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Executive Summary

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RESULTS

06 The Impact Grants Initiative: Community-Participatory Grantmaking Modeled on Venture Philanthropy

Adin C. Miller, M.P.A., Elisa Gollub, Ph.D., Ilana Kaufman, M.A., and Adina Danzig Epelman, M.A., Jewish Community Federation and Endowment Fund

Building on the concepts of venture philanthropy, the Jewish Community Federation and Endowment Fund launched the Impact Grants Initiative, a model that offers high engagement opportunities for donors and identifies high-performing nonprofits. This article describes how the JCF staff and community leaders created this new tactic to harness people's time and talents, and to attract younger donors interested in participating in meaningful grantmaking. Funders looking to heighten community participation in grantmaking efforts are encouraged to consider the approach.

DOI: 10.9707/1944-5660.1208

22 Ripple Effects of Process Change

Rebekah Usatin, M.P.A., Nancy Herzog, M.A., and Myriam Fizazi-Hawkins, M.A., National Endowment for Democracy

Decisions to change processes in one area have the potential to cause ripples throughout the entire grantmaking process, impacting both donor and grantee. This article describes how the National Endowment for Democracy began a change in its grantee-evaluation process that affected how grants were recommended for renewal. What resulted was a shift from requiring grantees to self-evaluate projects at the conclusion of each project to evaluating the cumulative impact of grants on their longer-term objectives over the course of several grants.

DOI: 10.9707/1944-5660.1209

TOOLS

36 Using a Priority Grid as a Tool for Shaping Strategy and Building Impact

Lori Fuller, M.S.W., M.B.A., Kate B. Reynolds Charitable Trust

Once a foundation chooses a strategy, how can it put that strategy into everyday practice? This article describes the priority grid – an analytic tool to assess grant proposals – and how it has fundamentally changed and improved the work of the Kate B. Reynolds Charitable Trust. Developed by the Trust, the priority grid focuses staff attention on key strategic elements.

TOOLS

Applications have increased in quality and alignment with foundation strategy, and staff recommendations to approve or decline applications have fallen more in line with the grid.

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- 48** Climbing the Mountain: An Approach to Planning and Evaluating Public-Policy Advocacy
Sam Gill, M.Phil., and Tom Freedman, J.D., Freedman Consulting LLC

One challenge to the rise of outcome-oriented philanthropy is the question of how most effectively to plan, support, and evaluate public-policy advocacy. This article proposes a new methodology designed around a series of stages, each with a different set of strategic planning and assessment requirements. This approach urges a mixture of targeted quantitative and qualitative insights and is based on the authors' direct experience working with both policy processes and a wide range of foundations and nonprofits that have invested in public-policy advocacy.

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- 60** Financial Analysis for Measuring and Comparing Risk in Grantmaking Portfolios
Shena Ashley, Ph.D., Syracuse University, and Lewis Faulk, Ph.D., American University

Managing risk is one of the key functions in philanthropic grantmaking. This article describes a tool to evaluate the levels of risk that foundations maintain through their grant portfolios. The authors create an index of aggregated risk at the portfolio level using several financial indicators based on theory and literature. They then test it on a sample of foundations and their grantees in the state of Georgia. Practitioners and researchers can use this practical, financial-based index to evaluate risk in a variety of contexts and for a variety of research questions.

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REFLECTIVE PRACTICE

69 In Other Words, the Budgets Are Fake: Why One Funder Eliminated Grantee Budgets to Improve Financial Due Diligence

Molly Schultz Hafid, M.P.A., Unitarian Universalist Veatch Program, and Carol Cantwell, Fun With Financials

This article provides a case study in how to engage board and staff members in the development of a new standard for reviewing financial information. The Unitarian Universalist Veatch Program at Shelter Rock eliminated budgets from its application requirements. The authors provide an overview of the process, timeline, and tools used to replace funder budgets with a more accurate review that provided more relevant insight into grantee financial health based on actual financial data.

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