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VOL. 7 ISSUE 1

RESULTS

6 Use of Consultants by U.S. Foundations: Results of a Foundation Center Survey

Lawrence T. McGill, Ph.D., Brenda L. Henry-Sanchez, Ph.D., David Wolcheck, B.A., and Sarah Reibstein, B.A., Foundation Center

While we've known for years that foundations use consultants to support various aspects of their work, we've never had a quantitative picture of how many, how often, and for what purposes. This article presents the results of a survey done in collaboration with National Network of Consultants to Grantmakers to examine use of consultants by community, corporate, and independent foundations whose annual giving totals at least \$100,000. The survey found that while frequency of consultant use rises dramatically as foundation size increases, there are no major differences in frequency by foundation type.

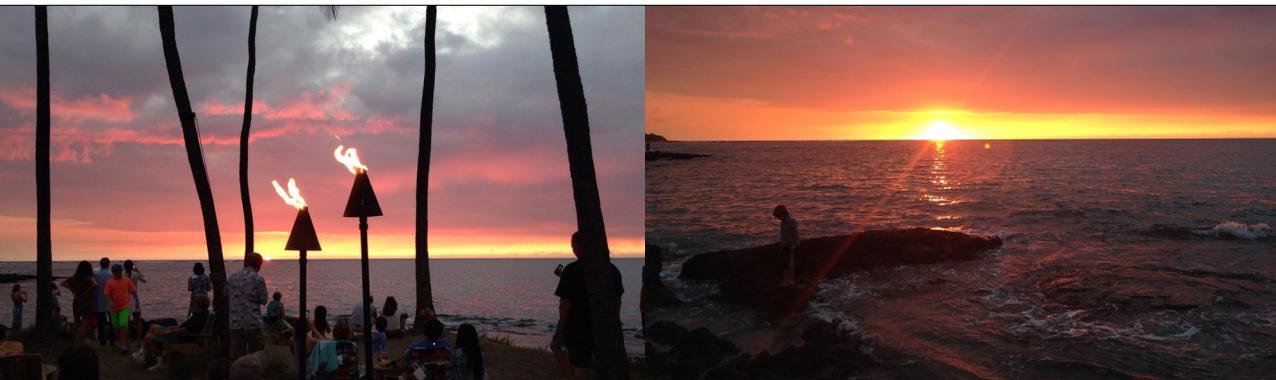
DOI: 10.9707/1944-5660.1231

19 The Family Foundation Life Cycle and the Role of Consultants

Melissa L. Nemon, Ph.D., and Claudia J. Jacobs, M.S.W., Brandeis University, and Mary Phillips, M.S., and Judy Sneath, M.B.A., GMA Foundations

The dynamics unique to family foundations, including a dedication to preserving a legacy and to sharing decision-making among family members, are often a significant influence on a foundation's governance and operations and may extend to how their experiences with consultants differ from those of other foundations or nonprofits. This article looks at common experiences that lead family foundation to seek external help and how these foundations can learn from the experiences of their peers. The authors introduce the Family Foundation Life Cycle as a lens for understanding the stages of operations and provide a Family Foundation/Consultant Guide.

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TOOLS

33 Understanding Philanthropy Consulting: A Tool to Identify the Roles and Capabilities Needed From External Support

Brian Leslie, M.B.A., Kelsey Noonan, B.A., and Clint Nohavec, M.B.A., SwitchPoint LLC

The philanthropy consulting sector has evolved rapidly in the past decade. Philanthropies face increasingly complex strategic challenges and are engaging consultants to play a more diverse set of roles in a broader range of assignments. In this article, the authors categorize the distinct roles played by philanthropy consultants and present a tool and framework for charitable foundations to identify and evaluate the roles and capabilities they need from those consultants. The result is a better decision-making process.

