

## Georgia Grantmakers Alliance

### Interview Report

July, 2017

Participants (N=29) completed a 30 minute, structured telephone interview. The interview questions are included in the Appendix (pages 10 -12).

#### Type

- Family Foundations 19
- Community Foundation 4
- Corporate Foundation 2
- Independent Foundation 3
- Supporting Foundation 1

#### Role

- Staff 21
- Trustees 8

#### Staffing

- Foundation with Professional Staff 24
- No Professional Staff 5

#### SECF Affiliation

- SECF Member 23
- Not an SECF Member 6

#### Location

- Metro Atlanta 16
- Non-Metro 13
  - Central 4
  - Northeast 3
  - Coast 2
  - Northwest 2
  - Southwest 2

## GGA Interview Report

### Key Terms

Due to the small sample size and the desire to frame the results as directional as opposed to specific, the following terms are used to represent significant groupings of responses.

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

### Level of Involvement

- **Most** reported significant knowledge of and involvement in GGA
- **Most** have attended one or more Annual Meetings in the past three years
- **Many** had attended at least one Lunch and Learn in the past three years
- **Several** reported they knew very little about GGA
- **Several** reported receiving and actively reading/using the policy briefing emails; several reported not receiving the emails
- **Several** reported having participated in the Georgia Grantmaking survey and or read the report
- **Several** were former GGA leadership volunteers
- A **few** reported that they had only been to one or two events
- A **few** reported that they couldn't remember which events were GGA and which were other SECF events

### Overall Grantmaking Activities

- **Most** report an "open" grantmaking process
- **Most** focus on specific issues (education, child welfare, health and human services)
- **Most** focus on specific geographic areas within the state
- **Most** report they do not actively engage in formal "co-investment" activities but are informed by the grantmaking of others

Challenges They Face as Grantmakers

**Most** 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
- **Several** reported the size of their allocable fund pool as their most significant challenge
- A **few** reported that they covered large sections of Georgia and found it difficult to get impact due to the diversity and complexity of the area

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Most Important GGA Contributions

- **Most** reported the top contribution was meeting grantmakers from across the state (typically through the annual meeting)
- **Several** reported that they, other staff or trustees had learned important and useful information at a lunch and learn event
- **Several** reported that they had found the policy analysis and briefings to be informative
- A **few** believed that the GGA policy analysis and education resources permitted them from having to obtain or invest in this work on their own

Greatest GGA Weaknesses

- **Several** reported a lack of clarity of what GGA is and its relationship with SECF
- **Several** reported that GGA was Atlanta-centric (location and content themes)
- **Several** talked about the lack of effective marketing and communication activities
- **Several** reported a perceived lack of relevance/applicability of some program content (especially to smaller and non-Metro foundations)
- A **few** reported GGA's policy work being limited to policy education and not influence

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#### Level of Understanding of/Interest in Public Policy

- **Most** reported that they were personally interested in public policy but their foundation was not/did not address policy issues in their strategies or activities
- **Several** reported that they see policy and grantmaking as deeply interconnected and are actively looking at the impact of policy on their grantmaking strategies
- A **few** reported they are trying to move their trustees to a more active policy focus

#### Importance of GGA Providing Policy Analysis and Education

- **Many** felt that GGA's policy work was good to have but not directly impacting their activities
- **Several** felt that GGA's policy work was complementary of other policy initiatives
- A **few** felt that policy education was the most important contribution of GGA

#### Perceptions of the Annual Meeting

- **Most** reported that the annual meetings are very well executed
- **Most** reported that networking opportunities and meeting other Georgia Grantmakers was the greatest draw
- **Most** reported that true, statewide participation was very important
- **Several** reported that parking and travel time was a significant consideration

#### Perceptions of Lunch & Learns

- **Most** reported that the relevance of the issues and content areas was essential to their participation
- **Most** reported that the events were well conceived and executed
- **Many** felt that they would be willing to travel if the content was relevant
- **Many** of those interviewed from outside Metro Atlanta reported that they would like at least one lunch & learn event in their region

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### Perceptions of Policy Briefings

- **Many** reported that they found the policy briefings very well written and easy to read
- **Several** reported that they only skimmed the briefings
- A **few** felt that the policy briefings were additive but that they received other briefings from other sources that they felt were similar in content
- A **few** reported that the policy briefings were valuable as a counterpoint to briefings they received from grantees

