



From Ingenuity to Implementation

10 ways to shape your foundation's newest grantmaking initiative

One reason we are involved in grantmaking is to be a part of making local, state, national, and global change from the ground up. Grantmakers often see real need for change in programs and services, or they see places where new programs and services will make all the difference. The key to creating real change is understanding and preparing for the complexities of a grantmaking initiative before diving in. Careful planning, focused relationship building, and a little thirst for adventure can help you take your next grantmaking initiative to new heights while respecting the boundaries of budgets, staff, and other limited resources. Here are some tips on getting started with your next initiative.

- 1. Anticipate ongoing complexity.** Grantmaking initiatives often spring from an idea brought to the table with a lot of enthusiasm. “We can curb obesity in our community if we restructure our neighborhoods to be easily walkable.” Sounds simple enough. But grantmaking initiatives are rarely simple. They require many moving parts that can shift direction quickly. Suddenly you realize you need more funders, more partners, more energy, and more ideas. Be prepared for the inevitable roadblocks so you can generate the necessary support.
- 2. Lock in leadership support.** Make sure that you have the full and unwavering support of the sponsoring foundation's leadership and board before embarking on any initiative. Do some research on past grantmaking efforts. Confirm that there will be follow-through from beginning to end, and that leadership will remain supportive and engaged throughout the initiative. The support will prove invaluable—if not imperative—throughout the initiative's lifespan.
- 3. Engage your management capacity.** A strong, resourceful manager who is willing to lead the charge is vital to the success of any initiative. You need someone who is both enthusiastic and engaged in the effort you are embarking on, and who has the skill sets and knowledge to oversee the process. Once the initiative is underway, be sure to continue to provide the administrative and task-focused support needed, so he or she can stay focused on the big picture.
- 4. Engage foundation staff.** A new initiative may be the spark your foundation needs to ignite fresh energy among staff members. Although you want one person to be the point man (or woman), tap into your existing staff to see where their skills may best be used to support the new project. They may be excited to manage some relationships, sustain and generate communications, design evaluations, and raise funds. Foundation staff can also pitch in to review proposals and conduct site visits.
- 5. Allow ample time.** A strong and strategic grantmaking initiative is not developed overnight. Make sure you allow time for planning, relationship-building, and stakeholder engagement. Take time to design a strong initiative before launching it. Then develop a theory of change to ensure that you can continue to articulate your goals and strategies throughout the initiative to guide ongoing management and evaluation.
- 6. Build strong relationships.** Determine who needs to be involved and, equally important, who wants to be involved. A partner with a passion for your work is as valuable or even more valuable than a partner with a pocketbook but no



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passion. In any successful initiative, a lot of relationship building goes on behind the scenes. Use in-person meetings and phone conferences to engage partners, build momentum, address concerns, and put out fires. Let administrative staff manage the scheduling so that you and your key players can manage the relationships.

7. Cultivate ongoing communications. Internal and external communications are vital to the success of any initiative.

Use your communications staff or key partners if they're available. Otherwise, retain outside experts to identify audiences, hone key messages, and craft a communications plan. Stakeholders and key audiences must be able to clearly and consistently communicate the goals of the initiative at every stage of its development. Make sure your communications complement your initiative. If you are funding arts in schools, be creative; if you are funding an environmental program, be green.

8. Meet pressure with action. Foundation staff are often pressured to make initiative grants quickly, far before planning is complete. Understandably, the foundation board wants to ensure that every dollar has a positive impact, while still demonstrating that the initiative's funds are being invested in the appropriate communities or agencies. Anticipate this pressure by planning in advance for initiative success. Small pilot grants can be made during the planning stage to test the waters before launching the fully developed initiative.

9. Embrace risk! Any initiative or change effort involves risk. Be brave! Name the risks and embrace them. Have the initiative planning team brainstorm a "risk list." What might this list include? Perhaps funding did not have the impact anticipated, or you incurred negative PR where you anticipated a positive reaction. Discuss strategies to mitigate each risk. Bring the risk list to each planning meeting for review and updating. Some risks will disappear, and new ones will become evident. Remember: In community grantmaking, taking risks is often a vital part of creating solutions.

10. Remember that the foundation is on the line. Launching an initiative takes a major commitment from a foundation. Keep in mind that the initiative's success or failure will reflect directly back onto the foundation itself. Embrace risk, yes, but also leverage all available resources to ensure success. The CEO or board chair might serve as an initiative champion. Top leadership could make key introductions to business, political, and community leaders. With strong support from the inside out, a well-planned initiative can generate years of positive impact.

Developing a new initiative from vision to implementation can be a challenge, but the rewards of a successful endeavor far outweigh the difficulties. Maybe you have an initiative in mind that you would like to bring to your board. Start your planning today, so you are fully armed with answers when questions start coming to you. Who are your potential partners? What are your goals, and what barriers might get in the way of achieving them? How does the initiative reflect the mission of your foundation? Answer these questions now and you will be on your way to making an investment that makes all the difference, in the near term and in the future.

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