



## The Putnam Guide

# Responsive vs. Strategic Grantmaking: Exploring the Options

Prepared for the Ohio State Bar Foundation

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*“Responsive and strategic grantmaking each come with a set of pros and cons. Exploring and considering these can help clarify when one approach may be preferable to another, depending on a foundation’s overall mission and the goals it wishes to accomplish.”*

**G**rantmakers have many roles to play in a community, and how they define those roles can vary greatly. Some remain poised to respond quickly to immediate community needs as they arise. Others dig deeply into entrenched problems and make long-term commitments to addressing them.

In the field, there is much written about responsive and strategic approaches to philanthropy, and ongoing discussion about which approach is appropriate, meaningful, and effective. In truth, there will always be room for both approaches. This paper is provided as a resource to help foundations better understand responsive and strategic grantmaking, and to help foster conversation among foundation staffs and boards.

### **Responsive? Strategic? What Do They Mean for Grantmakers?**

**Responsive grantmaking** is being open to receiving proposals and ideas from any nonprofit, and allowing the nonprofits to drive the agenda. Requests are initiated by the nonprofit, rather than by a funder seeking them out. This doesn't mean that a foundation doesn't have core areas of focus, but that within those areas it wishes to be responsive to the needs nonprofits feel most keenly. For example, a funder may focus on substance abuse, but be open to supporting a wide range of prevention and treatment programs, as well as programs serving youth and



families to address multi-generational factors that lead to abuse.

Responsive grantmaking doesn't have to be completely passive. In Cleveland, the St. Luke's Foundation identified three program areas (healthy people, strong neighborhoods, resilient families) and defined very specific goals for each. While their grantmaking process is very open to receiving unsolicited proposals, they also proactively seek out and invite applications from nonprofits that might be a good fit.

The Moses Taylor Foundation, a new health conversion foundation in Scranton, Pennsylvania, intentionally planned for responsive grantmaking in its first several grantmaking cycles so that staff and board can learn more about the community and its needs (and the board can learn more about its role as a grantmaker). Eventually, the board will use its accumulated knowledge to decide whether to pursue strategic funding on certain issues.

In general, responsive grantmaking makes sense when a funder is just getting started – either as a new foundation or as an established foundation that is wading into a new issue area. Responsive grantmaking also can be a way to show support to the community when a funder is not interested, ready or able to put the required effort and resources into a strategic approach. Funders that intentionally want to remain open to a variety of ideas that emerge from the community often use a responsive approach. And for some foundations, responsive grantmaking is simply the best fit for their missions – particularly those whose missions are very broad and highly localized.

**Strategic grantmaking** (also called proactive grantmaking) is grantmaking with more focused goals, and a defined set of strategies for how a foundation wants to accomplish those goals. The funder drives the agenda rather than the grantees, although it is best to include grantees in the creation of the goals and strategies. Strategic funders typically see themselves as accountable for successful outcomes. For example, using the substance abuse example from above, a strategic grantmaker may decide

to focus on reducing the stigma of substance abuse, and deploy strategies that include a statewide communications campaign, increased support for AA and Alanon, and policy advocacy to health insurance providers to cover treatment.

Strategic philanthropy usually makes sense after a foundation has been funding responsively for a while and has learned a lot about a specific issue it can address strategically. It also makes sense for funders that are very clear in their mission or intent to make a difference in a specific area. And, for funders who find that making a variety of different grants is proving unsatisfactory in terms of demonstrating the results they desire, a strategic approach can be a way to achieve more measurable impact. In any case, funders who engage in strategic philanthropy should be ready to commit to their strategy for more than one or two grant cycles, and think in terms of 3-5 years instead.

The Cleveland Foundation adopted a strategic grantmaking approach for its MyCom youth-focused initiative. MyCom is a 20-year investment with a long-term outlook. In addition to funding, the foundation engaged with a team of nonprofits that serve as lead agencies and meet regularly. This ongoing communication allows nonprofit leaders to identify and discuss any emerging problems, community needs during regular monthly meetings, and collectively they can identify quick solutions to address them. Without this intense focus and regular communication, these problems could exacerbate before anyone has time to submit a proposal during a regular grant cycle and get funded. Often the solution doesn't require a grant, but rather a simple phone call or a change in a process.

