

# Strengthening Funded Partner-Funder Relationships Through Honest Conversations ~ 2021

St. Louis Funders Learning and Evaluation Group (FLEG): Grantee Voice Committee

**FLEG Grantee Voice Goal:** To develop new, or enhance existing, grantmaking practices and cultures that seek and incorporate the perspectives and input of funded partners in order to build trust, increase transparency, and reduce the burdens on funded partners.

## Members Include:

Steven Brawley (ARCHS)  
Kristin Cowart (MHB)  
Trisha Gordon (United Way)  
Katy Keller (Marillac Mission Fund)  
Jenny Lynch (STL County CSF)  
Stacey Morse (The Morse Group)  
Treena Thompson (Lutheran Foundation)

## Background

In March 2019, the FLEG Grantee Voice Committee sent a series of polls to 170 local Funded Partners and Funders to gather candid feedback on three topics: communication, grantmaking and relationships. In August, the committee hosted a workshop for Funded Partners and Funders to come together to use the data gathered to make recommendations regarding practices that increase trust, transparency and efficiencies within the Funded Partner-Funder relationship.

As a follow up to this work, in 2021 the committee hosted a series of virtual convening opportunities and surveys to gather feedback from Funder Partners and Funders regarding changes that have occurred in local philanthropy within communication, grantmaking, relationship and racial equity (\*added in 2021), as well as to better understand the changes made and new strategies implemented which have been most helpful since the onset of the COVID-19 pandemic.

Included in this report are summaries of the themes most frequently shared by both Funder Partners and Funders.

## What We Learned

1. Changes made by many Funders are in alignment with trust-based philanthropy practices.
2. Many changes made by Funders in 2021 were in alignment with what Funded Partners recommended in 2019 (see virtual convening results - page 2)
3. Funders perceived their strategies to be more helpful than Funded Partners reported (see survey results - page 3).

*Note: Funded Partners were asked to respond to questions with all Funders in mind, while the Funders who chose to participate were those most likely to be engaging in change.*

## Trust-Based Philanthropy Practices

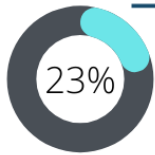
<https://www.trustbasedphilanthropy.org/practices>

- Give multi-year, unrestricted funding:** The work of nonprofits is long-term and unpredictable. Multi-year, unrestricted funding gives grantees the flexibility to assess and determine where grant dollars are most needed, and allows for innovation, emergent action, and sustainability.
- Do the homework:** Oftentimes, nonprofits have to jump through countless hoops just to be invited to submit a proposal. Trust-based philanthropy moves the onus to grantmakers, making it the funder's responsibility to get to know prospective grantees, saving nonprofits' time in the early stages of the vetting process.
- Simplify and streamline paperwork:** Nonprofits spend an inordinate amount of time on funder-driven applications and reports, which can distract them from their mission-critical work. Streamlined approaches focused on dialogue and learning can pave the way for deeper relationships and mutual accountability.
- Be transparent and responsive:** Open, honest, and transparent communication supports relationships rooted in trust and mutual accountability. When funders model vulnerability and power-consciousness, it signals to grantees that they can show up more fully.
- Solicit and act on feedback:** Philanthropy doesn't have all the answers. Grantees and communities provide valuable perspectives that can inform a funder's strategy and approach, inherently making our work more successful in the long run.
- Offer support beyond the check:** Responsive, adaptive, non-monetary support bolsters leadership, capacity, and organizational health. This is especially critical for organizations that have historically gone without the same access to networks or level of support than their more established peers.

# Strengthening Funded Partner-Funder Relationships Through Honest Conversations ~ 2021

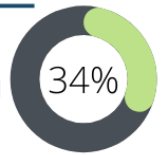
\* Virtual Convening ~ "Coffee Conversations" (March - May) \*

## Funded Partners



When? May and June 2021  
What? 8 virtual "Coffee Conversations"  
Who? 55 of 244 invited or 23% attended

## Funders



When? March 2021  
What? 4 virtual "Coffee Conversations"  
Who? 20 of 59 invited or 34% attended

## What We Heard: The Most Helpful Changes Funders Implemented

\*Indicates this item directly correlates to a top recommendation from the 2019 Workshop

### 1. Ongoing, Reciprocal Communication

- More **frequent, informal, and meaningful** conversations\*
- More proactive outreach and communication offered
- Increased accessibility to virtual dialogue
- Connections to additional resources provided
- Timely funding decisions, feedback, and updates given
- Challenges were addressed with **grace, understanding and flexibility\***

*"It felt more like how funders say they have always wanted it to be, conversational, rather than more formal as it was in the past."*

