



Putnam Consulting Group

Confident Giving • Dramatic Return

Transformational GivingSM Webinar Series Discussion Guide

Episode 4: Strategic, Responsive or Both Live Webinar

1. Review the attached “Responsive vs Strategic/Proactive Continuum.”
 - Where do you think your foundation currently is on this continuum?
 - Where would you like to be 3-5 years from now?
 - Ask these questions as a group activity with your team. How do your responses compare? If there is a lot of variety, why?
 - What specific steps can you take to achieve where you would like to be on this continuum?
2. As a responsive grantmaker:
 - What do you feel are the values and benefits of responsive funding?
 - What are some important new ideas you’ve identified or accomplishments you’ve made as a result of being open to receiving proposals from a wide variety of nonprofits?
 - If you were to move to more strategic grantmaking, is there value in responsive grantmaking that might get lost? Is that OK or is there something you can do to address that?
3. As a strategic grantmaker:
 - What do you feel are the values and benefits of strategic funding?
 - What are some important accomplishments or results you’ve achieved as a result of being strategic?
 - In what way can or should responsive grantmaking be incorporated into your strategic approaches?
4. Regardless of whether your approach, ask yourselves these “learning questions,” such as:
 - What are the top three things we have learned about our approach thus far?
 - If we could do it all over again, what would we do differently?
 - What has surprised us? What are we seeing that is different than what we originally expected?
 - What progress are we making on our approach overall?
 - What has been the most challenging?
 - What opportunities do we see with our approach going forward?
5. What is one idea you learned from today’s webinar that you want to implement? Develop an action plan of steps you can take in the next few months, including deadlines and accountabilities (who will do what, by when?).

Need help with any of the topics referenced above? I serve as a trusted advisor and personal sounding board to philanthropy leaders and ultra high net worth donors. As your advisor I provide you with unlimited access to my expertise and advice on any aspect of your work, strategic or tactical, helping you navigate your day-to-day and long-term strategic decisions. Learn more about how we can work together here: <https://putnam-consulting.com/services/advising-and-coaching/>. Or simply call me at 800-598-2102 x1 so we can discuss your needs and see how I can be of help.