### Perceptions of the Georgia Grantmaking Survey & Report

- **Most** reported they (or their foundation) actively participated in the survey
- **Several** reported that they found the information valuable and used it in their internal discussions or planning
- A **few** could not remember if they had participated in the survey and could not remember having received the report

### Other Philanthropic Support Organizations Engaged

- **Most** reported active involvement with SECF
  - Atlanta Corporate Donors
  - Atlanta Foundations Forum
- **Several** mentioned:
  - Council on Foundations
  - National Center for Family Philanthropy
- A **few** mentioned:
  - Philanthropy Roundtable
  - The Foundation Center
  - National and regional subject matter groups (e.g. environmental philanthropy)

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#### Extent to Which these Organizations Address/Meet Needs

- **Most** reported their education needs were met-especially related to operating and sustaining the Foundation
- **Most** Atlanta- based Foundations felt that their need to connect/engage with other Atlanta philanthropies was met
- **Most** felt that their need to understand and influence national policy issues was met (however, **most** did not feel this was a priority for their Foundation)

#### Areas of Need Not Met

- A **few** said that they would like to see more peer interaction and conversations among the state's community foundations, as well as the Georgia family foundations
- A **few** said that there were few resources specifically aimed at on-boarding new CEOs and executive staff

#### Specific Feedback about SECF

- **Most** reported that they were generally happy with their involvement with and support from SECF
- **Several** reported concerns about poor communications coordination and/or poor program content with limited relevance or applicability to their situation
- **Several** reported they liked the range of topics and resources through SECF events
- **Several** felt that SECF was good at addressing the "social status" of participants (e.g. providing higher quality venues, catering, etc.)
- A **few** reported that they did not find SECF met their needs

Comparison of GGA to Other Organizations

- **Most** reported unique contributions by GGA as
  - bringing together Georgia grantmakers
  - addressing Georgia policies and their impact
  - educating grantmakers about Georgia issues
- **Several** reported they felt GGA may be duplicating the efforts of others as
  - Proliferation of meetings
  - Bringing together Metro Atlanta Foundations

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Feedback Regarding Models for Supporting GGA

- **Most** (nearly all) 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 typically were apprehensive about the ability of GGA to sustain a new organization

Feedback Regarding Financial Support of GGA

- **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

## GGA Interview Report

### Feedback regarding a GGA Contract Position

**Note:** The following are random comments and have been presented even if only one interviewee provided this feedback.

### Potential Challenges

- GGA volunteer leaders may not cede responsibility/authority to the contract position
- Finding the right person could be difficult. This would probably be a 20-30 hour per month contract professional. The position would need to be filled by someone who can
  - Help assess and translate the broad and diverse needs and interests of grantmakers
  - work with the volunteer leadership
  - understands strategic programming from a Foundation’s perspective
  - knowledgeable about the State of Georgia (not just Metro Atlanta)

### Potential Benefits

- Improve communication content and strategic use of communications for GGA
- Support GGA Steering Committee- especially related to conferences/events
- Provide strategic thought leadership about topics and formats
- Increase membership recruitment/outreach (especially to new leaders or new foundations)
- Facilitate relationships between GGA leadership and SECF
- Provide more contact and coordination with SECF contract staff
- Ensure continuity of “institutional knowledge”
- Reduce the potential of burnout among the GGA core volunteers

Appendix A- Interview Guide and Questions

Thank you for agreeing to this interview today.

I am a partner at Advantage Consulting and our firm was hired to help the Georgia Grantmakers Alliance assess its value proposition and examine its options for growth and increased impact.

Georgia Grantmakers Alliance was started in 2010 as an affinity group under the Southeastern Council of Foundations. While it has contracted with SECF for about 145 hours of staff support each year, the Alliance is largely run by volunteers. Its four core functions are to:

- **Convene.** Bring private grantmakers in Georgia together to strengthen connections.
- **Learn.** Explore together statewide issues, connections to public policy, and the implications for grantmaking.
- **Educate.** Share our learning within and beyond the grantmaking community to promote sound public policy.
- **Connect.** Expand our reach by connecting with partners that share common interests.

