LIVE! From the Grant Managers Network Conference
Host: Ted Hart
Guests: Delores Estrada – The California Endowment
Myriam Fizazi-Hawkins – National Endowment for Democracy
Iris Garcia – Global Fund for Women
Jen Bokoff – The Foundation Center

Announcer: Welcome to the *CAF America Radio Network*, a production of the Charities Aid Foundation of America. As the leader in global giving, CAF America offers more than 20 years of experience and expertise to corporations, foundations, and individuals who wish to give internationally and with enhanced to due diligence in the United States.

Through its industry-leading grants management programs philanthropic advisory services, CAF America helps donors amplify their impact. This show is dedicated to these donors and the charities they support. CAF America is uniquely positioned to serve as the bridge between these important partners and transforms vision into meaningful action.

Guests on the *CAF America Radio Network* are leaders in their field who share tips for success and stories that inspire. Our host is Ted Hart, the CEO of the Charities Aid Foundation of America. This is a live call in show. Add your voice by calling 914-338-0855. After the show, you can find all of our podcasts at cafamerica.org. Don't forget to dial 914-338-0855. Now welcome the host of the *CAF America Radio Network*, Ted Heart.

Ted Hart: Welcome to this latest edition of the CAF America Radio Network. We're coming to you live from the Grants Managers network conference in San Diego. You can hear all of the people around us and the excitement of this conference. I'm really quite excited to be here, a lot of terrific sessions, lots of learning and a lot of colleagues coming together, including my first guest here today, here on the CAF America Radio Network. I'm joined here by Dolores Estrada, who is the manager of Grants administration at the California Endowment. Welcome to the CAF America Radio Network, Dolores.

Dolores Estrada: Thank very much, Ted. I appreciate the opportunity have some time with folks who really want to learn about the California Endowment process without going online in their grantmaking, so thank you.

Ted: It's a great opportunity for us to learn from experts, experts like you. I want to get right into it by asking you to, first of all, let our listeners know who is the California Endowment, what is?

Dolores: Thank you. The California Endowment is a private Statewide Health Foundation with a mission to build stronger California through improving their health and opportunities for improving the health of their community. We were established when the Blue Cross of California decided to create it for profit subsidiary Wellpoint in 1996.

We're fairly young as a foundation, but we have a wide stretch in terms of our reach through the 58 counties in California. We do a lot of great work. We have a very holistic definition of

health. It's not just about maybe a dental clinic or medical clinic. It's about the things that impact the health of an individual, it's about the environment in the neighborhood, is it a safe neighborhood? Is about transportation, maybe having access to go to a medical facility. It's really a very big broad definition of health and is a really great place.

Ted: Just had the pleasure of having lunch with a colleague of ours who has explained to me the part of the reputation of the California Endowment, is that you folks are quite imaginative that you're always looking for that new innovative approach and that you're very well respected as a leader in the foundation and the giving community here in California.

Dolores: Well, thank you very much, and that is very true. We are very creative and that goes along with our definition of health. What we've done is in 2010, we launched our new 10-year initiative of building healthy community. The idea behind building healthy communities is that we're going to invest the lion's share of our money in 14 communities across the state of California.

With that we want to transform the 14 communities by improving those 14 neighborhoods, giving them the things that they need and having them prioritize what those needs are. Whether it's having a safe neighborhood or having a safe environment in school, having teachers, job opportunities, bike paths, playgrounds, whatever that is that will make that community healthy to the next 10 years.

Ted: Even beyond that you're quite a leader in process. I wanted to ask since our colleagues are listening and they have an opportunity to learn from you that your foundation decided to go paperless. What does that mean?

Dolores: Well, we decided when we launched our 10-year initiative that in order to maximize our investment, one of the things that we needed to do was take away some of the burden of the administrative processing and look at what are the things that we can do to grantmaking more efficient, more effective?

How do we increase the time that we're spending with our grants and investments that makes them and less time on moving paper from one desk to another? How do we increase the value of our investments and take away some of the burden on the grant scheme.

Ted: Of course, it's never a bad thing to do the right thing for the environment as well.

Dolores: Yes, and one of the really great things is that our decision to move to paperless in our grantmaking really came from senior management and the board. They said, "We want to reduce our carbon footprint, we don't care how you do, just do it." With a mandate like that it really gave us the opportunity to again explore and be creative about how we were doing things.

We took some time, and just decided to look at all of the systems that we had in place, how do they connect to each other? What are the things that we could do electronically that were

legally compliant and made sense for our grant scheme. Make an investment to our communities that simplifies their ability to get money to do good job out there.

Ted: That's great. Well, one of the other things that I've done in my career is I'm the founder of the Green Nonprofits Organization and the author of the nonprofit guide to going green. I'm particularly pleased to hear this story about your innovation as California foundation.

What kind of challenges did you encounter? How easy was it to resolve those as you start moving this? Was this as easy as snapping your fingers or did this have quite a challenge to start?

Dolores: Actually, I wish it were as simple as snapping our fingers, but we started planning and started sharing with our staff. These are the steps that we're taking in order to be a paperless grantmaking institution. We did it incrementally, we did it in baby steps. We didn't just like flip the switch, and all of a sudden, we were paperless. That would have been shocking. What we did is we took a very broad approach and looked at all the things that we were doing, what are the things that we can do first that will have sort of an impact, an easy win and give us some sense of how going paperless in our entire grantmaking process is going to look like.