Strategic grantmaking is often confused with or associated with the idea of being specifically focused, giving large multi-year grants, or pursuing a funder-generated idea or solution. While each of these may be an attribute of a strategic approach, they are not synonymous. Responsive grantmaking also can focus on a particular issue, include large and long-term grants, and be part of a funder-driven solution.



## A Look At Pros and Cons

Responsive and strategic grantmaking each come with a set of pros and cons. Exploring and considering these can help clarify when one approach may be preferable to another, depending on a foundation's overall mission and the goals it wishes to accomplish.

	RESPONSIVE GRANTMAKING	STRATEGIC GRANTMAKING
<b>Pros</b>	<ul style="list-style-type: none"><li>• Allows new ideas to come into the foundation</li><li>• Allows for rapid response to new needs</li><li>• Can support a wider range of issues and nonprofits</li><li>• Helps a foundation learn about its community</li><li>• Is easier in some ways, because it does not require a lot of planning or effort</li><li>• Provides nonprofits with greater opportunities for funding</li></ul>	<ul style="list-style-type: none"><li>• Improves likelihood of having an impact on a specific issue</li><li>• Has the ability to craft funding to utilize best practices or evidence based practices</li><li>• Builds deeper relationships and partnerships with grantees</li><li>• Provides greater opportunities for partnerships, collaboration with other funders</li><li>• Facilitates deeper learning about the target issue</li><li>• Can allow for rapid identification of new needs within the focus area</li><li>• Makes it easier to communicate about progress and accomplishments</li><li>• Signals the importance of an issue</li><li>• Can enhance reputation for the funder, or recognition for knowledge and impact in a particular issue area</li><li>• Greater ability to raise or leverage other funding</li><li>• Can take less time to respond to proposals, since strategic funders often invite specific organizations to apply</li></ul>
<b>Cons</b>	<ul style="list-style-type: none"><li>• Is less likely to make a deep impact in a specific area, because funding is widely dispersed</li><li>• Makes it more difficult to assess and describe what a funder has accomplished with its portfolio</li><li>• Is more likely that a funder will have to respond to a greater number of proposals</li></ul>	<ul style="list-style-type: none"><li>• Limits funding to specific areas, making a foundation less open to other emerging needs or new ideas</li><li>• Takes time and resources to conduct research, develop strategies, build relationships</li><li>• Makes it difficult to change direction</li></ul>



## Not Necessarily One Or The Other

Responsive and strategic philanthropy are not mutually exclusive. In fact, most funders employ a combination of both. For example, within a particular program area, a foundation may devote a portion of its portfolio to one strategic effort and the balance to responsive grants. For example, the Firelight Foundation, which is committed to support children with HIV in Africa, strategically invests in programs to increase HIV resources and knowledge, but reserves a portion of grants for grassroots nonprofits, because the Foundation believes that they know best what will work in their community.

Other funders may use responsive philanthropy to power a “learning phase” of their work, then use accumulated knowledge to develop a strategic grantmaking initiative for “phase two.”

And even the most strategic of funders can use responsive philanthropy to help change course or undergird a strategic investment. For example, a natural disaster or economic hardship in a community requires funders to respond to immediate needs. And within a strategic initiative, unanticipated challenges may surface that require responsive grantmaking, such as an unexpected gap in nonprofit capacity among organizations that are part of that initiative.

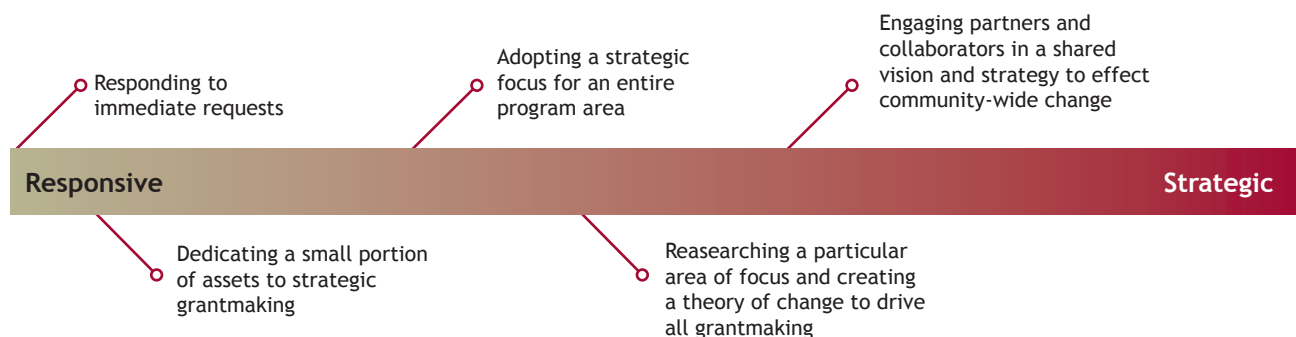
For example, in creating its strategic investments to build the field of domestic violence providers

