

# How Can Grantmakers Facilitate Connections and Collaboration?

**The urgency and complexity of the problems nonprofits and grantmakers are trying to solve demands that we come together to exchange knowledge and insights from our work and combine resources. Convenings are powerful vehicles for amassing shared knowledge, building trusting relationships and laying the groundwork for collective action. And, grantmakers are well positioned to provide the types of support to catalyze, develop and sustain these efforts. Many funders use the power of convening to benefit our grantees and communities in countless ways. But, even grantmakers who think they are convening well can usually improve some element of convening design, execution or its desired outcomes. This piece offers practical advice to help grantmakers get better at bringing stakeholders together.**

Grantmakers use the power of convening to benefit grantees and communities in countless ways — and are uniquely positioned to bring people together for a variety of aims that add value to communities beyond funding. Many funders have experience as conveners, but experience does not always translate into effectiveness. Conveners can, unintentionally, harm relationships with grantees and communities. For example, nonprofits sometimes complain that they went to a meeting only because their funder asked them to, and they came away feeling it was a waste of their time. Worse, they sometimes say the meeting was frustrating because it created false expectations or didn't address the real issues. When grantmakers convene, we need to be better collaborators and use our power and influence for the common good.

It takes a particular set of skills, values and resources to be successful at bringing together different parties for a common goal. It also takes patience and a dose of humility. Although some of the same rules apply to meetings in general, convenings involve unique challenges.

For more information on this topic see [\*Great Power, Great Responsibility: A GEO Briefing on Grantmakers' Role as Conveners\*](#), (Washington, D.C.: Grantmakers for Effective Organizations, 2013).

## Convening Rewards and Risks

Convenings enable funders to hear the voices and perspectives of those closest to the problems we are working to address. Such insights can shift a grantmaker's entire funding strategy. Among 755 grantmaking organizations that responded to GEO's 2011 survey of philanthropic practice, those that listened to and learned along with grantees and other stakeholders were more likely to offer the kind of support — such as multiyear, general operating and capacity-building grants — that enables nonprofits to address deep-rooted problems in our communities. Other benefits of convenings include:

- Learning and sharing best practices,
- Encouraging networking and relationship building among organizations working on pieces of the same issue,
- Helping grantmakers get a deeper understanding of a community need;
- Creating opportunities for potential collaboration,
- Educating public officials, stakeholders or the broader community about an issue,
- Developing a collective strategy for addressing an issue,
- Identifying new leadership,
- Exposing other potential funders to nonprofits that are addressing an issue, and
- Catalyzing a network for collective action.

### Types of learning and convening structures include:

- Learning Communities (aka Communities of Practice, Learning Networks) — a group of practitioners who, while sharing a common concern or question, seek to deepen their understanding of a given topic by learning together, on an ongoing basis, as they pursue and apply new knowledge to their individual work
- Trainings — imparting knowledge or building skills, mostly through an expert-led discussion.
- Fellowships — in-depth professional development over time.
- Retreats — coming together for a time-bounded activity, often off-site, to launch a collective effort or reflect on past action.
- Summits/Conferences — intensive sharing and knowledge exchange in a short period of time with a large group.

## How to convene well

### (1) Start off strong

The more preparation grantmakers do up front, the more successful our convenings will be. The pre-work checklist should include a deliberate process to identify key stakeholders and their interests, build relationships with key groups, and formulate goals, agendas and content in a clear and collaborative way. Paying attention to a few key things at the start of any convening effort can help produce better results and ensure the best use of resources.

*Make sure the goals and purpose for convening are clear.* The grantmaker's mission — serving grantees and the community — should be at the heart of the goal for any convening. The most effective convenings take into consideration not only the foundation's interests but the participants' needs as well. One-time gatherings can work, depending on the goal. For example, a funder might want quick input from key stakeholders. Funders should be clear about expectations so that participants know if they are being invited to one event or making a longer-term commitment. Evaluation should be built into every convening, regardless of whether it's a single meeting or multiple meetings over a long period of time.

*Figure out what part you will play.* Making the decision about whether to convene is itself an exercise of a grantmaker's leadership. In deciding whether to convene, foundations should ask questions like these:

- Are we in the best position to do this?
- How does a convening fit our current priorities?
- Have we done it recently, and should we let someone else take the lead?
- Could we get more traction if we used our resources differently?
- Is our reputation needed to make the convening successful?

