

# ENGAGING YOUR BOARD & STAFF IN MAKING CHANGE

*This is the second in a series of three articles which will explore how small and medium-sized family foundations can increase the impact of their grantmaking and engagement in communities.*

*The series will culminate in a corresponding fall conference session for family foundations led by the authors.*

Family foundations play many roles in affecting change in a community: grantmaker, partner, player. The common thread, whether you fund, build relationships or serve as a catalyst, is how you can impact others as they approach the problems that you and they are working to resolve. It makes you a change agent, magnifying the impact of your efforts.

There are many opportunities to explore more intently what you want to accomplish and how to have a greater impact in realizing that change. Here are a series of steps your foundation might consider in that exploration:

## **STEP ONE: DEVELOP A SHARED AND CLEAR UNDERSTANDING AMONG BOARD AND STAFF ABOUT THE CHANGE YOUR FOUNDATION ENVISIONS.**

A conversation about donor intent is a great place to start. You might organize discussions that look at how well the foundation has lived out its mission, values and original intent of the benefactor, regardless of whether that goal was highly prescribed or very broad and adaptable over time.

If you are fortunate enough that the donor is still engaged with the foundation, these conversations could become a valuable oral history to provide further background and understanding to future generations of family and board members. In other cases, where the donor is deceased, seek out family, friends, associates and board members who knew the donor and can share their recollections to round out what is already known about the donor's thinking, feelings and perspectives.

## **STEP TWO: SHAPE A DIALOGUE TO GAIN FURTHER CLARITY ABOUT WHAT THE FOUNDATION HOPES TO ACHIEVE – AND HOW WELL IT IS DOING IN MEETING, EXCEEDING OR MISSING THOSE TARGETS.**

An entry point for your foundation in this discussion is to ask itself this bottom-line

question: *How are we making a difference?*

Everyone involved in the foundation's work may feel good about the grants that are awarded, the meetings convened, and the leaders in the community that are supported. But, in asking "How are we making a difference", you can begin to surface more specific thinking and beliefs about what that means for board members and staff. Some questions to guide this conversation include:

- How well are we manifesting our original intent, and what does that mean for our work?
- How are we making an impact on the issues and communities we work in?
- How do we see progress being made about the issues we care about?
- How are our actions supporting that progress?
- What are ways we can approach our grantmaking differently to achieve a greater impact on the core problems?
- What are our strengths, and what areas need more attention?

## **STEP THREE: SEEK OUT WAYS YOUR FOUNDATION MIGHT BETTER LEVERAGE FUNDING DOLLARS, AS WELL AS EXTERNAL RELATIONSHIPS, TO CREATE THE CHANGE YOU ENVISION.**

As your foundation's board and staff members interact with the community, each should be attentive to existing and new relationships and to opportunities that may present themselves which further advance the foundation's effort. It may be forming a strategic partnership with another foundation, participating in a funder's collaborative on a shared topic of interest, or coordinating research with another funder or agency.

Ask yourselves how you might keep track of those relational intersections which enhance your collective sphere of influence and link your foundation to a growing variety of potential partners. You could include this discussion at board and staff meetings, or allow time for special briefings to consider how best to leverage these connections.

## **STEP FOUR: WHEN YOU REACH A PLATEAU, SEEK INSPIRATION.**

If you could use a boost, consider inviting an occasional guest speaker to your board meetings - a nonprofit director, civic leader or researcher who could inform your understanding of a particular topic and spark a conversation with insights on how your foundation can better tackle the issues you fund [note: **Quarterly Family Philanthropy Forum meetings sponsored by IGA could fill this role for foundations and family members based in central Indiana.** For more information, contact Jack Cole, Director, Member & External Relations, at [jcole@indianagrantmakers.org](mailto:jcole@indianagrantmakers.org) or (317) 630-5200].

You might also visit with your philanthropic peers to learn about how they have ramped up and focused their efforts in achieving change. This can be done informally, or through referrals and organized events with the help of Indiana Grantmakers Alliance. For IGA assistance, contact Jack Cole.

## **STEP FIVE: REPEAT AS NECESSARY.**

As you proceed in these deliberations, know that this is an ongoing process. These steps are part of a continuing practice through which board and staff become more effective change agents. It is a process that needs to be revisited at regular intervals—at your staff meetings or at each board meeting—to ensure you are moving toward your goals, incorporating what you have learned, and taking full advantage of the new relationships you are developing.

Use these tools and methods in ways appropriate to your foundation's style and culture to examine more closely what it is you want to see change and how you can make that happen. Doing so may result in achieving the greater impact you seek for your work and your grant dollars.

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