Ted: How's that been received?

Dolores: At first, we had a little bit of a problem because people love paper. If you can touch and feel it, there's some sense security there and we have slowly incrementally moved. We've demonstrated to people the value of having information online of acceptable at any point in time and place and that has worked really well for us.

We have also had a little bit of a learning curve, some people are not as happy as others and so we had to factor that in as we were making the transition. How do we explore teaching people how to use the computer so it benefits them and their work.

Ted: What does success look like for you? Now you've the information, you're getting that feedback. There were probably some tweaking to the original program to actually get you to the point where you're now fully implemented, is that correct?

Dolores: We are probably 95% paperless, so from start to finish, we have a few places in the grantmaking process where we are still using paper. However, I think for the feedback not only in the grantmaking processes, are we doing it electronically, but as an institution, all of our departments and all of our process are electronic and that would be a really wonderful place to be.

Ted: That's the future state of getting there.

Dolores: That is the future state, that's success.

Ted: Would you say that you feel fairly successful at this point, given the big task that you have? 95% is a pretty long way.

Dolores: Yes. Actually, I do feel like we have accomplished a lot, and I feel that the success doesn't come from my own perception, but actually from the comments that I get from our program, the staff, from our grantees, and our applicants. That is the measure of whether we're doing it right or not.

Ted: Has this been able to reduce the turnaround time for you to be able to successfully make a grant?

Dolores: Absolutely. We make and approve grants on a weekly basis, and we pay grants on a weekly basis, so our turnaround time has gone from 120 days, which was 2010, to 40.

Ted: That's incredible, a really great success. What advice do you have for your colleagues who are listening to the show today?

Dolores: I would say, use the resources around you. If you know other funders, other organizations that have gone paperless, then reach out to them. Don't feel like you can't frankenstein somebody else's process to help you. Don't reinvent the wheel. That is the hardest part in going paperless.

Ted: How can our listeners if they're interested, and this is on their to-do list, contact you and possibly learn from this experience?

Dolores: Well, they can contact me by e-mailing me at DEstrada, that's D-E-S-T-R-A-D-A, at Calendow, C-A-L-E-N-D-O-W, dot org. I'm happy to take questions. I'm happy to share my experiences. The best thing about doing the networking and making the connections, which is the same as this conference, is really about reaching out to your peers and having them help you.

Ted: Well, Dolores Estrada, Manager of Grants Administration at the California Endowment. Thank you for joining us so much today on the CAF America Radio Network. I hope you're going to enjoy the rest of the Grants Managers Network Conference. Thank you for joining us.

Dolores: Thank you very much.

Ted: We have another expert here joining us here at the Grants Managers Network Conference. Stepping over to the booth, here, is Myriam, is it Fizazi-Hawkins?

Myriam Fizazi-Hawkins: That's right, very well done.

Ted: You are the Director at Grantmaking Resource Center at the National Endowment for Democracy.

Myriam: Yes.

Ted: Really, quite an impressive organization. Help our listeners today understand a little bit more about the National Endowment for Democracy.

Myriam: The National Endowment for Democracy is a public charity, so we're 501c (3) and we make grants, fund projects in support of democracy in about 90 countries worldwide. Most of our grantees are grassroots organizations that are trying to bring about human rights, women's rights, minority rights, transparency, that sort of thing in their own countries. The average size of our grants is about $50,000, although new grantees we really tend to limit to about 25,000. We make in the neighborhood of 1,300-1,400 grants a year.

Ted: That's quite a lot of work, I know that, because at CAF America we also grant around the world to some 90 different countries. We have 181,000 charities around the world that are eligible with us that we can expedite grants to in about three days. For our donor clients, individuals, foundations like yourself, and corporations that we provide service to. That's a lot of work, and it's a lot of work that is appreciated.

Now, you do this work on behalf of democracy, and working with a lot of grassroots. In that process, I understand part of the reason that you're here with us today is that your group is quite a bit on the leading edge of going paperless. Tell us about that experience and why you think that's important to your organization.

Myriam: One of the things that we found out, is that quite a few of our grantees, although they have small amounts of resources, are perhaps more technologically savvy than most of us in the United States. When we finally went online with an online application process, we got a lot of e-mails from folks saying, "What took you so long? We're so glad you did this." But, at the same time--

Ted: We're just having a picture taken, here. [laughs] Now we're back with the show. Just getting a little publicity shot there.

Myriam: Yes, I'm so glad you did that. There was nothing in my teeth, right?

Ted: No, you look great.

Myriam: Okay, good. Right. We did that really not for the purpose of going paperless, we did it for the convenience of our grantees. We have the same mindset with respect to grantee data security, which is why we started to initiate a process of going online with our board materials. Our bylaws say that our board has to approve every grant that we make.

We're sending out, ahead of every quarterly board meeting, binders full of those 1,300 grants a year's worth of information to our 28 board members around the world and around the country. It was getting to be a little nerve wrecking with respect to looking at all that grantee data, going out through, no offense, DHL or FedEx or whatever, and we didn't know what was happening to the books afterward. We decided we would take our boards to a board portal.