### 3. Stronger Relationships & Knowledge Sharing

- Increased flexibility, trust, and "going beyond referrals" solidified relationships
- Providing a soft hand-off when funder staff changed, helped maintain the relationship
- **Connections** provided to other partners/funder network were very helpful\*
- Greater access to **learning** through virtual workshops and recordings appreciated\*
- Timely information about additional funding opportunities and other resources through newsletters and email\*
- Increased efforts to work together as region (**more collaboration** and collective responsibility)\*
- Overall funded partners felt trusted as experts to deliver services to clients – affirming of work and relationship

*"More of a sense of a companion – coming alongside to help vs. the formal/ transactional relationship"*

*"Communication, communication, communication...This is the first year in which I was able to meet virtually with every funder. That was exceptionally helpful in deepening the relationship."*

### 2. Improving Grantmaking Experience & Need Alignment

- Digital processes were a welcome change for most
- Amendments to open grant contracts were simple to execute
- Conversion to general operating support has been "validating and incredibly helpful"
- Increased awareness of the necessity for operating support and reserves for funded partners is greatly appreciated
- **Automatically renewed/extended** contracts (in many cases)\*
- Flexibility showed trust and concern for community needs
- **Streamlined grant processes allowed focus to remain on mission work\***
- Reduced frequency of reporting, simplified forms, and reporting via phone or zoom vs. written report
- Repetitive questions and character limits removed from applications
- Fee for service models updated to improve access and responsiveness
- Evaluation requirements more realistic and manageable

*"There has not been a request that we have made that has not in some way been fulfilled, when previously there were a lot of reasons why things could not be done."*

### 4. Promoting Racial Equity & Addressing Racial Inequities

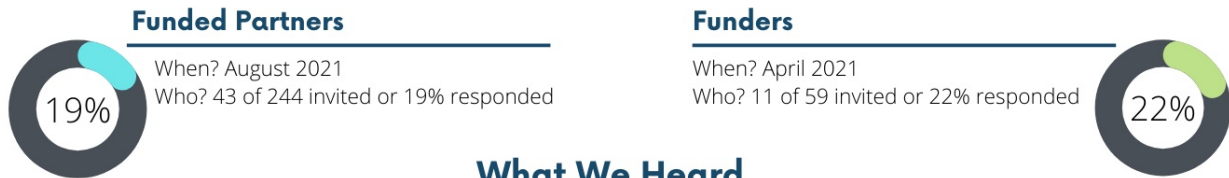
- Increased awareness and understanding of health disparities and inequities and greater intention of moving toward racial equity as funders apparent
- **Increased access** and connection to new partners, beyond historical cohorts of funded partners (more inclusive and equitable)
- Funds targeted to address most immediate needs, including front-line workers who are 'traditionally sidelined'
- Added application questions to challenge everyone to consider a racial equity strategy
- New funding available for equity focused training opportunities for funded partner staff and volunteers
- Recognition that more work still needs to be done (ex. creating more **common language** among funders and funded partners using more inclusive categories in terms of race, gender, or other types of diversity but also recognizing it is not always reasonable to collect)\*
- BIPOC-serving organizations who participated reported they felt their needs were better supported

*"Opportunity to do different things – new funder mentality, thought and support"*

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## \* Survey Results (April and August) \*

As the virtual convening "coffee conversations" were limited in size to allow for robust conversations, a short follow up survey was sent to both Funded Partners and Funders to seek to additional feedback within the themes of communication, grantmaking, relationships and racial equity. Unfortunately, the number of responses received were limited, making it difficult to draw any valid conclusions. In addition, Funded Partners were asked to respond to questions with all Funders in mind, while the Funders who chose to participate in the survey were those most likely to be engaging in change. Thus, although discrepancies exist, it is likely the true differences are not as significant as those listed below.

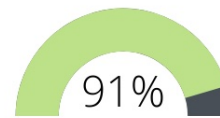
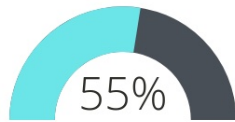


## What We Heard

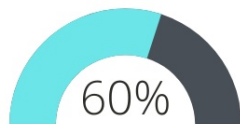
According to FUNDED PARTNERS the approx. % of funders who made changes in the last year that....

According to FUNDERS the % who reported they made changes in the last year that they feel....

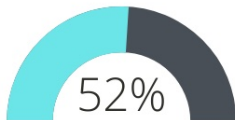
1. Improved communication



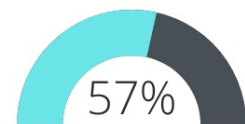
2. Ensured a positive and successful grantmaking experience



3. Gathered information regarding Funded Partner knowledge gained, lessons learned, and/or best practices and shared it with others



4. Integrated strategies to ensure a racial equity lens was used to inform the grantmaking experience, communication strategy and/or relationship building process



*Thank you!*

The FLEG Grantee Voice Committee would like to thank everyone who participated in one of our virtual "Coffee Conversations" and/or surveys. The rich conversations and thoughtful feedback illuminated many important insights. We look forward to continuing this work in 2022 as we begin to explore how to support a trust-based philanthropy approach within our region.