in California, Blue Shield of California Foundation found that most domestic violence shelters had little or no capacity to think beyond day-to-day survival. The Foundation helped address this issue and improve capacity by providing general operating support grants to all shelters in its initiative so that they could worry less about keeping the doors open and lights on, and more about how to improve their capacity for networking, advocacy and sustainable financing.

It may help to think of responsive and strategic funding along a continuum, and recognize that a single funder can engage in multiple points along that continuum simultaneously.

In practice, the combination of strategic and responsive approaches with the continuum might look like one of the following four scenarios:

- A funder notices a number of unsolicited proposals in response to the same need, and builds off of its relationships with individual grantees to develop a new strategic initiative to address that need.
- A funder designates 20% of its grant budget to address a specific issue, and within that 20% allocates some funds for a strategic new initiative, and some funds for responsive grantmaking on that topic.
- A funder creates a new initiative with community partners, and intentionally provides regular opportunities for partners to





share emerging trends, concerns, needs and opportunities. The funder maintains a pool of responsive grantmaking funds to respond to issues identified by partners.

- A funder splits its grantmaking portfolio in half. It uses one half to respond to ongoing community requests for short-term support. For the other half, the foundation approach organizations of merit to request proposals for longer-term support to address a key issue (either together or separately), or to expand a promising program.

Of course, these are only a few examples. The possibilities for strategic grantmaking are limitless.

### Small But Mighty

The idea of becoming strategic may seem like a big undertaking, but strategic grantmaking is actually a highly effective approach for small foundations seeking to deliver the most community bang for their philanthropic buck.

Here are some examples:

- The Community Memorial Foundation in suburban Chicago, wishing to better understand demographic trends, commissioned a community study and documented increasing diversity and income inequality. They shared this information with local legislators, thereby filling a knowledge gap and helping to inform public policy as well as the foundation's own strategic grantmaking decisions.
- Seeing a gap in leadership capacity among mid-level nonprofit managers in the face of impending wave of nonprofit CEO turnover, another Chicago-area funder, the Pierce Family Foundation, created a "Top Talent Institute" program specifically to build the capacity, skills and network of the field. Each year, the program produces a cohort of 15-18 leaders who are prepared to assume the reins of area nonprofits when the time is right.
- As a program-related investment (PRI) strategy, the Norcross Wildlife Foundation in New York

offers 1-year, no-interest loans of up to \$250,000 to land trusts for the acquisition and permanent protection of wild land. More than 40 borrowers have protected 15,000 acres, and in some cases, just the offer of a loan was enough to convince land trust board members to donate funds for purchase themselves<sup>1</sup>.

- To create a lasting impact in its focus area of education, the Self Family Foundation in Greenwood, South Carolina, partnered with a local university a dozen years ago to create a Montessori teacher education program on the campus. Now, Montessori training is a core part of the university's curriculum and serves teachers from around the state, and the foundation has supported its ongoing recruiting and expansion efforts. The program has produced more than 150 teachers, most of whom teach in South Carolina schools.

In every case – whether strategic or responsive, large or small – grantmakers should deploy much more than financial assets. Ambassador Jim Joseph, former president of the Council on Foundations, identified five forms of capital that all foundations have and should deploy to the fullest extent possible<sup>2</sup>. These are:

1. **Social** – the networks and relationships that a foundation can leverage in support of its work.
2. **Moral** – the philanthropic values that the foundation holds and that allow it to speak with authenticity about social circumstances.
3. **Intellectual** – the knowledge, research, and other intellectual resources that foundation staff and trustees either hold or have access to and can share in community.
4. **Reputational** – the ability to lend credence and legitimacy to other organizations through your own support or acknowledgement.
5. **Financial** – includes much more than grantmaking dollars. Foundations can also be strategic by investing their assets in ways that can enhance community outcomes through vehicles such as mission-related investments or program-related investments. (Simply defined, mission-related investments are those in which a foundation's corpus is invested in companies

<sup>1</sup> "Twenty Ways to Make a Difference," Exponent Philanthropy, 2014 <https://community.exponentphilanthropy.org/ProductDetail?id=01t150000059mrWAAQ>

<sup>2</sup> <http://www.cof.org/content/beyond-grantmaking-reimagining-potential-community-foundation-its-second-century>



that enhance mission, such as an environmental funder investing in alternative energy companies. Program-related investments are investments of grant dollars in nonprofits for which a return is expected. An example might be an investment in a for-profit bakery run by a workforce development nonprofit as a training site.)

