Better Together

FORUM OF REGIONAL ASSOCIATIONS OF GRANTMAKERS

FOUNDATION CENTER

July 2014 | San Diego, California
ANNUAL CONFERENCE
THE YEAR WAS...

1984
“Where’s the Data??”

- COUNCIL ON FOUNDATIONS
- FOUNDATION CENTER
- IRS
- REGIONAL ASSOCIATION(S)
- AFFINITY GROUP(S)
- FOUNDATION
- G.M.S.
- OTHERS
  - GEO, GMN, etc.
  - CEP, FSG, etc.
  - Academics
  - NCCS, GuideStar
  - Etc.

*RED = RAW DATA
GREEN = PROCESSED DATA/REPORTS
BLUE = COOPERATIVE DATA PROJECTS*
COUNCIL ON FOUNDATIONS
- Staff & Board Composition
  - Some foundations
- Salaries & Benefits
- Mgt Practices
- Investments

FOUNDATION CENTER
- Foundation Profiles
  - All foundations
- Processed Grants Data
  - Selected Foundations
- Recipient Org Data
- “Learnings”

REGIONAL ASSOCIATIONS
- Member Data
- Idiosyncratically-processed Grants Data
  - Regional Foundations
- “Learnings”

INTERNAL REVENUE SERVICE
- Raw Financial Data
- Raw Grants Data
- 990’s & 990-PF’s
In Today’s Operating Environment...

*Foundations should expect to have constant access to high-quality data in order to do their work effectively (period)*
Expectations Regarding the Use of Data are Changing Rapidly

- Technological Advances
- Changing Professional Norms
- Generational Shifts
- Pressure to Demonstrate Impact
It’s time to implement a 21st century data system for philanthropy
In an Ideal World...

1. Data *SHOULD* be *timely*

2. Data *SHOULD* be *accurate and complete*

3. Data *SHOULD* be available to and through “communities of practice”

4. Data *SHOULD* be collected in *standardized* ways

5. Each community of practice *SHOULDN’T* have to build its own *data management system* or its own *data access & visualization tools*
We Can Make This Happen

Reminders/Technical Assistance

FOUNDSATION
G.M.S.

Terms of Agreement/Financial Transactions

Custom Projects

REPORTS/MAPS/ETC.

T.A.

Technical Assistance

Terms of Agreement/Financial Transactions
Why This Makes Sense for Regional Associations

• **Next-level member services**
  – Data-driven conversations
  – Data access & visualization tools
  – Benchmarking services for members

• **Responsiveness** to emerging professional expectations regarding the use of data

• Regionals need to be THE experts on the work of their members in order to successfully **Advocate** on their behalf

• **Cost-sharing**, by spreading implementation and maintenance costs across all regionals
We’re Already Partners
WHAT’S NEXT?
FORUM/Foundation Center Working Group

• **FORUM**
  – David Biemesderfer (FL)
  – Barbara Edmond (ME)
  – Mike Litz (FORUM)
  – Marissa Manlove (IN)
  – Maggie Osborn (CT)
  – Laura Sauser (IA)
  – Joyce White (OR)

• **Foundation Center**
  – Jeffrey Falkenstein (DATA)
  – Larry McGill (RESEARCH)
  – Lisa Philp (STRATEGIC PHIL)
  – Amanda Dillon (STRAT PHIL)
  – Nina Gantcheva (STRAT PHIL)

• Conference Calls
• Tech Tools Webinar
• Roundup of Regional Reports (w/FC)
• Agreement of Cooperation
• Project Areas
  – Philanthropy Data
  – Philanthropy Research
  – Philanthropy Tools
Philanthropy Data

Philanthropy Research

Philanthropy Tools
Philanthropy Tools: DEMOGRAPHICS
Philanthropy Tools: PATHWAYS
We’ll Be Around – Come See Us for a Demo