



Eight Questions to Improve Your Philanthropic Giving This Year

Every new year, I speak with many philanthropic leaders about their goals and hopes for the coming year. By the end of January, those goals and hopes have become a blur for many. Some entered the New Year running and are starting to feel overwhelmed. A few are experiencing a sluggish start. Others aren't sure where to begin. That's completely understandable—philanthropy is hard work! However, taking a little time for planning can help you achieve dramatic results this year. The next time January rolls around, ask yourself these eight questions:

1. What can I learn in the next three months? These should be things that will improve your grantmaking for the remainder of the year. You might need to conduct an evaluation, retain an expert advisor, or spend the day reading articles and listening to podcasts about a certain topic. Armed with new insight, you will be better prepared to allocate your talent, time, and resources and achieve more dramatic results.

2. What holds me back? Identify and eliminate it. If you are overwhelmed by email, commit to reaching “Inbox Zero” by the end of January. Do you have a poverty mentality, believing you don't deserve or can't afford something that would greatly improve your work experience? Are you hesitant to seek a promotion because you fear you don't have the leadership skills? Hire an executive coach, talk to a therapist, take a class—do whatever it takes to move past this self-created hurdle so that you can be happier and accomplish more.

3. How can I empower my staff? From the vice president of programs to the administrative assistant, your staff could have greater impact if they felt they had the authority and the training to do so. This could involve increasing program staff's budget and grantmaking authority, eliminating bureaucratic hurdles within your operation, training assistants in customer service and allowing them to resolve problems, or rethinking your entire HR function to strategically develop leadership at all levels of your foundation. The changes can be big or small, and the best source of ideas is your staff.

4. What can I share? You've benefited from the wisdom and knowledge of experts, nonprofit leaders, and community members who helped you shape your grantmaking strategy. Now it's time to pay it forward by sharing what you've learned with colleagues who can benefit from your insight. Write a case study or create a funder toolkit to share what your foundation has accomplished, what you've learned, and what you would do differently.

5. If I could only accomplish one thing this year, what would it be? That really gets to the heart of it, doesn't it? You might be at your organization for the next ten years, but what if this were your last year? What do you really want to accomplish? For what do you wish to be remembered? Write it down, schedule time in your calendar, retain the help you need, and go do it.

6. What are my top three priorities for the year? (If you find it hard to pick only three, refer to the previous item!). I'm not saying you can't work on the other four, seven, or ten things. But now that you know your top priorities, you can determine what steps you can take in Q1 to make sure they happen by Q4. For example, if you want to launch a new grantmaking initiative, you might need to retain a consultant to conduct an environmental scan. If you want to change, expand, or eliminate a funding strategy, you might want to evaluate it first to assess impact and opportunity. At the very least, create a time line starting with what you want to accomplish by year's end and work backward.



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7. What is the one thing I can do now that will make everything else easier or unnecessary? In my experience, this often involves delegation: taking the time to hire or train someone today who can begin taking work off your plate. But it could also mean firing someone, reorganizing your team, recruiting new board members, investing in coaching or leadership development, etc.

8. What activity consistently takes an obnoxious amount of time and drains energy from me and my team? You know what I'm talking about. It's that activity that just popped into your head. That thing that you dread doing every year, quarter, or month. Identify three ways you can reduce its intensity or eliminate it entirely. Is your board book two hundred pages long? Develop a plan to reduce it to fifty. Are your proposals cumbersome to read? Streamline them. Yes, this will take time, but if you start that project now, by the end of the year your staff will consider you their hero. More important, you will free up time and mental energy to accomplish your top priorities.

I guarantee that if you answer and act upon these eight questions—preferably within the first quarter—you will reap the rewards during the remainder of the year.

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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.



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"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

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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:

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Charles and Helen Schwab Foundation
Kate B. Reynolds Charitable Trust
The Cleveland Foundation
The California Endowment
Winthrop Rockefeller Foundation
California HealthCare Foundation

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The James Irvine Foundation
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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*SM podcasts, and *Confident Giving*[®] newsletter
- More than 20,000 followers on social media
- Former trustee of the Community Foundation of Lorain County

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- 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

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- Deliver keynotes, speeches and workshops at national, regional or local meetings and conferences
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- 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

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- 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



To learn more, contact Putnam at 800.598.2102 or visit us at putnam-consulting.com