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45 How to Implement a Funder-Supported Advocacy Effort and the Integral Role of Policy Consultants

Deena Margolis, M.P.A., Focali Consulting LLC; and Leah M. Ersoylu, Ph.D., Ersoylu Consulting

Over the past decade, there has been growing recognition in the philanthropic field that advocacy can be a powerful tool for funders to effect systemic change within the communities where they invest programmatically. This article details the key considerations for preparing and launching a successful advocacy effort, as well as specific tools that can help foundations and their grantees make the best use of an external policy consultant.

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SECTOR

56 Both Sides of the Equation

Barbara D. Kibbe, J.D., S. D. Bechtel, Jr. Foundation

Client and consultant can have fundamentally different perspectives on the progress and success of a consulting engagement. This article explores the insights and lessons learned by a dozen professionals who have been on both sides of the equation in consulting to philanthropy. It boils down to this: Consultants need to be better consultants and foundations need to be better clients.

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71 Effective Consulting Partnerships to Philanthropy

Ellen Irie, M.P.H., Kim Ammann Howard, Ph.D., and Ria Sengupta Bhatt, M.P.P., Informing Change; Naomi Orensten, Ed.M., Center for Effective Philanthropy

The problems our society faces today are too great in number, depth, and complexity for any one organization to tackle alone. As a result, partnerships are formed. This article explores an often-overlooked aspect of working with consultants in philanthropy – the partnerships among the consultants themselves. The authors aim to provide a framework for thinking about and engaging in consulting partnerships in the field of philanthropy.

DOI: 10.9707/1944-5660.1236

82 Balancing Content and Process Expertise in the Practice of Foundation Consulting

Christopher Cardona, Ph.D., TCC Group

Despite foundations' frequent recourse to consultants, little, if anything, has been written on the expertise required of foundation consultants and how they cultivate it. This article looks at the types of expertise that these consultants bring to their work and for which their clients hire them. The author offers examples of how content, process, and/or hybrid expertise might combine to address particular foundation needs, and incorporates the perspectives of 12 consultants to philanthropy, ranging from solo practitioners to members of large firms.

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REFLECTIVE PRACTICE

98 Shine a Light: The Role of Consultants in Fostering a Learning Culture at Foundations

Jared Raynor, M.S., Ashley Blanchard, M.P.P., and Marieke Spence, M.A.L.D., TCC Group

Noticeably absent on the list of reasons foundations cite for engaging consultants is learning – a particularly important attribute for foundations that grapple with complex issues in dynamic environments. This article proposes that being explicit about the value of fostering a learning culture in a foundation within the context of any consulting engagement will enable both parties to more proactively strive for and achieve learning results. The authors' analysis uses this premise as a jumping-off point to deeper exploration of the myriad ways – some simple, some complex - that consultants help foundations cultivate a learning mindset.

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113 Going Beyond Grantmaking: Using External Help to Extend a Foundation's Core Competencies and Increase Its Impact

Gwen Walden, M.A., Lauren Marra, M.P.P., and Katrina Briddell, M.T.S., Arabella Advisors

The drive to achieve impact beyond grantmaking represents a paradigm shift in the way foundations seek to make social change. This article presents three cases: incubating and launching a new organization, effectively deploying impact investments, and collaborating to advocate for policy change. Using these cases and other experience as a reference base, the authors identify five ways funders can use consultants and other intermediaries to pursue impact beyond grantmaking, and explores several common pitfalls.

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REVIEWS

127 Review of *The Social Profit Handbook: The Essential Guide to Setting Goals, Assessing Outcomes, and Achieving Success for Mission-Driven Organizations*

Review by Paul G. Putman, Ph.D., Cleveland Foundation

The Social Profit Handbook carries the subtitle *The Essential Guide to Setting Goals, Assessing Outcomes, and Achieving Success for Mission-Driven Organizations*. Putnam wishes the author had skipped the main title and simply used the subtitle. This book is more aptly described as a guide as it takes you through a series of exercises as though you were attending a facilitated workshop. At its core, this is a book about assessment in the nonprofit/third sector written for executive directors, board members, staff members, and foundation officers who want to do better but have found traditional assessment methodology inaccessible or inadequate. A bonus foot-long bookshelf appears in the appendix.

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