in their efforts?

Discussion: Contact

- » **What determines how often you are in contact with grantees?**
 - Does the level of contact you have with each grantee make sense given the particular grantee organization, goals of that grant, and the role that you play for that grant?

- » **Do you recognize whether your grantees are reaching out to you more than you are reaching out to them?**
 - For what reasons, or in what situations, might it be important for you to initiate more contact with your grantees?