Ted: Certainly, we're all very much aware of security breaches, and it seems that, while it is possible to have security breaches of electronic data, certainly there are many, many more opportunities for data to go awry when a notebook is lost, or someone leaves something in a taxi cab, or even just leaves it on their desk and someone starts looking through this very

interesting book that they have no access to. Of course, the difference between that and any potential problem with digital is there's no way to track that.

Myriam: That's right.

Ted: Even though, and we'll talk about your security measures in the digital world, at least that can be tracked and you can find out who got to that data. Someone who just takes a couple pages off of the notebook or goes and photocopies the notebook and you have no way of knowing that, there's no way to track that.

Myriam: That's right, there isn't. We all know how we all reacted when Target lost our data and it went all around the world. This is even worse. These are situations where grantees are doing work that puts them at risk in their own countries. Their personal safety is at risk, I'm not even talking about their bank accounts.

Ted: Right, to even know they're a part of this grant process could potentially be harmful for them, which is the very nature of the reason you're supporting democracy movements, is that these are people who, in many cases, are taking a risk.

Myriam: That's right, and they, obviously, believe in what they do, that's why they take the risk. We believe in what they do, that's why we fund them. We want the relationship to be one that's based on mutual trust. We are transparent with them about the level of risk and we try to ensure that it doesn't go beyond that acceptable level of risk that a grantee knows they're-[crosstalk]

Ted: We're very familiar with that at CAF America. Of course, we give away millions of dollars a year on behalf of our donor clients, and in many instances there is an interest in having that be given anonymously for a number of different reasons, and maybe that they're funding very sensitive causes, and maybe that they're funding sensitive parts of the world. The ability to maintain that kind of confidentiality is extremely, extremely important. I'm not sure that we would necessarily have individual lives the way that you do, but it has been important for you to move in this direction. Tell us, how has that movement gone? Talk to our audience today a little bit about the digital security of that information.

Myriam: Sure. We always use an iterative process for whatever process change we're trying to implement at the Endowment. That's actually what the Grantmaking Resource Center is tasked with doing. If you're going to make change, do it the right way. Make sure everybody's trained, pilot test before you launch something, document everything, learn from your mistakes, and then do it right the next time. We did the same thing with the board portal. We gradually went to a board portal. We researched more products, we identified the one that best suited our needs--

Ted: You want to share which one you chose?

Myriam: Sure. We chose Director's Desk, which is a Nasdaq product. It is used by corporate boards, and it is also used by a number of nonprofits. It has a double security setup, so that you

must have the password, you must also have a pin to login. The tablet where you type in your pin is constantly moving, the digits are never in the same place, and that just reassured us. When I say we gradually implemented, we are still in implementation.

Ted: Promising so far?

Myriam: Promising so far. The board is on board. They know this is important and we need to do it. They see there's a cost, savings, they understand the risk issue. They're okay with it.

Ted: Another lesson, I'm going to guess, that some folks are still old school and can't quite necessarily move, and is this really an issue of just old school, or is this an issue of security? Because I think sometimes folks who still want to cling to paper, cling to things being printed, are not necessarily seeing a risk factor, they're seeing the convenience factor.

Myriam: Yes, I think you're probably right about that. There's a huge convenience right there. Any product that is trying to market itself for folks like the members of our board has to keep that in mind. These folks are busy, they don't have time to be scribbling around with things online if they can't figure out. It needs to be intuitive. It needs to be a clean interface. If they have an assistant, the assistant needs to be able to have access as well. Which is one thing that director's desk allows us.

Director's desk allows us to turn off the print feature if we want to, so if we really want it to be hard notes about it, we could say you're not allowed to print this book. We are trying to bring them on gradually so we are allowing them to print right now. Essentially you're right, there's this issue of convenience for print. At some point, we're going to have to pull the plug and say, "You know what? The--

Ted: I really think that this is a huge issue in the non-profit sector. That we look to things like Target and things like that, we look at that as being very separate from us, and somehow, magically, non-profits are immune to that. Of course we're not; non-profit websites are being hacked all the time. AIDA is being hacked all the time. I would submit to a lot of our listeners today that we are wholly unaware of the attacks on the non-profit world in a digital way. The corporations, although, they get to celebrate the bad news in the press, they're very much more aware of that than we are, and data in the non-profit world is being stolen every day.

Myriam: I think you're right about that, you're absolutely right.

Ted: So I really applaud you in thinking about this, in thinking in this direction because I think not only are you doing the right thing for your organization, but you're setting an example for non-profits who have data security nowhere even on their to do list.

Myriam: Well, that's very kind of you to say. I have to say that we are not on full implementation yet. When we are, I will give you a call, and you can praise me again if you'd like and I would deserve it at that point.

Ted: I think even just moving in this direction, putting in that on the table and the hard work of getting directors and trustees on board to that because it is a different way of doing business, and it's not just a matter of, "We've decided we're big tech people, we're going to make you do this." There's a very real business reason to do this.

