2009 PO Retreat

What do you hope to talk about today?

1. Response to economic downturn
2. How are CFs dealing with the drop of assets. Especially looking ahead to 2010.
3. How are people dealing with endowments underwater?
4. Any changes in multi-year grants
5. Are you working with agencies differently
6. Rethinking operating grants, how to put them into play
7. Human resource grants
8. Local and staff strategies for grantees
9. PRI, spending policies

Grantmaking

- Sustainability
  - we care more now about how to help agencies become stronger
  - help them with development strategy
  - collaboration among non-profits
  - Mergers and consolidation
  - CF does not want to fund an organization that will no longer be around in 6 months

- Capacity Building
  - CF bringing training resources into the community for nonprofits: Board Source, ZingTrain, etc.
  - Establishing a mini-fund for capacity building

- Basic Needs
  - CFs serving as the convener or host of the basic needs / human service funding that is happening in the community
  - Using a shorter more streamlined application process for the basic needs grants
  - Grand Rapids is turning around these grant requests in 48 hours by using email communication and a conference call for funding approval if the request is under $15,000

- Encourage nonprofits to look to other funding streams
  - Federal government (Midland shared a story about a NP getting funding from the Department of Agriculture)

- CF is playing a more hands on role in helping grantees find additional resources

- Not spending all of the spendable for this year out of fear for the budget in 2010
  - Some CFs are trying to spend less over the first 6 months in order to make sure there is money for the second half of the year.

    - Ann Arbor's goal is to have all of its unrestrictive grantmaking distributed by July 1

- Funder's Collaboratives are important tools for efficiency and effectiveness
    - Role-alike meetings for CEOs and Program Officers
    - These collaboratives include other foundations, United Way, city/county governments, anyone who gives away money
    - CF can play a role in convening these networks
    - These networks discuss common grant applications, collaborative funding efforts, and are prepared for joint response to community issues

- Increase in communication with donors
    - Educate donors about projected spendable for 2009, 2010, and 2011
    - Educate donors about the effects of spending from an underwater fund
    - Host a convening for Agency endowments to educate them about the same things as for donor advised fund holders

- For grantmaking…keep your eye on the ultimate goal of serving the clients, not on the salaries of the agency staff
    - We are funding outcomes, not agencies

CMF response to PO needs

- Stimulus package: need cheat sheets, speakers, and resources to help us understand what is available to CFs
- 2010 census call is a good example of useful information
- Regional initiatives sponsored by CMF have resulted in collaborative opportunities
- Help connect Program Officers around the state through technology: Twitter, Facebook, or LinkedIn
- Take the lead in demonstrating how technology can assist our organizations and our network
- Clearinghouse for best practices for philanthropy
- Technical assistance with the National Standards re-compliance process
- Opportunities for new staff members (Fundamentals 101)
- Share Diversity and Inclusion information strategically with POs
- Advanced Grantmaking courses: Grantmaking School with GVSU
- Multiple one day meetings during the year like today vs. overnight retreat
    - These could include issue specific conversations (like DAG)

Long-term approach to dealing with the economic downturn

- Implementing new (and unique) spending policies
    - Flint uses a floor and ceiling concept to ensure more stable spendable income is available

- Program Related Investments (PRI) and Mission Related Investments (MRI)
    - Flint considers their building PRI or MRI because it interfaces with its goal of revitalization of downtown and be part of downtown development

Community Leadership in this economy

- CFs are getting more involved in neighborhood grants and neighborhood funders forums

- More community leadership around the issue of foreclosures
    - CF for SE MI involved in forming an Office of Foreclosure Response

- As CFs are getting involved more and more with community leadership, it is important that we develop an exit strategy before agreeing to take the lead
    - CFs also need to learn how to say no