In the past few years, the Georgia Grantmakers Alliance has increased the number of its programs and activities. It is *assessing the scope and nature of the programs and services that GGA offers* well as the future model for sustaining and expanding support to Georgia grantmakers based on the interests and needs of participants. GGA has been benchmarking against the work of these other associations...and is working to determine what type of state level association has the greatest potential value for Georgia.

The Georgia Grantmakers Alliance is conducting both an on-line survey of grantmakers across Georgia and phone interviews of approximately 30 grantmakers to help provide important information in this process. The survey and the interviews cover different content so please consider completing the on-line survey as well.

For today's interview, I will be asking you about 20 questions. I would like your permission to tape record your responses purely for the purposes of having a complete set of notes. None of the feedback you share with me today will be shared directly with the GGA leadership. We will be summarizing the feedback across all interviews and providing the Planning Task Force with a report that will highlight key themes and concepts. Your specific responses will remain confidential.

In the event you have questions about the process or GGA in general that I am unable to answer, I will be happy to capture your questions and follow-up with answers.

Do you have any questions so far?

Do I have your permission to tape record this interview?

- 1) Please briefly describe your Foundation's mission and grantmaking activities.
- 2) What challenges does your Foundation face in achieving its mission and desired results?
- 3) Overall, how would you describe your involvement with the Georgia Grantmakers Alliance?
- 4) What are your general perceptions of the Georgia Grantmakers Alliance?
- 5) What do you perceive have been GGA's most important contributions to you or other grantmakers?
- 6) What do you perceive have been GGA's greatest challenges or weaknesses?
- 7) A particular area of focus for GGA has been in the provision of nonpartisan analysis of public policies and educating grantmakers on the potential impact of these policies on the work of the nonprofits that foundations fund ....as well as on the problems and challenges that foundations seek to impact. How would you describe you and your Foundation's general understanding of and/or interest in the intersection between grantmaking and public policy at the state level?
- 8) How important is it to you and your Foundation that GGA is providing this type of policy analysis and education to Georgia grantmakers?
- 9) I am going to read to you a list of the programs and activities GGA sponsors. Please indicate which of these activities you have been involved in anytime during the past three years.
  - a. Annual Meeting
  - b. Lunch and Learns
  - c. Policy Briefing emails
  - d. Site Visits
  - e. The Georgia Grantmaking Survey and Report
- 10) For the areas in which you have indicated involvement, please describe your impression of how effective or useful these activities are for you. (go through each area, one at a time)
- 11) What other philanthropic support organizations does your foundation participate in at the local, state, regional or national level.
- 12) To what extent does your involvement with these other organizations fully address your needs and wants as a grantmaker? Is there anything not currently provided by them that you want or need as a grantmaker?
- 13) What is your impression of GGA in comparison to these other organizations? (assess for duplication and unique contributions)

- 14) What are the factors that might influence your involvement with GGA in the future?  
(probe for barriers, obstacles)
- 15) If GGA could do one thing to support you as a Georgia grantmaker, what would be most helpful to you?
- 16) In the event that the feedback from GGA participants and stakeholders is that there is a need to sustain and grow the programs and activities sponsored by the Georgia Grantmakers Alliance, the leadership of GGA will be considering a range of possible future models for structuring and supporting the organization. Currently, there are 32 state-level grantmaker associations across the country. One option might be for GGA to become a separate, stand-alone organization which would maintain some ongoing involvement in the Southeastern Council of Foundations- such has occurred in North Carolina and Florida. Another option may be for GGA to expand its contracting of staff support through SECF or supplement that staffing... but remain an unincorporated "affinity group." What are your thoughts about either or both of these options for GGA?
- 17) If GGA determined that Georgia grantmakers needed the services and support that could best be provided through either a stand-alone organization or expanded staff support, under what circumstances might your Foundation be willing to do the following:
  - a. Financially support the organization through a grant
  - b. Pay annual membership dues
  - c. Sponsor GGA meetings and events
- 18) Do you have any words of wisdom or any advice for the GGA leadership as they continue to examine these issues and consider future opportunities?
- 19) Do you have any other comments you would like to share?
- 20) Do you have any final questions?

Thank you for your time today. Your input is incredibly important to this process and I know that the Georgia Grantmakers Alliance leadership is grateful for your involvement.