Myriam: Interestingly, it's the folks who are on corporate boards who are already using some kind of board portal who are okay with using this board portal regardless of generation. I just want to put that out there and it's not actually--

Ted: We didn't mean to suggest that this is a generation thing, yes.

Myriam: You could say that yes there's some generational elements, but that's not the only thing it's like. It is also familiarity with this kind of product. People fear change, they don't want to mess anything up. They don't want to look stupid, "I don't know how to do this." They don't want to call lowly old me and say, "I forgot my password, can you help me with this?" We try to be very non-threatening and helpful.

Ted: Now let's talk about the internal. We've talked about the director level, trustee level challenges, which are going to be there for any organizations so, you're having some growing pains in that area so will everyone else. What about internal implementation? Has it been maybe a little bit smoother with staff or are there still challenges there?

Myriam: You know that's actually a very good question. Yes, it has been a bit smoother with staff, especially staff who are managing portfolios of grants where they know personally grantees at risk. It's a little less smooth than the more senior level staff who have not managed grants portfolios and you can get copies of the same book, that's the board members to get, and don't quite understand why they can't still get paper. We're weaning them off of that. Again, we're trying not to be too brutal, we're doing it very gently, but we are weaning them off of that.

Ted Hart: Well, again, terrific work. Can you give your best advice to our listeners today in terms of what you've gone through and what you think really worked well and what they can learn from you in terms of this experience?

Myriam: Sure, my best advice is do your research carefully, pick a product that actually works for you. Then, be very patient with implementation. Always do a pilot test before you launch anything. My motto is always eventually is my friend."

Ted Hart: Eventually is your friend?

Myriam: Yes, things don't have to happen right away.

Ted Hart: That's great. Well, you certainly are leading the way for a lot of non-profits. How can our listeners be in touch with you if they would like to?

Myriam: I can be reached at myriamfh@ned.org, and that's M-Y-R-I-A-M-F as in Frank-H-@-N like Nancy-E-D.org. I will be very happy to hear from you.

Ted Hart: Myriam Fizazi-Hawkins is the director, Grantmaking Resource Center at the National Endowment for Democracy. She's been my guest here today on the CAF America Radio Network. I can not thank you enough for joining us here at the Grants Managers Network Conference.

Myriam: Thank you so much for having me.

Ted: Enjoy your time here in San Diego. All right we're going to take a quick break here on the CAF America Radio Network and we're going to be back, joined with a couple of additional experts. We're here at the Grants Managers Network Conference.

Broadcast: Remember, our podcasts and archives are always available 24 hours a day at cafamerica.org. If you're listening today, our phone lines are open. Call in and ask a question by dialing 914-338-0855. Now, back to the CAF America Radio Network and our host Ted Hart.

Ted: We are back here live at the Grants Managers Network Conference here on the CAF America Radio Network and I'm joined by a couple of additional experts that are joining us here at the Grants Managers Network Conference here in San Diego. Iris Garcia is here and she's the Program Officer, Grants operation at the Global Fund for Women. Welcome here to our show, and why don't you say hello first?

Iris: Hi, I just want to thank you for having me on your show, I'm happy to be here to represent the Global Fund for Women.

Ted: Terrific. Also joining us here is Jen Bokoff who is the Director of GrantsCraft at the Foundation Centre. I'm really very interested to get a chance to talk to both of you. Both of you are presenting here at the conference, is that correct?

Iris: We actually both just ran here from our own presentation.

Ted: We were going just a couple of minutes to make sure that we got here. So your presentation here at the Grants Managers Network Conference, you discussed the concept of social change in grant making and I think this is you, right, Iris? What are the main aspects of this ideology? What have you found to be challenging about implementing it at your own organization?

Iris: Thanks. Just came from this great session. I was co-directing it with Wellspring advisors, Greengrants and the Christensen Fund. Social change in grantmaking, the three elements that we presented on, that we thought would be the most relevant for grants managers. One is this idea of partnering with respect, and it kind of hearkens back to this idea of cultural competency that you hear about in international event making circles. The idea is to really come with a partnership approach, to acknowledge the power dynamics that exists between grant seekers and grant makers, and then try to align the visions of change between

the donors and the grantees. We find that one thing that can be really empowering is giving general operating support and that really avoids the imposition of project based funding onto grantees.

Ted: At its, root it's sort of the simplest form of what you're talking about. Is this really a concept of not assuming just because you have the money you have the solutions?

Iris: Exactly. We really find that our grantee partners are best positioned to come up with the solutions to the challenges, and injustices that they see in their communities and in their countries. So there's an element of trust there. So other elements that we find to be particularly useful when thinking about social change in grantmaking is enabling of feedback loops, so soliciting feedbacks, relying on the expertise and experience of our grantee partners, making improvements based on that feedback. Then closing the loop by letting the grantees know that you've made changes based on their input, so they're not just offering up their knowledge into this void.

Ted: For CAF America this is particularly interesting for us because this is the largest intermediary, we have offices on six continents. CAF America is part of a large network of CAF offices around the world, and we've grown 46% year over year. For us this whole issue of cultural competency and really understanding the impact of grantmaking is extremely important and that we're so glad that you're speaking to. When I asked you, do you feel that, this is a call to a generational change in funders, because it has sort of been a general sense that if I have the money or I got to a certain position then I do have a solution and that's why I got there with the money.