An equally important decision to focus on is the grantmaker's role during the event. Grantmakers can play a number of roles, from being a facilitator to simply providing the space, to sitting at the table as a participant. Many grantmakers are taking the time to think through the power dynamics and implications of being more or less involved during convening events.

Sometimes a grantmaker prefers a more behind-the-scenes role. Perhaps another organization, for example a grantee or an academic institution, might be better positioned to drive the agenda or facilitate, with foundation funding and staff support. Depending on the partner, co-convening can signal that there is community ownership over the outcomes.

Foundations also should be open to how our roles might evolve over time. It's also wise for funders to think about the end at the beginning because when the event is over, a grantmaker's work isn't done. Prompt follow-through will be needed, particularly on any action items from the convening. Because one convening often leads to another, it's best if a grantmaker has already visualized the end point and planned in advance for exiting gracefully.

*Think of progress incrementally.* For every convening, grantmakers should be clear on next steps for everyone and remain flexible. Incremental goals can help funders keep our convenings manageable. So does allowing for shifts in goals and expectations, as well as unintended outcomes.

*Be sensitive to the big picture of context and timing.* Consider when a convening can be of most help to grantees and communities. Grantmakers are often in the best position, with a bird's-eye view of communities, to recognize when conditions have changed and warrant a conversation. For example, after the economic downturn, many foundations convened grantees to discuss possible strategies for weathering the tough economy.

## **(2) Bring the right people to the table**

An essential component of convening is determining whom to invite, what potential participants' interests are, and how to meaningfully engage them. Be thoughtful about making "the ask." Be clear about why and how participants can contribute: Are they being tapped for their expertise? Are they expected to develop a plan? Will they be asked to make decisions or just to provide feedback?

Also, grantmakers should be respectful of the needs of the people being invited. Any convening design should consider how to make it easy for people to participate, such as setting clear objectives, producing good preparation materials and minimizing the time involved in meetings.

*Go beyond the usual suspects.* It's easy to draw up an invitation list to bring a specific group of well-known grantees together. Some grantmakers are tempted to invite people we already know or those who share one point of view. Successful conveners know that the most effective convenings are those that surface a broad spectrum of views. To understand the interests of key community stakeholders, grantmakers can consider questions such as:

- What does this person or organization bring to the process in terms of resources and expertise?
- What is their interest in this work, that is, what would motivate them to participate?

- To what extent is their support and engagement essential to the ultimate success of the work?
- To what extent will their work, their lives and their neighborhood be affected by the decision?

*Ensure diversity.* Grantmakers use many strategies to bring diverse voices to their convenings, such as intentionally inviting groups with different constituencies or policy positions. A GEO member cautioned that convening a wide range of community voices requires “being conscious of your power and privilege as a funder.”

### (3) Implement smartly

Even experienced conveners should continuously ask participants, and ourselves, how we can work better. Sometimes convenings aren’t effective because grantmakers fail to consider a few important keys to implementation. Throughout the convening process, grantmakers should be up-front and transparent about our interests — both internally and to the community members we are convening. Failing to do so can harm relationships. Grantmakers sometimes have our own agendas for a convening. It’s okay for us not to be neutral; we just shouldn’t try to pretend we are.

*Use skilled facilitators.* Trained facilitators not only have the skills to make a conversation productive by ensuring participation and balancing diverse interests, but they can also add neutrality to the convening. If the grantmaker is also the facilitator, there might be a tendency for participants to feel there is a power imbalance. Participants may be less open as a result. An exception to this rule might be in order when the convening is simply for networking purposes and not for decision making. With a complex convening involving many stakeholders, however, professional facilitation is a must.

*Give convenings the resources they need.* With simple convenings, grantmakers can gather people in their conference room with little cost. However, complex convenings may take more staff time and financial resources than anticipated. Grantmakers should budget for resources required in the follow-up stage, too.

## Conclusion

Grantmakers who serve as conveners can bring considerable value to our communities. But conveners should always be mindful that there is an art to doing it well. GEO encourages grantmakers to examine the convening we’ve already done and consider opportunities to better exercise our role in the future in how we plan for and implement convenings.