



Advantage Consulting, LLC

Value Proposition & Impact Analysis Project

Presented to the GGA Steering Committee
September 7, 2017

Georgia Grantmakers
ALLIANCE



*in partnership with the
Southeastern Council of Foundations*

GGA Blueprint Task Force

Co-Chairs:

- Pat Lummus, Sartain Lanier Family Foundation
- Yvonne Whitaker, NCR Foundation

Members:

- John Bare, The Arthur M. Blank Family Foundation
- Shell Knox Berry, Community Foundation for the Central Savannah River Area
- Bobbi Cleveland, Tull Charitable Foundation
- Melanie Couchman, Couchman-Noble Foundation
- Mark Crosswell, R. Howard Dobbs, Jr. Foundation
- Kathryn Dennis, Community Foundation of Central Georgia
- Lesley Grady, Community Foundation for Greater Atlanta
- Gary Nelson, Healthcare Georgia Foundation
- John Stephenson, J. Bulow Campbell Foundation
- Tene Traylor, Kendeda Fund
- Sonia Vick, Williams Family Foundation of Georgia

Project Consultants

- Chris Allers, PhD, Advantage Consulting, LLC
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Phase I: Background Data Synthesis and Comparative Data Analysis

- Reviewed previous GGA minutes, member surveys and strategy session documents.
- Reviewed and embellished existing research related to roles, functions, staffing and business models of similar state-based grantmaker associations and networks in the Southeast and in peer U.S. states, and summarize their strengths and weaknesses.

Phase II: Member and Key Stakeholder Data Collection

Conducted survey of Georgia grantmakers
(N= 91).

Conducted 29 stakeholder interviews.

Phase III- Analysis and Strategic Business Planning

Facilitated the group's analysis of the information for the purpose of developing and recommending a blueprint for moving forward- including vision, mission, strategy, structure, financing options and board governance.

Interview Research Report Key Terms

- Most = 51+% or 15+
- Many = 33.3+% or 10+
- Several = 15% or 5+
- Few = 10% or 3+

Key Findings from Research

Most interviewees reported significant knowledge of and involvement in GGA while 6 interviewees (21%) reported little or no involvement.

82% of survey respondents reported having been involved with GGA. The majority of these respondents had been involved with GGA for more than a year. A significant percentage (38.5%) had been involved for 4 or more years.

Needs/Challenges

Most interviewees reported...

- lack of capacity (limited or no staff)
- multiple demands on, and requests for their time
- needing to participate primarily in those activities that have a direct benefit to their Foundation's mission

Many reported difficulties assessing the real impact of their grantmaking

Needs/Challenges

Survey respondents reported the following as moderate or significant barriers to their participation in GGA activities

The location of events	35.5%
The lack of my Foundation's capacity	26.7%
The lack of new and relevant information	22.5%
Feeling uncomfortable interacting with others	11.1%

Needs/Challenges

Among Survey Respondents...

46.2% reported that their “need to build connections with other Georgia grantmakers” is “**somewhat**” or “**not**” satisfied

54.9% reported that their “need to explore Georgia issues and understand their connections to public policy as well as their implications for grantmaking is “**somewhat**” or “**not**” satisfied

GGA Contributions

Most interviewees reported the unique contributions by GGA as

- bringing together Georgia grantmakers
- addressing Georgia policies and their impact
- educating grantmakers about Georgia issues

Survey Respondents reported the following a significant contributions

1. Networking – 36%
2. Policy issues education – 24%

GGA Weaknesses

Several interviewees reported:

- a lack of clarity of what GGA is and its relationship with SECF
- that GGA was Atlanta-centric (location and content themes)
- the lack of effective marketing and communication activities
- a perceived lack of relevance/applicability of some program content (especially to smaller and non-Metro foundations)

Potential Duplication With Other Organizations

Several interviewees reported

- a proliferation of meetings and events
- bringing together Metro Atlanta Foundations

There were 27 survey responses to this question and the following themes emerged:

- No duplication (44%)
- Confusion about event host (19%): which association is hosting/facilitating events, particularly between SECF and GGA
- State policy analysis (19%): support other organizations doing Georgia policy analysis

