Innovation & Impact of Lean, Mean, Producing Machine PSOs

- Paul D. Daugherty, President & CEO, Philanthropy West Virginia, @Pddy
ARIZONA GRANTMAKERS FORUM | WHO WE ARE

Arizona Grantmakers Forum is the statewide network that connects, educates and advocates for Arizona philanthropy.

MISSION
We empower our members to transform Arizona through leadership and meaningful philanthropy.

VISION
We envision a vibrant Arizona where all people thrive.
VALUES

Integrity | Collaboration | Community Stewardship
Diversity & Inclusion | Transformation

TO STATE THE OBVIOUS: Living our values—especially TRANSFORMATION— requires resources.

We need to test our assumptions, proactively improve our approaches and build on our success to make long-term positive change.
Three-year $1.15 million grant, beginning in 2019

Build AGF’s capacity to serve as powerful voice for Arizona philanthropy

Host two funder collaboratives, including an Arizona social equity collaborative
TRANSFORMATION | LIVING THE VALUE

SATTERBERG GRANT: AGF’S VOICE

- Engage communications firm to:
  - Refresh brand
  - Raise AGF’s profile
  - Enhance marketing and communications
  - Work with United Philanthropy Forum to modernize website
- Invest in research reports and tools including Get On The Map
SO, SPEAKING OF LEAN, MEAN (AND PRODUCING, OF COURSE) PSOs...

<table>
<thead>
<tr>
<th>AGF FY 2018 (Pre-Satterberg Grant) Operating Budget</th>
<th>AGF FY 2019 (with Satterberg Grant) Operating Budget</th>
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</thead>
<tbody>
<tr>
<td>Total Expenses</td>
<td>$313,349</td>
</tr>
<tr>
<td>Net Operating Income</td>
<td>-$16,614</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>$697,312</td>
</tr>
<tr>
<td>Net Operating Income</td>
<td>$0</td>
</tr>
</tbody>
</table>
TRANSFORMATION | LIVING THE VALUE

SUSTAINABILITY BEYOND SATTERBERG GRANT

- Board added new goal to 2019 – 2021 Strategic Framework
- UNDER CONSTRUCTION: Capacity-building plan to fulfill our mission

“RUBBER, MEET ROAD.”

- First Look – June 2019
- Next Draft – September 2019
- FY 2020 Budget – November 2019
WE ARE THE ALLIANCE!
History and Context

• **MS Association of Grantmakers:**
  – Representing about 75% of the philanthropic funds in Mississippi
  – From “chat and chew” to carefully constructed service to our members
  – May 2012 Presentation to Board
    • Challenge: Lack of clarity re: relationship to non-profit sector

• **MS Center for Nonprofits:**
  – More than 25 years serving the nonprofits of the state
  – 2012 board discussion
    • Challenge: Organizational sustainability
    • Challenge: Statewide program delivery to increase capacity building support to nonprofits

**Opportunity:**
Creating a more formalized working relationship between MAG and the MS Center for Nonprofits
“Two Sides of the Same Coin”
Philosophy

• **MAG focus:** Working with philanthropy about how to effectively and appropriately:
  • Identify nonprofit organizations for potential investments
  • Conduct due diligence
  • Make wise investment decisions
  • Manage the grantmaking process
  • Ensure accountability related to the investments

• **Center focus:** Working with nonprofit organizations to:
  – Increase knowledge and competence about nonprofit governance, management and operations, including:
    • Leadership
    • Organizational and staff development,
    • Capacity building, including how to interact most effectively with potential funders and how to approach philanthropy as part of a fundraising strategy.
Mission, Vision and Values

- **Our Vision**: We have effective and efficient nonprofit and philanthropic organizations throughout the state that are working together to improve the lives of the people and communities of Mississippi.

- **Our Mission**: Our mission is to serve, build capacity, and foster collaboration in Mississippi’s nonprofit and philanthropic communities.

- **Our Values**: Diversity and Inclusion, Transparency, Innovation, Collaboration, Use of Best Practices, and a Focus on Quality.
Plans and Hopes for the Future

The Alliance

Annual nonprofit assessment and custom research, data analysis & reporting

Online repository of nonprofit, foundation and donor profiles

Partnership with Secretary of State’s Office to strengthen the sector

Nonprofit and funder training and technical assistance

Nonprofit/funder membership and affinity group development & meeting facilitation

Curation of community and statewide conversation on social issues (e.g., Ted Talk)

Idea development / Innovation space / Virtual Incubation

Nonprofits sharing their ideas/approaches with donors and funders
Share Your Feedback

- Please take a couple of minutes and share what you thought of today’s session. We want to hear from you!
- Session surveys are available in the conference app.
- Navigate to the session and click on “Session Survey” underneath the session description & speakers.
Thank You

- What’s Next?
  - 12:30 - 12:45 pm, Transition
  - 12:45 - 2:15 pm, Conference Closing Luncheon- Revolution, Evolution, Devolution: Moving the Energy to Action, Orchid Ballroom (6th Floor)