Iris: I see that there's a little bit of a trend of not wanting funders to be reactive and wanting them to be proactive with the change that they want to see. I believe there's a way of doing that in which you really are coming at it as an ally and not directive. The other thing is that it's really easy to lay out the terms of engagement, as a grants' manager, as a founder. What's not easy is this idea of flexibility, of being accountable, of really engaging in feedback and learning. It's tricky it takes time and I think that some people shy away from it because of the human resources and the time that it takes.

Ted: Since there's a concept of approaching this is as ally really is a change in the way that you view yourself as a funder as opposed to someone who's bringing solutions to sort of the great unwashed who don't have access to solutions, that's a very different approach, right?

Iris: Yes, although I do see a lot more of our partner funders coming from that approach and especially a grants manager's network, I mean more and more folks that are coming through it like that. The idea for a Global Fund for Women, we've been around for 25 years. In those 25 years we've made over a Million Dollars in grants in 175 countries to advance the rights of women all over and we really try to see ourselves as an actor in the movement, and what we bring our resources we can bring influence, we can maybe bring capacity building, but we really want to be a part of the movement and accountable to the movement, that's how we see social change is happening.

Ted: That's true. Right now I want to make sure that I bring Jen Bokoff into our discussion here. There're few changes on the horizon for GrantCraft which is a wonderful program with you and with partnership, the website and types of content, what are some of the changes that our listeners today can look for? Can you tell me a little bit about the strategy behind them?

Jen: Sure, at GrantCraft which is a service of the Foundation Centre we've had a lot of developments and exciting growth over the last couple of years. Most recently an increasing change is that we're taking sole ownership of GrantCraft and we've had a phenominomal--

Ted: Talk about change because it hasn't always been sole ownership- [crosstalk]

Jen: It hasn't always been sole ownership. The one minute version is GrantCraft started as a project of the Ford Foundation back in 2001 and about three years ago became a joint project of the European Foundation Center based in Brussels and the Foundation Centre based in New York, with the idea that each of our organizations are hubs for funders. With being a knowledge too directly aimed for funders and helping them to improve their craft, they would have many more points of access.

We had a phenomenal collaboration the last three years and learned a lot in the process. Actually, Brad, the head at the foundation centre and Jerry the head of the European Foundation Center just published a great article in alliance magazine about our collaboration and sort of the strength and challenges to working across an ocean. We ultimately decided together that it will grow better as a service of the foundation centre because we're not membership based and we can better sustain sort of a deck of online resources.

Ted: Now that this is going to be sole source, give us a sense of what's going to be in GrantCraft and what kind of changes are being brought to it now that there's sort of one bar?

Jen: The one thing that we started over the last few years is just simply a lot of our content we have phenomenal partners overseas, one example would be the China Foundation Centre which in the last five years has gone from having no resources to a whole library of resources and they've actually translated 31 of our GrantCraft guide. We have more than 75 translated resources and that will continue to grow in the next couple of years, and that'll stay in content type. We've started to develop info graphic as an example which we've never had before, but especially as folks increasingly want byte-sized information and not 38-page guide, we're growing into info graphics and podcasts and webinars blog posts. We've had more that 30 guest bloggers in the last couple of months and that's going to continue to grow.

Ted: Well, of course we're thrilled that you're at our radio show today which will be podcast immediately after this show.

Jen: Fantastic. [chuckles]

Ted: Available free on the internet at cafamerica.org.

Jen: Free?

Ted: How can grant managers become successful advocates of social change which is of course what brings both of you together; Iris and Jen talking about this because this is a shift, and we're certainly seeing it here at the grants managers network conference. I think a lot of the folks who really get it and understand it are here, so we could learn from each other, learn from you folks, but how best to understand how those who're listening today can be successful advocates of this important change?

Jen: Sure, I'll take a first stab and then maybe Iris can round out the answer. I think of grants managers have a really unique position in their organizations where they're not always empowered to actually make decisions or voice their strategic opinions, but it doesn't mean that they don't have them, so picking the personal initiative to educate themselves, so using resources like on our GrantCraft site, but also whether it's in the field, IssueLab is a great place to go. It's a library for the non-profit sector that's solely online. 14,000 resources and all different topics For grants managers to go and educate themselves and bring something tangible to the table, I think makes them a lot more of a player in what their organization is doing and lets them better participate in the change process.

I'll I see what else Iris wants to weigh in, because this is off the rally. [crosstalk]

Iris: Very much is.

Ted: For social change and the barriers.

Iris: I will first say that grants managers are often on the front line in terms of interacting with the grantees on daily basis of understanding the context in which the grantees work and really being able to bring their voices into decision making spaces in their organization.

The other kind of aspect of grants managers is that we really operate at annexes of program staff, finance staff, evaluation staff, information management and we tend to build really strong relationships within these organizations because we're working frequently across teams. You can really leverage with those relationship in order to make sure that changes in the organization are bringing into consideration the voices of grantee partners and their feedback and their input.

Ted: That's great. Now, GrantCraft just released their report, tell us what is this report about, where can folks find it and why is it important that those attending the grants managers network conference and those who are listening to this radio show today know about this report?