Importance of Networking and Education Roles

Survey respondents were most likely to report the following activities as “very important:”

- Opportunities to learn from other Georgia funders about their grantmaking strategies (62.5%)
- Issue-specific annual meetings (59.6%)
- Periodic lunch & learns (59.6%)

Importance of Policy Education Role

- **Most** interviewees reported that they were personally interested in public policy but their foundation was not/did not address policy issues in their strategies or activities
- **Many** felt that GGA's policy work was good to have but not directly impacting their activities
- **Several interviewees** reported that they see policy and grantmaking as deeply interconnected and are actively looking at the impact of policy on their grantmaking strategies

GGA Role in Policy Education

Survey respondents were most likely to report the following activities as “very important:”

- Non-partisan analysis of state policies (current &/or proposed) that impact on issues facing Georgia (56.6%)
- Non-partisan analysis of the impact of state policies (current &/or proposed) on the nonprofit organizations that you fund (55.6%)
- Issue-specific meetings that include public officials and nonprofit leaders as well as private grantmakers (53.3%)
- Non-partisan analysis of potential philanthropic strategies to impact on issues facing Georgia (50%)

Feedback About GGA Organization Model

Most of those involved with GGA felt that the structure should stay the same (affinity group under SECF & volunteer driven/led) OR remain under SECF but hire a contract professional staff person. Of those who were most knowledgeable about SECF, **most** reported they preferred the second option.

A **few** reported they would support GGA if it became a state association but they were apprehensive about the ability of GGA to sustain a new organization

Feedback Regarding Financial Support

Most reported they were comfortable with paying an event fee

Several reported they would support voluntary annual membership dues (assuming they are affordable and proportionate to the value GGA provides)

A **few** reported they might financially support the organization through a grant- especially if GGA remained under SECF

A **few** reported they would sponsor GGA meetings and events- based on the topic of the session

Funding Models

Survey respondents reported the following funding models as either having significant or some support

- Events Fees 73.9% (65)
- Membership Fees 53.9% (48)
- Program-related grants 31.4% (28)
- Operating grants 20.2% (18)

Vision & Mission

Vision Statement

- Improving the lives of Georgians through informed and strategic philanthropy.

Mission Statement

- Connecting and educating grantmakers to leverage philanthropy's impact in Georgia.

Strategic Goals

Goal 1: To provide Georgia grantmakers with strong and productive philanthropic networks.

