

Exiting Responsibly: Best Donor Practices in Ending Field Support



COUNCIL *on* FOUNDATIONS

A Study for the Robert Wood Johnson Foundation

Janice Petrovich, Ed.D.



Robert Wood Johnson Foundation

August 16, 2012



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Welcome



Keith Greene
Director, Membership
Council on Foundations

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Agenda

- Introductions
- Best practices for discontinuing funding in a field, while promoting sustainability
- Q&A

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WebEx Tips

- To expand or collapse a panel, toggle the arrow (▶) or (▼).
- All phone lines are on mute.
- Questions? On the Q&A Panel, type your question, select "All Panelists," click "Send."
- This webinar is being recorded for self paced learning.

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Moderator



Debra Joy Pérez
Assistant Vice President, Research and Evaluation
Robert Wood Johnson Foundation

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- Impact from grantee budget reductions
- Updating philanthropic business models
- Streamlining the grantmaking process
- Improving employee performance appraisals
- Becoming a web 2.0 philanthropy
- Developing a logic model for social media use

Feel free to submit a question at any time. Use the "Q&A" panel on the right navigation bar. Type your question, select "All Panelists" and click "Send."

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Speaker



Janice Petrovich, Ed.D.
Philanthropy Consultant



Outline

- Purpose and methods
- What is a field?
- How do funders build fields?
- What is a successful field exit?
- Timing field exits
- Assessing field sustainability
- Concluding thoughts



Poll 1

Have you participated in a foundation field exit process?

- a) Yes
- b) No
- c) I'm not sure

Use the "Polling" panel on the right navigation bar to respond to the poll. Select your answer and hit the "submit" button.

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Purpose

Identify effective practices to promote the sustainability of fields as donors exit.

Feel free to submit a question at any time. Use the "Q&A" panel on the right navigation bar. Type your question, select "All Panelists" and click "Send."

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Source

- Literature review
 - RWJF Retrospective series
 - Field – building, foundation exits

- Interviews (31)
 - Diverse nonprofits and funders

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Feel free to submit a question at any time. Use the "Q&A" panel on the right navigation bar. Type your question, select "All Panelists" and click "Send."

What is a field?

- Knowledge
- Policy
- Practice
- Requires:
 - Information (facts, models, messages)
 - Diverse actors
 - Collaboration

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Elements of a field

Shared Identity	Diverse & Steady Funding
Research Evidence	Diverse & Interconnected Constituencies
Effective Leaders	Policy Advocacy
Proven Programs	Strategic Communications
Quality Standards	Constituencies that can Mobilize
Knowledge Exchange	Assessment of Progress
Structures for Collaboration	

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Poll 2

Do you anticipate that you might be part of a foundation field exit in the next 2-5 years?

- a) Yes
- b) No
- c) Maybe

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Use the "Polling" panel on the right navigation bar to respond to the poll. Select your answer and hit the "submit" button.

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Successful Exits

- Respectful process
- Promote sustainability

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Indicators of Success

- Exit timing and reasons are clear
- Actors help shape final support
- Key organizations survive
- New leaders
- New knowledge

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Indicators of Success (cont.)

- Effective practices
- Institutional changes
- Field actors connected
- Policies advance
- Public support

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PROCESS: Top 10 Donor Practices

1. Communicate clearly, early, often
2. Consistent message; diverse modes
3. Involve CEO
4. Inform, train all staff
5. Invite comments

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PROCESS: Top 10 Donor Practices

6. Participatory impact assessment
7. Publicize successes
8. Participatory needs analysis
9. Attract new donors
10. Wind-down support

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Poll 3

(Only for those who have exited fields)

After exiting, have the program areas that you previously invested in survived and thrived?

- a) Yes
- b) No
- c) Too soon to tell

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Use the "Polling" panel on the right navigation bar to respond to the poll. Select your answer and hit the "submit" button.

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<u>LIKELIHOOD OF FIELD SUSTAINABILITY</u>		
<u>LOWER</u>		<u>HIGHER</u>
New field	↔	Existing field
One major funder	↔	Many funders
New organizations	↔	Established organizations
Broad problem area	↔	Specific problem area
Little knowledge base	↔	Significant knowledge production
Few actors	↔	Multiple and diverse actors
Low public awareness	↔	High public appeal
Scattered practices	↔	Institutionalized practices
Unchanged policies	↔	Policies enacted and implemented
Disconnected actors	↔	Highly interconnected actors



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Timing Field Exits

- Assess field sustainability
- Strengthen field elements
- Implement best practices process

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Concluding Thoughts

Promoting sustainability: Trends to resist

- *Avoiding risk*
- *Short-term focus*
- *“Obsessive measurement disorder”*
- *The survival of the fittest*
- *Others will fill the gap*
- *Total field disengagement*
- *Cleaning out and closing down*

Feel free to submit a question at any time. Use the “Q&A” panel on the right navigation bar. Type your question, select “All Panelists” and click “Send.”

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Q&A

Use the “Q&A” panel on the right navigation bar. Type your question, select “All Panelists” and click “Send.”



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Speaker Information



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