Jen: Great, the report that we produced is called the *Opening up: Demistifying Funder Transparency* and we produced it in collaboration with Glasspockets which is our initiative to encourage transparency at foundations. In developing this resource, we interviewed more than 25 funders from around the world and different types of foundations; small and large; private anf community, and to develop not only a guide, but a set of related content like a survey and

podcast. When we wrote the report we actually divided it into five chapters because transparency can be a really scary topic and a lot to digest all at once, so we organized it into five different ways that funders can be more transparent; everything from sharing with pure funders, internal reports to figuring it out how to communicate using different medium. We started the guide by actually defining transparency which is a buzz word and I don't like buzz word, so we narrowed it down to a mindset of openness, and when you read the guide you can sort of hear more about that.

We also debunk a lot of myths, like how transparency takes a lot of time which is one perception and that internal reports should stay internal which is the complete opposite of what should happen. We profiled some really great examples of funder transparency that's already out there, for instance, Hewlett has great interactive database of all their grants online, so we write about that and how the **Irvine Foundation** post their executive compensation; just submitting your form 990 isn't really enough for making that information easily accessible.

Ted: Right.

Jen: It's accessible, but not easily. Profiling great examples like that and then exploring some of the more innovative approaches. One example that we write about is how the Parker Foundation actually did their whole organization strategic planning process publicly using their website and actually soliciting input from other people. Their constituents ranging from their grantees to the public were all a part of the process. You can read all of that in the guide which is at grantcraft.org/transparency.

Ted: That's terrific. This habit of transparency of course has so many different facets to it and I think increasingly we are in a very competitive world as well, how do you bridge the gap before our listeners today who are saying, "Well, I'm all for transparency and that's really terrific and I think everybody else should be very transparent because we have competitive advantage or we're looking to get competitive advantage or we are proprietary information." How in the market place of ideas do you bridge that gap?

Jen: Yes, that's a really good question. I think there are ways that funders can be transparent without any more work, with being proprietary as an example, you are a foundation commission a $50,000 report on a program that you're doing. The Oak Foundation based in Geneva did this with an international human rights program and they never intended to share it because, hey they sent this money for their internal report, it was using one of their internal data and resources, both were in professional contact. Then when they got it they just sort of realized that this is good stuff that a lot of other people in the field either can't afford to do or haven't taken the time to do or who don't see the value in it. It's this light bulb that goes off to be honest. I don't think you can reconcile it with a bottom line benefit, but it's this light bulb that goes off to say, "Why not share this for the benefit of the field."

Ted: It's similar to one of the reasons why CAF America does this radio show is because people don't always have access to experts like the two of you and through this show, they can learn

and hear about topics that they really want to and know that they need to, but who has the time. Being able to go and hire consultants to talk to them about the topics that we talk about on a radio show could also be prohibitive. Just as we're sharing this information and you're sharing the information that the two of you have available, does that set an example to say, "This is really the way that our industry should work."?

Iris: I hope so. We're actually redesigning our GrantCraft website, that's another team so that's a foot and that'll be launched in the summer. One thing that we'll be doing is making it easier for any funder to share their own wisdom. We started because we wanted to be a curated set of resources from funder knowledge, but part of the problem is that there was never an easy way to share that knowledge without somebody calling you and interviewing you.

On the new site, it'll be a platform, hopefully, that folks will take advantage of to say, "Hey, I have something I want to share." Whether it's a report or a project that they funded that they had an "aha" moment and they just want to write about that process and what went well and what they could possibly improve on. We're hoping to become a platform for that too.

Ted: Well, it is great to have both of you on the show. I'm going to ask a question for both of you to weigh in on here. That is, we've talked about transparency, we've talked about cultural sensitivity and we've talked about bringing social groups together. These may be on the list, but what are some of the most important trends that you're seeing in the grantmaking field apart from the things that we've already talked about today?

Iris: Well, I'll just jump in. I went to a great session yesterday. I think that I'm really seeing this as a trend externally which is as you know, Global Fund for Women does International grantmaking and what we've been seeing is governments around the world, instituting really restrictive laws on NGOs receiving foreign funding. How that ties into what we were speaking about earlier, is you have to then be very committed and creative and flexible to continue supporting groups that are in these contexts that need the funding the most. That's definitely a trend on the rise and it's something that we keep a really close eye on.

Ted: Yes, in CAF America, we stay ever vigilant on changes in laws around the world. Because we fund some 90 different countries, we're funding thousands of charities around the world and so making sure that there are still access to those philanthropic dollars and finding ways as you said, sometimes to be creative and helping have that access. Because to not fight for that, to not be committed to that is to say that there are parts of the world that would be shut off from that. What do you think, Jen?

Jen: Well, I'd highlight key trends that I think actually go together hand in hand. The first trend is that funders are being a lot smarter about pushing for outcomes and really looking at impact, instead of just writing a check and being done with it. That's more innovative grantmaking. Then the thing that goes hand in hand with is more collaboration, not just in the sector among funders, but with funders who see their role as a convener and able to stimulate conversation and action beyond just grant dollars.