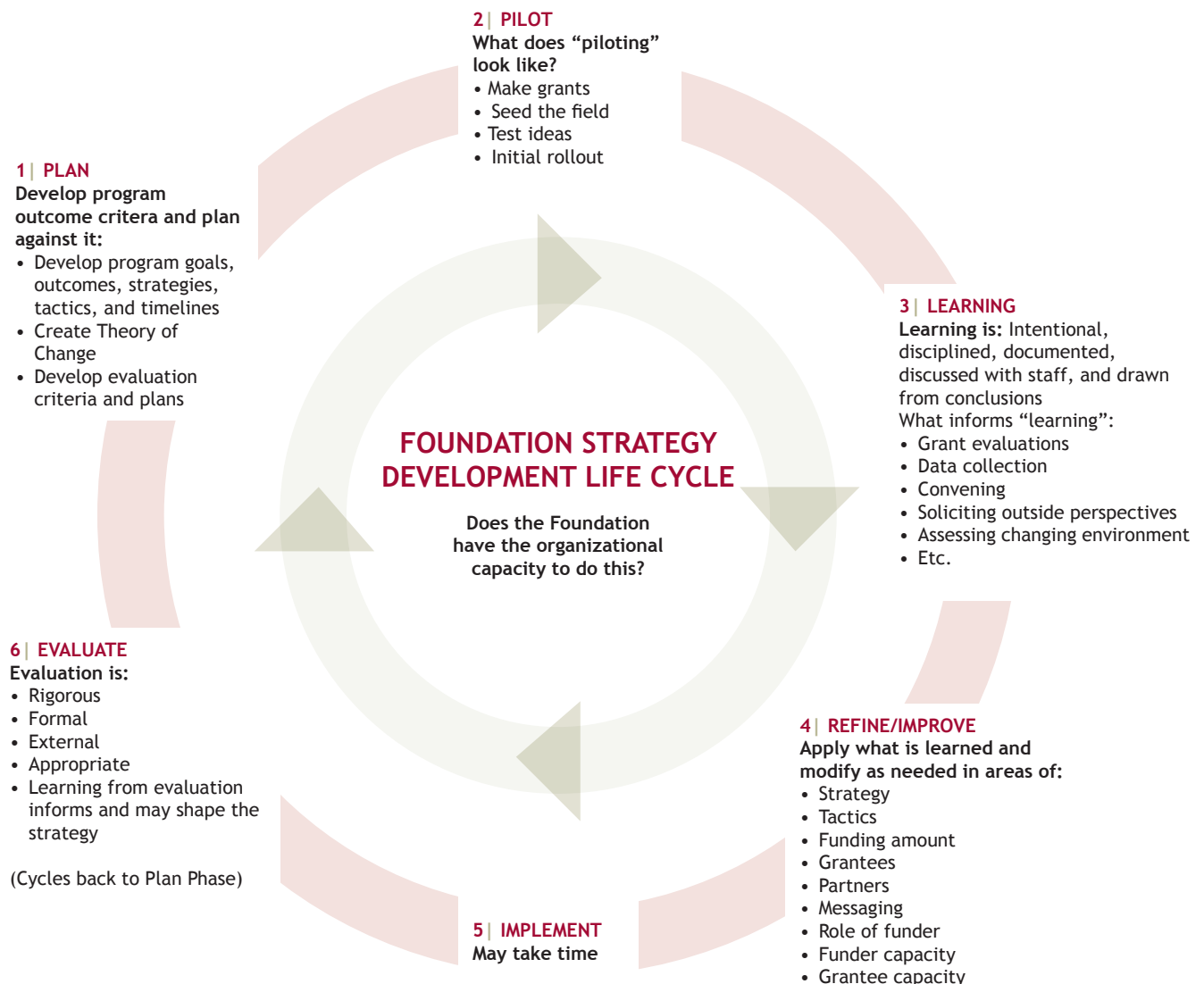
invest in a strategic approach are decisions that foundation leadership must weigh carefully.

