

Top 10 Lessons Learned in Grantmaking

Presented by:

Caroline Altman Smith and Helen Davis Johnson



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THE KRESGE FOUNDATION

Presented by: Caroline Altman Smith

Caroline Altman Smith, a senior program officer for The Kresge Foundation's Education Program, helps oversee the Education team's domestic grantmaking, which awards funding to higher education institutions and national nonprofit organizations that are working to improve access and success for underserved students in undergraduate education.

Before joining Kresge in 2008, Caroline served for five years as a program officer at the Lumina Foundation for Education in Indianapolis where she worked to create college opportunities for low-income, minority and first-generation students to enter college and complete their postsecondary degrees successfully.

A graduate of the University of Virginia, Caroline holds a master's degree in philanthropic studies and a certificate in nonprofit management from the Lilly Family School of Philanthropy at Indiana University. She currently serves as an instructor with The Grantmaking School at Grand Valley State University.



THE KRESGE FOUNDATION

Presented by: Helen Davis Johnson

Helen Davis Johnson serves a program officer on the Arts & Culture team at The Kresge Foundation, working to elevate the effective use of arts and culture in transforming and revitalizing communities.

Before joining the foundation in 2012, Helen co-founded CreateHere in Chattanooga, Tenn. CreateHere attracted and retained creative community residents through a relocation incentive resulting in home sales exceeding \$4 million, built a fellowship program and a grants program.

She studied at the Florence Academy of Art and earned a bachelor of fine arts from the University of Tennessee at Chattanooga. Helen serves on the advisory board of LearnPhilanthropy.



THE KRESGE FOUNDATION

Lesson 1



Humility

- It's a privilege to steward funds and make decisions to benefit others.
- It's not your money, and you're not the one doing the toughest work.
- Importance of not being a foundation "fortress," and providing good customer service.



Lesson 2

Understand your foundation's culture

- The more clearly and quickly you understand how things get done internally, the more effective you'll be.
- Understand that everyone on staff plays an integral role in the grantmaking machine.



Lesson 3



Content expertise

- Find your passion, and develop expertise in something.
- Professional success requires a mix of grantmaking skills + content expertise.
- Stay curious and keep learning.



Lesson 4



Sit at the Table

- Stay 'present' in meetings and participate fully.
- If you *don't believe* you have something to say, your voice won't be heard.
- Stay in the room: be ready to contribute and stick around, even when the conversation and the situation get tough.



Lesson 5



Collaboration

- **Partnership building: if you want to go far, go together.**
- **Money and time are in short supply.**
- **Importance of people, negotiation and mediation skills.**



Lesson 6



Be Creative and Adaptive

- **Be flexible in order to be responsive.**
- **Be creative to strategically shape a grant so it both accomplishes your objectives and benefits your grantee partner.**
- **Be prepared to fail.**



Lesson 7

Constructive Feedback

- **Seek it out, and ask for help and advice.**
- **Can do this more formally with existing tools.**
- **Learn from interactions with grantseekers.**



Lesson 8



Learning and Evaluation

- **Understand clearly what your goals were from the beginning and how what you've learned aligns with your original intent, or not.**
- **Requires both data and storytelling, quantitative and qualitative information.**
- **Draw upon knowledge gleaned from past and present experience and apply it to your future investments.**
- **Develop a learning orientation and knowledge of different evaluation models that can inform your work.**

Lesson 9



Fundraising

- Can be great preparation for grantmaking.
- Persuasion and making the case: serve as an advocate for your grantees.
- Internal (your team, senior staff, board) and external (other foundations and partners).



Lesson 10



Communicate clearly

- **Internal and external communication are important.**
- **Be clear and efficient.**
- **Know your organization.**
- **Listen as much as you speak.**





Questions?



THANK YOU FOR YOUR PARTICIPATION!

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Email: murphym1@gvsu.edu



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