One example that I would actually give is that there's this Health Care Collaborative of funders in Kansas and Missouri and they actually have come together to create the advocacy evaluation Learning Initiative and together, they're talking about not only the ways that they can actually measure the effectiveness of the advocacy initiatives that they're funding, but also who's funding what and how they can do it more effectively.

There are also maps out there, like new visualizations using technology, like watch funders which came from a group of funders, including Hilton, Gates Rockefeller and Buffett coming together to say, "Hey, we want to know who else is on the map for water access, sanitation and hygiene funding, without just having to pick up the phone every time and try to fill in the gaps of that landscape."

These maps are popping up to show actual funders and where they're giving and that's encouraging that collaboration. Then as a result, the funders, when they pick up the phone, they're not calling to find out the basic funding information, they're saying, "How can we be more strategic?"

Ted: Yes, and I think that's a very important trend to see, just to have a knowledge of what else is happening, but one of the things that you put on the table, I think, is also a growing stress within the industry. That is this growing desire to have impact to say, "These are the three outcomes that you will produce if I give you this money," which, Iris, it goes back to what you were saying before and that is what you would like to see as the desire towards less restrictive giving to give the ultimate recipient the opportunity to really grow and to define that themselves.

We have this really push and pull between, I really need to have the outcomes and I need you to measure everything, and therefore, I'm telling you what to measure and what the outcomes need to be versus the point that you made earlier on in the show. Help us with that bridge or is that just a stress that is there and we have to be aware of it?

Iris: I think it is attention I think that a lot of funders are dealing with that right now. It's really emphasis on impact. Again, if you give a general support grant, it doesn't mean that you don't understand what the goals of the groups are. It just means you're not dictating. For the Global Fund for Women, we recently went through a process where we focused our scope a little bit on three impact issue areas, which are achieving zero violence, political and economic empowerment and sexual and reproductive health and rights.

We went from six really broad thematic areas to really try doing an in depth analysis about where our grantmaking dollars are going to be the most effective, still relatively broad and then we can work in partnership with our groups. Again, we can offer this is what we are trying to do, what are you trying to do? Let's see if there's a partnership as opposed to imposing a lot of measurement standards on them.

Ted: Are there other ways to deal with this, Jen?

Jen: Yes. Well, I was going to build off of that last point of working together to figure out what you want the outcome to be in a way that's aligned both with the foundation's goals and the grantee's goals. When I was a funder in my previous position at a private foundation in New York, we actually had a great partnership with the city on the New York City green card initiative. It was an initiative that provided permits for vendors selling fresh fruits and vegetables in underserved neighborhoods. While our grant was really to incubate that project, it was $1.5 million grant over three years.

The actual and which obviously requires significant measures and evaluation, those metrics that we had come up with initially, are not all the ones that we ended up measuring. Because we thought the measurements shift a little bit. The things that actually were measurable and the things that made sense to measure to help shift the direction of the project and actually learn something instead of forcing numbers that weren't going to fit. That was a real nice partnership of working together with the city and with vendors and with a consultancy, to figure that out together. There was still the push for the impact measurement, but not the ones that we planned on.

Ted: That requires funders to be flexible and not just saying, "Here's the contract and these are the measures. You missed the measures." There is a requirement to stay engaged in the dialogue, in the discussion and to look at data along the way to say, "Well, actually, we're learning something that we didn't expect to learn and maybe that's just as valuable as where we thought we were going to go." How possible is that for funders to have that kind of flexibility?

Jen: Nimbleness?

Ted: Yes, it's a nimbleness that you don't generally attribute to funders.

Jen: You really don't, and I mean, we all know the saying, you know one foundation, you only know one foundation. I don't think we can actually really answer that. I think in some settings it's easier to be nimble than others, but it does take people within a foundation speaking up and saying, "Hey, I'm observing this and I want to let everyone know that now we have time to ruminate on it and I'll mention it again and again and again. Eventually, we can act on it." Because I don't think the foundation world moves any too quickly on new ideas, but I also think when you ruminate on it, you can be nimble over time.

Ted: I really think today we have put on the tables that some initiatives that really point in a very different direction from the funder community that we might find that we have right now a much more transparent, collaborative and nimble funder class. How do we get there and do we see any trends that would say that's going to happen?

Iris: Well, I've heard some research that social change grantmaking is actually on the rise. I think we can all do our part by proselytizing what we see as being effective. I think a lot of funders are scared, they're scared around issues of compliance, legality and not wanting to rock the

boat too much. I think that if we can offer examples from our own experiences or experiences that we

know about and build this community where we support each other and advocating for this type of change. I'm fairly hopeful.

Ted: I think the more often you see stories of that kind of nimbleness shared and celebrated, the more often that you'll see other folks saying, "Well, that's an accepted opportunity, we ought to be looking at ways that we can do that."

I think for some funders, it certainly does feel like, "But we just keep changing what we're looking at to match the data," than, "Are we in any way being consistent in the way that we're reviewing our grants." That's difficult to really think of, so what words of wisdom do you have for us, Jen on that?