Strategy development is an ongoing effort – a constant process of learning and refining through what we call the “strategy development lifecycle.”

### Shifting Toward a Strategic Approach

Incorporating a strategic approach to grantmaking isn’t something foundations can or should do overnight. Developing a strategy involves learning, planning, testing and cultivating support within the community. When, how, and how much to

This lifecycle illustration presents strategy development in multiple steps, but the process can apply to a small experimental strategic approach, or to a large-scale effort. In either case, the basic steps of planning, piloting, learning, refining/improving, implementing and evaluating are the same. And it can work in tandem with and be informed by a foundation’s concurrent responsive grantmaking.







## 10 Tips For Getting Started

Moving into strategic philanthropy can be intimidating. As the life cycle above demonstrates, there are many steps to take, questions to ask, and options to consider. But don't let the challenge lead to paralysis. Instead, keep these simple tips in mind:

1. **Don't be afraid of strategy.** The Center for Effective Philanthropy has written extensively about strategic and responsive grantmaking. Their research has uncovered many myths related to strategy in foundations, including strategy being dispassionate, too "business oriented," too limiting, or not allowing for course corrections. In fact, none of this is true. Funders who are most aware of the environment in which they operate have a vision for what they want to accomplish, and a road map to get there can be the most successful and adaptable.
2. **Don't worry about being unique, focus on being effective.** Foundations aren't competing with each other the way McDonald's and Burger King are. If a foundation down the street or across the country is achieving some amazing results, and if those results could be either enhanced or expanded in your community through strategic investment, why not join in?
3. **Start small.** If strategy is a new concept for your foundation, it's best not to jump in with both feet. If you seek to make too many changes too quickly, you risk being unsuccessful. For example, one prestigious and well-intentioned family foundation sought to move from being a generalist health and human services grantmaker to a strategic grantmaker with the help of a high profile consulting firm. Several years down the road the trustees determined they were not happy with the direction and abruptly pulled the plug — leaving staff, grantees, partners, and key initiatives hanging. It was unfortunate and could have been avoided if the foundation had adopted an incremental approach.
4. **Involve your staff, board and relevant stakeholders.** It is critical that both foundation leaders AND key stakeholders "own" the strategy. If they don't own it, they haven't bought into it, and they won't be successful in implementing it. This is not an area where you should cut corners, speed up the process,

## INTENTIONAL LEARNING IS ONGOING

When pursuing strategic grantmaking, foundation boards and leaders should regularly explore "learning questions," such as:

1. What are the top three things we have learned about our strategy thus far?
2. If we could do it all over again, what would we do differently?
3. What has surprised us? What are we seeing that is different than what we originally expected?
4. What progress are we making on our strategy overall?
5. What progress have we made on each of our short-term and long-term outcomes?
6. What are some of the early accomplishments/wins?
7. What has been the most challenging?
8. Are there areas where we have not yet made much progress?
9. What are the current conditions now compared to when the foundation launched this strategy, and how has/will that impact the work (e.g., policies, systems, other funding streams, staff changes, etc.)?
10. Have we made modifications or improvements to any aspect of our strategy, approach, or funding since this strategy was created (or since we started working at the foundation)? Has that helped?
11. At this time, do we anticipate making any modifications or improvements? By when will we make that decision?
12. What opportunities do we see with this strategy going forward?

or give lip service. Allow the time it takes to involve and engage people and make them believers. Surface concerns early and listen to their ideas and suggestions – then use those to inform your strategy development.

5. **Intentionally learn.** An effective strategy requires knowledge, and that knowledge comes from many sources – from academic research, to national experts, to local organizations who have a clear picture of what's happening on the ground in communities. Learning isn't hard to do, but it must be intentional, documented, discussed within your team, and it must lead



to decision making. It can't simply exist inside a program officer's head. One of our clients, the Kate B. Reynolds Charitable Trust, asks themselves, "What will make or break this grant?" when deciding whether to recommend a significant grant to their board. They are clear on the risks involved and what needs to happen to make the grant successful. The answer is documented in the staff summary of the grant. Six to nine months later, like clockwork, they revisit the grant during program team meetings to assess progress on that risk and identify ways they can help ensure success. That is intentional learning. (See sidebar.)

