Exiting Responsibly: Best Donor Practices in Ending Field Support



A Study for the Robert Wood Johnson Foundation Janice Petrovich, Ed.D.



Robert Wood Johnson Foundation

August 16, 2012



Welcome



Keith Greene Director, Membership Council on Foundations



Agenda

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

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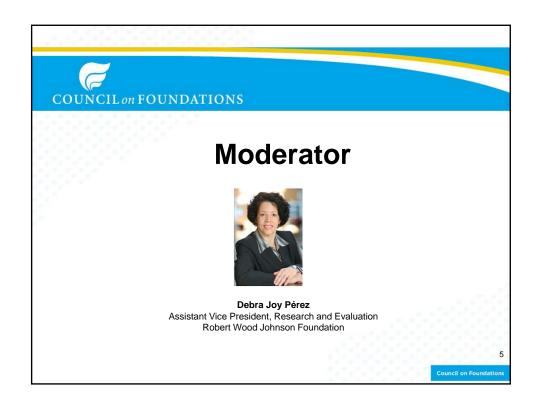


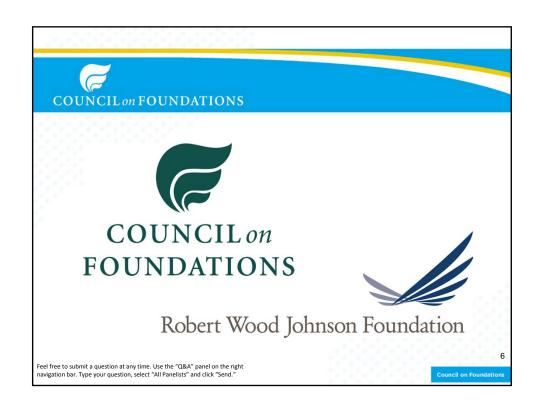
WebEx Tips

- 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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- 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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Webinar: 40 Years of Research and Evaluation at RWJF

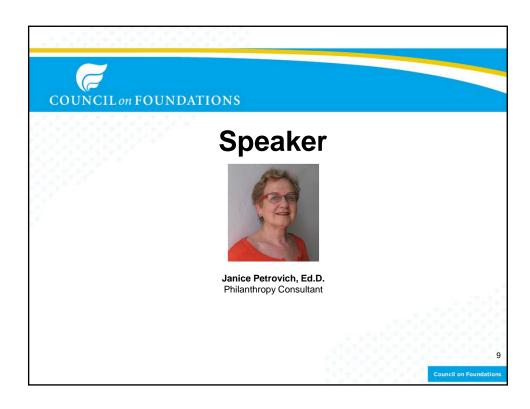
ROBERT WOOD JOHNSON FOUNDATION
40 YEARS OF IMPROVING HEALTH
AND HEALTH CARE

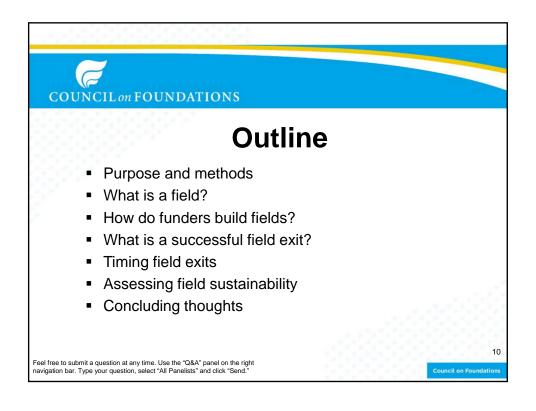
September 19, 2:00-3:30pm EST
Current and former leaders of research and evaluation
Register soon at: www.RWJF.org/pr

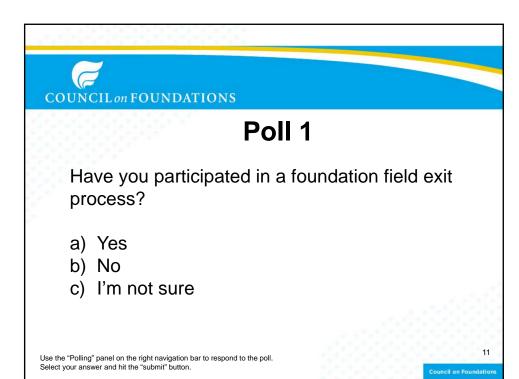
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Learn more at www.rwjf.org/40years

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Source

- Literature review
 - RWJF Retrospective series
 - Field building, foundation exits
- Interviews (31)
 - Diverse nonprofits and funders

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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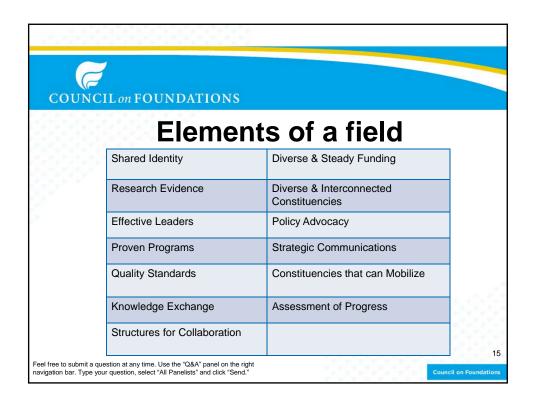
What is a field?

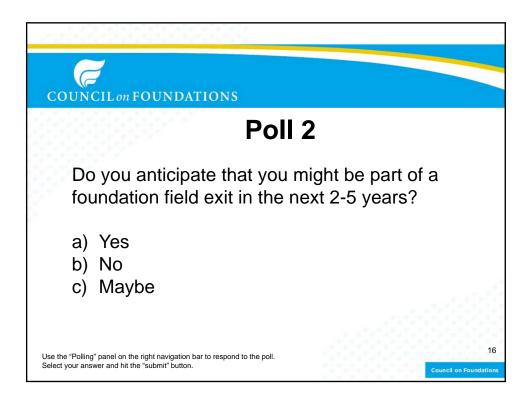
- Knowledge
- Policy
- Practice
- Requires:
 - Information (facts, models, messages)
 - · Diverse actors
 - Collaboration

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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."

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Successful Exits

- Respectful process
- Promote sustainability

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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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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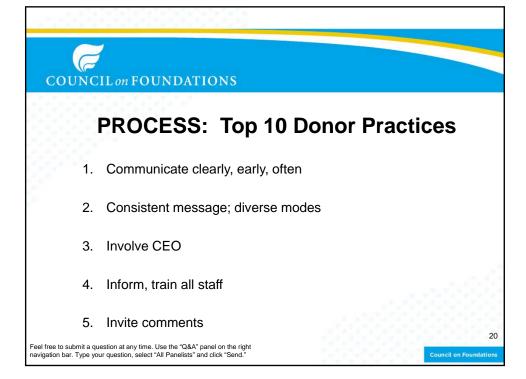


Indicators of Success (cont.)

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

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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PROCESS: Top 10 Donor Practices

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

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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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

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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LIKELIHOOD OF FIELD SUSTAINABILITY		
LOWER		<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





Concluding Thoughts

Promoting sustainability: Trends to resist

Avoiding risk

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

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 Information



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Organizational Effectiveness for Foundations – A Webinar Series

- Visit the webinar archive at <u>www.cof.org/education</u> to play back other recordings from this series
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 - Improving Internal Practices in Philanthropy February 21, 2012
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