[laughter]

Jen: Words of wisdom. I think we're in a really great time of technology right now where even 10 years ago, it just wasn't easy to have open dialogue happen publicly and transparently. I'm seeing more and more foundations starting to share like through the Hewlett blog series on transparency where we're hearing from important people at that foundation, the strategists, the real leaders and movers and shakers, their honest, candid responses about what their foundation is doing and why they're doing it and what they're changing.

I think if more foundations can sort of leverage these new communication platforms--

Another good example is at Robert Wood Johnson Foundation, all of their program officers are tweeting. It sounds so silly, like how is there 140 character tweet going to help improve this nimbleness and ability to be smarter grantmakers, but it encourages dialogue that wouldn't happen otherwise.

Ted: Also, I agree with you and that's why I asked you that question because I knew you would point to technology as being part of that solution. We've got about six or seven minutes left on the show today.

I think all the things we put on the table are important because it is a much more diverse world. The interest in international grantmaking, we certainly see CAF America on the forefront of international grant making, and we're seeing all these trends.

I think if we want to see that there's going to be a funder class that is going to support that, it is going to be because technology points to the fact that they're not alone. I think that when you don't know what others are doing and when you don't see transparency actually working and when you don't see the social changes possible, then you retreat to the tried and true, this is the way we do it, and I'm sorry it might not be convenient, but this is the way that we've always done it.

When you see that others are taking risks, see that they are leaders that you respect, and the more that we can tell their stories, I think in a very broad way which, of course, technology allows us to do today, then we do have a chance to see the next 10 years be radically different in meeting the needs of a changing world.

Before we end today, we're going to start with you Iris, how can our listeners today contact you and if they want to explore further the incredible amount of wealth of knowledge that you brought to us today. How can they reach you?

Iris: I would first suggest going to Global Fund for Women's website, www.globalfundforwomen.org. You can come and learn a little bit about our programmatic approach, about our learning approach, about changes we've recently made and you can go ahead and email me. My email address is igarcia@globalfundforwomen.org. I'd be really interested in hearing any questions or having follow up conversations with any of the listeners about the topics that we've discussed today.

Ted: Terrific, and Jen, how can listeners reach you?

Jen: How long do I have? [laughs] All sorts of ways to get in touch.

Ted: We've got a couple minutes, and really give us a full list because I do want to make sure that people know how to also get the data that you have as well.

Jen: Fantastic, so I will take an extra minute then because GrantCraft is a part of the foundation center. First, a way to get in touch with me, I'm on Twitter @Jenbo1 and my email address is jen@foundationcenter.org. I also blog, if you're interested in my personal musings, at jenbokoff.com.

Then, with GrantCraft, the website is grantcraft.org, and we also have links off of that to other tools like our collaboration tool finder, which is collaboration.grantcraft.org, and that's a tool to help funders figure out how to leverage technology to collaborate together.

Then GrantCraft is a part of the Foundation Center umbrella, and so that's foundationcenter.org, and their Twitter handle is fpncenter. Then some of the other services at the foundation center that I mentioned during this podcast was the IssueLab, is the library for the non-profit sector, that's issuelab.org. Everything on it is completely free as is GrantCraft, and you can also contribute your own organization reports, so that's a great action step you can take after this podcast.

Grasspockets.org is the home of the transparency initiative, washfunders.org, that's the water access sanitation and hygiene portal, and we also have BMA funders, blackmaleachievementfunders.org which is a really neat one as well.

The other thing grant managers who are listening can do is become an e-grant reporter, which we didn't even begin to talk about, and I'm not going to get pitchy, but it's- [crosstalk]

Ted: I did want to ask you because obviously, most of our listeners are grant funders, are philanthropists who are listening to our show, and part of what you're looking for is more reporting and where they're giving, so that they can join this global approach to knowing what's going on and who's funding. Very quickly, in about a minute, can you give us something on that?

Jen: I can do better. I can do 30 seconds. Our database comes from the forms 990 that foundations have to fill out and file with the government anyway, but we also have a lot of international funders and other funders who are e-grant reporters represented in our system.

E-grant reporting basically means that when you, a grants manager enter a grant into your grant management system at your own foundation, you could then send us a digital copy of that set of grants and we can include it in our system. What that means is we can set a report on trends in the sector and build more tools to help you collaborate and be smarter about your grantmaking and scanning the landscape.

Ted: The bottom line is if you want others to collaborate, you have to collaborate too. It really is a two way street.

Jen: Ted, we need you as an ambassador. [laughs]

Ted: To stand on one side of the street and say give me all your data because that would really be helpful to me, but yes I'm not going to be transparent in sharing your information, it's just the wrong approach.

Iris: Yes, you need something by example.

Jen: It's the wrong approach and I'll just share this one anecdote because I think it's really telling. When a group of Chinese ambassadors was here a few years ago, they looked at the maps that we were showing of grants of foundations that were housed in our system, and they said, "Hey, we want to be on that map." That's where the data sharing began and I think that that began a really nice collaboration of sharing our data, and I think more foundations can hop on board with that concept.

Ted: This has been absolutely a delight for me and just an opportunity even just to spend time with Iris Garcia and Jen Bokoff here on the CAF America Radio Network. This is Ted Hart your host. We tweet at CAF America, and I personally tweet at Ted Hart, so please follow us. We look forward to you joining us for the next edition of the CAF America Radio Network.

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