6. **Start with your goal.** Make sure everyone involved in your strategy – both inside and outside the foundation – is clear on what you want to accomplish or the desired state you seek to achieve. Then figure out how to get from here to there. Not every individual organization involved will have the same mission or agenda, but they should be able to clearly see how their own goals align with the common vision and goals for your strategic work.
7. **Be aware of the risks.** Develop a risks list – literally write down all the potential risks, and then discuss their likelihood or how to reduce them. Be particularly mindful of what you want to accomplish, what roadblocks you're likely to encounter, how you might address them, and what you might still consider success even if your full vision isn't realized. This provides a clear plan of action for staff and trustees and reinforces the notion that you're all taking this risk together. It may help to create a "Red Team" – a group that can troubleshoot, think like a naysayer, test the assumptions, and identify holes in your plan.
8. **Anticipate the capacity you will need to be an effective strategic funder, and plan accordingly.** The transactional nature of responsive grantmaking (receiving proposals, reviewing proposals, making funding decisions, and mailing checks) requires different skill sets than strategic grantmaking, which might include idea generation, partnership development, relationship building, risk taking, etc.
9. **Retain an outside advisor.** Often, funders and other partners may be too close to an issue, or too immersed in community politics or traditions to see alternatives clearly or weigh them objectively. An unbiased, outside third party can help set

## ARE YOU READY TO BE STRATEGIC?

You might be ready to try strategic grantmaking if:

- You are frustrated by a lack of understanding of your foundation's impact.
- You have identified specific needs that you want to address more intentionally.
- Changes in the environment present new opportunities.
- You are noticing trends in grant requests, such as funding for a specific issue or in a particular community, signaling a potential need to dive deeper.
- A strategic opportunity presents itself, such as another funder leading a new effort and asks you to participate (and the strategy is in alignment with goals).
- You're bored. While consistency of focus is very important, if the grants you are making aren't exciting to you, it may be time to reexamine your approach.

If any of these apply to you, you might be ready for strategic grantmaking. If three or more apply, then what are you waiting for?

realistic expectations, ask difficult questions, "kick the tires" on proposed ideas, and help hold everyone accountable to their agreed-upon roles in the grantmaking strategy. The outside advisor could be a paid consultant, or a recognized and respected peer from outside the community who is willing to share time and wisdom.

10. **Trust your instincts.** You know your foundation and your tolerance for risk and return. Shifting to strategic grantmaking means you will be pushing boundaries and comfort levels, but if something or someone feels wrong (like a potential partner) they just might be. Pay attention.

## Five Mistakes to Avoid When Focusing Your Grantmaking

Like every complex undertaking, the road to strategic grantmaking comes with multiple pitfalls and opportunities to make mistakes – and that's okay. Mistakes can provide valuable information for ongoing learning, which is a key part of strategic





grantmaking. Acknowledging and acting on them only serves to make your efforts stronger.

That said, there are some common pitfalls that any foundation can avoid with a little forethought:

1. **Confusing strategy with goals or outcomes.**

As the Center for Effective Philanthropy blog explained in 2012, “Goals are what we are striving toward; strategies are the way we get to them<sup>3</sup>.” There is a tendency when discussing new ideas for philanthropy to rush headlong into strategies and tactics without carefully thinking through the *why* behind the strategy. Does investing in a reading program for third-graders sound like a good strategic move? Why? If your goal is to improve reading scores, perhaps it is a sound strategy. But if your goal is to close the achievement gap, then other strategies like funding pre-K or providing wraparound supports for families may be the better approach. Identify what you want to accomplish first, then the strategies for getting there.

2. **Putting all your eggs in one basket.**

As mentioned above, throwing caution to the wind and engaging full bore in a new strategy may be tempting for some, but when it comes to long-term effectiveness and impact, a slower, more intentional shift will bring greater clarity for your team and greater support from your community. Likewise, suddenly abandoning other responsive grantmaking activities may do more harm than good. Wade in and test the waters rather than diving in headfirst.