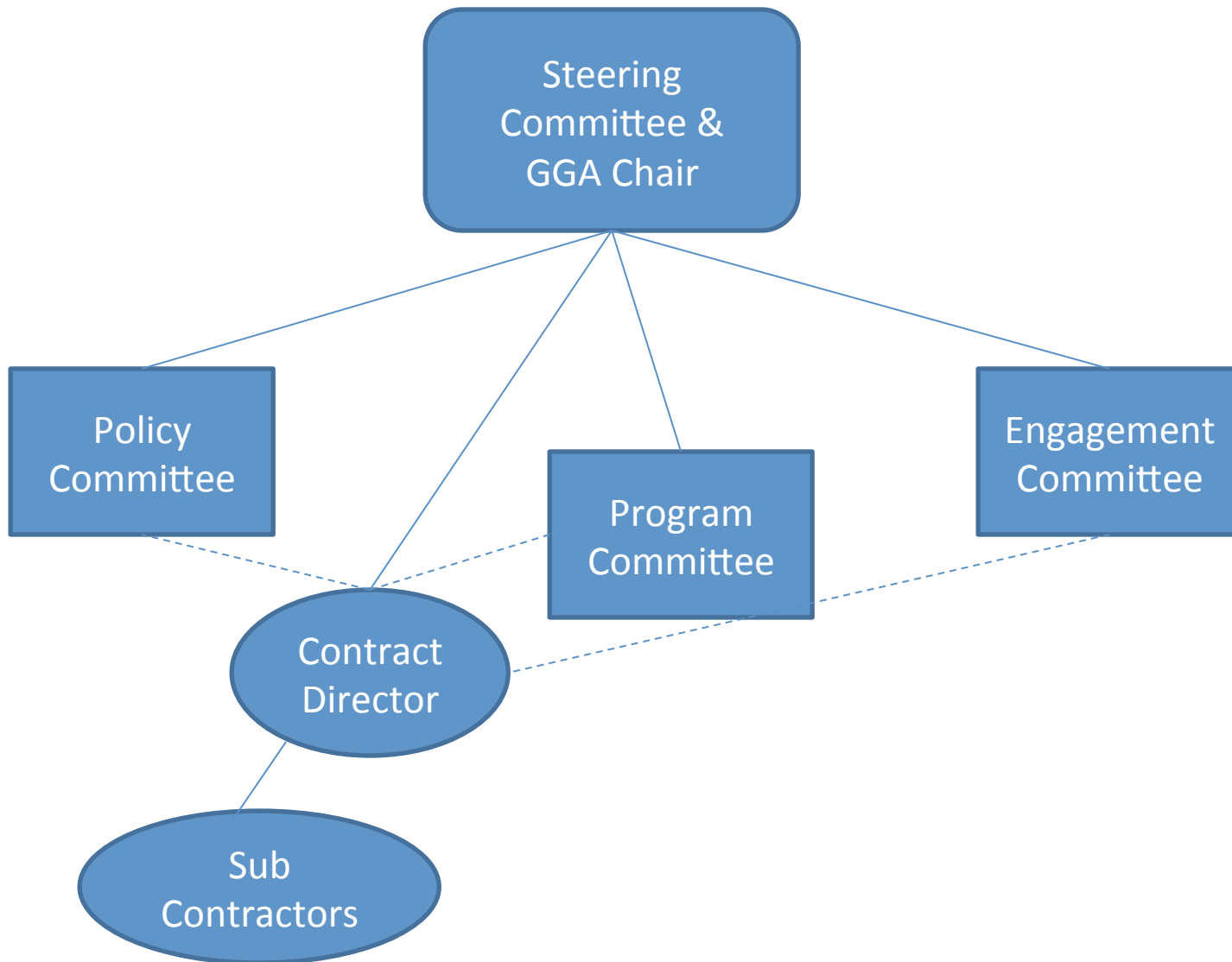
Goal 2: To educate Georgia grantmakers about critical issues facing Georgia, and opportunities and strategies for private grantmakers to have impact on these issues, including opportunities to partner with public sector stakeholders.

Goal 3: To provide Georgia grantmakers with knowledge and understanding of state public policies as they relate to addressing Georgia's critical issues, and the impact of public policy on the potential effectiveness of private sector grantmaking.

Strategic Objectives

- 1)** Increase the active involvement of Georgia grantmakers in GGA throughout the state.
- 2)** Increase and improve the visibility and brand recognition of GGA within the state's philanthropic sector.
- 3)** Increase the quality and scope of Georgia grantmakers' networks.
- 4)** Increase Georgia grantmakers' understanding of the impact of Georgia public policies on grantmaking and philanthropic goals.
- 5)** Increase the impact that GGA has on influencing policy in a non-partisan way.
- 6)** Increase the knowledge of Georgia grantmakers in areas such as the general grantmaking landscape, grantmaker priorities and methods.
- 7)** Increase GGA's capacity to meet the organization's strategic objectives.
- 8)** Increase the financial resources needed for GGA to meet the organization's strategic objectives.

Roles & Responsibilities



Engagement Committee

1.1 Partner with local community foundations to identify and help engage participants in GGA activities- including, but not limited to, partnering with GGA to serve as convener/facilitator among local grantmakers and policy makers.

1.2 Develop and conduct a participant “peer recruitment” campaign.

3.1 Develop and institute a sustainable “peer to peer” model that makes accessing information and support more effective, efficient and productive for GGA participants (peer led but staff supported).

3.2 Expand the networking component of the annual meeting to include an event on the prior evening.

Contract Director

- Support Committees & Programs
- Expand contact database
- Manage strategic communications
- Manage GGA website content
- Oversee sub-contracts in conjunction with Committees

800 -1000 hours per year (40% - 50% FTE)