3. **Not communicating.** Expanding into strategic grantmaking often comes with a period of uncertainty. The tendency among many foundations is to “wait until we’ve figured it out before we communicate anything.” But the beginning of an exploration into strategic grantmaking is exactly the time to step up communication and transparency. It’s imperative to explain to your community what you’re doing, the process you’ll use, what you hope to learn and accomplish, how long you think it will take, and that you anticipate that

unforeseen factors may change and shape your plans as you move along. This also gives you the opportunity to invite others on the learning journey with you, and to provide their perspectives and knowledge to help inform your ultimate strategy. Of course, once you’ve designed your new strategy, share messages about that as well. Explain why you settled on the direction you have, how you came to that decision (your process), when and for how long you anticipate enacting this strategy, and who might be affected and why

4. **Being too prescriptive.** There is a difference between identifying an issue and identifying a solution. Sometimes funders identify a process or program that they believe will be extremely beneficial, and consider it a strategic approach to fund that effort broadly. Consider, for example, a national funder that offers a great sum of grant money to communities in exchange for applying a specific set of tools and activities exactly as the funder says. While the tools and activities may have value in some communities, different options may have been more effective in others. And, despite the funder’s good intentions, the time and resources needed to fulfill the funder’s demands took attention away from other activities that could have delivered greater impact. Dictating solutions is not truly strategic, unless a funder is willing to learn from grantee experiences and adapt its strategy accordingly. The better bet is to work with potential grantees to identify potential solutions to the issue you wish to address, and allow them help you design their respective approaches. Otherwise, you’re simply asking them to apply the “XYZ Foundation’s method” to a problem that they may or may not feel is best solved by that method. If there is a particular program that you feel would be helpful, poll potential grantees to see who may agree, who may not, and why.

5. **Believing you can’t make a difference.** If you don’t believe it, no one else will either. When it comes to strategic grantmaking, there’s no such thing as too small, too conservative, or too restricted in scope to make a difference. No

<sup>3</sup> <http://www.effectivephilanthropy.org/what-strategy-isand-isnt-hint-its-not-rocket-science/>



matter what your operating focus or geographic area, there are myriad ways to be strategic. If you can embrace them, others will too.

## The Board's Role

Boards have a key role to play in determining the direction and strategy of the foundations they govern. Therefore, boards have very important duties to fulfill when engaging in the shift to strategic grantmaking.

- **Be part of the process** to develop the foundation's funding approach. Your engagement is critical to your ultimate understanding, buy-in and long term support. In fact, a 2009 Center for Effective Grantmaking survey of boards found that boards are more likely to perceive that their foundation is effective when they are involved in the development of its strategies <sup>4</sup>.
- **Consider the cost.** Strategic grantmaking doesn't have to be expensive, but there are cost-related questions to consider. For example:
  - o How much of our unrestricted dollars will go toward strategic grantmaking?
  - o Are we prepared to commit for three, five or even more years on the same project?
  - o What kind of costs will we incur to train foundation staff?
  - o What type of research or content expertise might be needed to guide the development of the strategy?
  - o If we want to understand our impact, are we willing to invest in evaluation?
  - o Can we leverage other funders and partners to help address these costs?

There are also relational costs to consider. For example, if your new strategic focus means that you must cease support to grantees who have been receiving responsive grants for years, how will you manage the transition? Will you provide bridge funding or reduce support over a couple of years <sup>5</sup>?

- **Approve of the strategy.** It may sound overly simple, but boards should make an intentional effort to approve of the foundation's

grantmaking strategy – in the board meeting, among the staff, and out in public. The Winthrop Rockefeller Foundation, when asking its board to approve a 10-year strategy to develop and implement a vision for improved public education statewide, actually posted a 1-10 scale of agreement on its board room wall and took a photo of all board members standing under the "10" to indicate their strong and unanimous support of this strategy.

- **Be an ambassador/champion for the strategy.** Be ready and willing to speak about your strategic direction at community events, to groups that can become supporters, to partners, or even to the media. Use your connections and networks to find other potential partners and supporters and cultivate those either informally through one-on-one conversations or through formal convenings. Your public endorsement and promotion of the strategy shows that your foundation is truly committed and has the bench strength to see the strategy through.
- **Provide cover for the CEO and staff.** Not everyone may be happy with your decision, and some organizations may express their disapproval privately or publicly. Be ready to respectfully defend the decision, back up the actions of your staff in service of your new strategy. Even better, go the extra mile to ask those who feel unhappy with or alienated by your strategy to share their concerns so that they can inform your ongoing learning and work. Who knows? They may become your next, most supportive partner.
- **Think critically and ask hard questions.** Strategic grantmaking can be complicated, and adopting a strategic approach means there's a lot to consider. Board members can provide valuable input to the process by periodically taking a step back to consider the potential for trip-ups as well as the opportunities for enhancing success. Wearing the different hats of their professional and personal experiences, you and your board colleagues can help ensure that any new strategic grantmaking effort is thoroughly vetted and ready for action.

<sup>4</sup> Essentials of Foundation Strategy, Center for Effective Philanthropy, 2009 file:///Users/admin/Downloads/Grantcraft\_7168.pdf

<sup>5</sup> What You Need to Know: Comparing Grantmaking Strategies, Council on Foundations, 2008 http://www.cfstandards.org/sites/default/files/resources/COFStratGrntmkng.pdf

Putnam Consulting Group is an award-winning global philanthropy consultancy. Since 1999, we've helped foundations, corporations and philanthropists strategically allocate more than \$350 million in grants and gifts to increase impact, share success, and advance mission. We provide experienced advising and coaching, strategy development, and communications savvy to help foundation leaders and individual philanthropists engage in transformational giving.



## Putnam Consulting Group

Confident Giving • Dramatic Return

*"The Putnam team stands out because they always take the time to really understand what we need, and they maintain their objectivity to make sound recommendations. I highly recommend them."*

- Mark Smith, former CEO, California HealthCare Foundation

*"Kris is great at making the complex easy to understand, and helps grantmakers shift their thinking to embrace new possibilities and opportunities. Her presentations to our board were engaging, informative and inspiring, and have set us all on a clearer path toward effectiveness."*

- LaTida Smith, President, Moses Taylor Foundation

### WHO WE SERVE

Since our inception, we've worked with more than 60 foundations and philanthropists on more than 100 projects specifically designed to increase their impact and deliver dramatic results. A partial list of clients includes:

The Annie E. Casey Foundation  
David and Lucile Packard Foundation  
Charles and Helen Schwab Foundation  
Kate B. Reynolds Charitable Trust  
The Cleveland Foundation  
The California Endowment  
Winthrop Rockefeller Foundation  
California HealthCare Foundation

Emerging Practitioners in Philanthropy  
Fujitsu  
Avery Dennison Foundation  
Heising-Simons Foundation  
The James Irvine Foundation  
Robert Wood Johnson Foundation  
The Stuart Foundation  
Walton Family Foundation



### KRIS PUTNAM-WALKERLY

- A globally recognized philanthropic expert and advisor, named one of America's Top 25 Philanthropy Speakers in 2016 and 2017
- Author of *Confident Giving: Sage Advice for Funders*, named a Top 10 Corporate Social Responsibility Book in 2016 and a finalist for the 2017 International Book Awards
- Forbes contributor, and quoted in the Wall Street Journal, Washington Post, BusinessWeek and other media outlets
- Chair of the National Network of Consultants to Grantmakers
- Co-editor of the first edition of *The Foundation Review* dedicated to the field of philanthropic consulting
- Author of the highly acclaimed *Philanthropy 411* blog, *Smart Philanthropy*<sup>SM</sup> podcasts, and *Confident Giving*<sup>®</sup> newsletter
- More than 20,000 followers on social media
- Former trustee of the Community Foundation of Lorain County

### OUR SERVICES

#### PHILANTHROPIC ADVISING AND COACHING

- Offer immediate access to seasoned, confidential expertise and support
- Furnish guidance for new executives or trustees
- Deliver step-by-step coaching for new foundations
- Serve as go-to peer consultation for those working in isolation
- Provide board education
- Train internal program leaders

#### SPEAKING

- Deliver keynotes, speeches and workshops at national, regional or local meetings and conferences
- Tailor speaking engagements with customized research
- Immediately put new skills and ideas into action with tailored, post-speaking training sessions for staff or board

#### STRATEGIC CONSULTING

- Design grantmaking strategies and new funding initiatives
- Create theories of change
- Pinpoint funding gaps
- Identify funding partners and intermediary organizations
- Assess evaluation needs
- Determine evaluation readiness
- Translate evaluation results into clear recommendations

#### COMMUNICATING RESULTS

- Create strategic communication plans
- Craft compelling case studies
- Build toolkits to support your issue
- Share lessons learned
- Disseminate your story via our broad network of press and social media