

impact in action

A STUDY BY THE TAPROOT FOUNDATION ON THE WORK OF THE
WASHINGTON REGIONAL ASSOCIATION OF GRANTMAKERS

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acknowledgements

This report was prepared under a grant from the Taproot Foundation to the Washington Regional Association of Grantmakers (WRAG). Impact findings presented in this report are not a complete list of all the impacts of the organization but are shown for illustrative purposes. The findings of this report are a result of close collaboration between the Taproot Foundation team and WRAG staff and represent original research and observations collected by the Taproot team, as well as data provided by the WRAG staff.

The team would like to express gratitude to the WRAG staff and members for their collaboration and generosity of time and spirit. Their contributions via interviews, observations, and data were instrumental in this study and much appreciated.

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Healthy Communities Working Group
Corporate Philanthropy Affinity Group

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introduction

Overview

WRAG's membership represents a vibrant cross-section of philanthropy, including foundations, corporate and governmental grantmakers, individual philanthropists, and colleague organizations.

Through a grant from the Taproot Foundation, the Washington Regional Association of Grantmakers (WRAG) undertook a comprehensive effort to:

- Learn what WRAG's impact is, and if and how the organization helps its membership be more effective and responsible in their philanthropy.
- Determine how to most effectively measure impact and performance against WRAG's strategic objectives and mission.

WRAG's mission is to promote increased, effective, and responsible philanthropy with the goal of making the Greater Washington region a better place to live and work. The Taproot Foundation's assessment found that WRAG is a force for philanthropy in the region. Across each of its focus areas, WRAG demonstrates its value as a convener, source of knowledge and information, voice of philanthropy, and promoter of collaboration and relationships.

This report is intended to accomplish two purposes:

- 1) To report on Taproot's findings on WRAG's impact; and
- 2) To advise WRAG on ways to effectively gather impact data in the future.

Taproot Methodology

Taproot performed a comprehensive assessment of WRAG's impact, as well as WRAG's current impact evaluation tools and processes.

- Interview and focus group participants were selected to gain the perspective of different types of member funders and others in the philanthropic community.
- Impact measurement and reporting methodologies of other organizations providing resources for grantmakers were researched.
- Program measurement methodologies were assessed for their potential usefulness to WRAG.



Demographics of WRAG's Membership

Annual Member Giving	\$228 million (approx.)*
Member Organizations	108
Individuals Represented	968

*Source: WRAG's *Our Region, Our Giving 2014*

ASSESS WRAG IMPACT	ASSESS WRAG EVALUATION TOOLS
<p>Member Focus Groups & Interviews</p> <p>26%</p> <p>of membership represented</p> <p>WRAG Board of Directors Healthy Communities Working Group Corporate Philanthropy Affinity Group One-on-One Member Interviews</p>	<p>Current Evaluation Approach</p> 
<p>Non-Member & Colleague Organization Interviews</p> <p>7</p>	<p>Outside Research Sources</p> <p>Taproot Foundation Root Cause The World Bank W.K. Kellogg Foundation Grantmakers for Effective Organizations</p>

value and impact findings

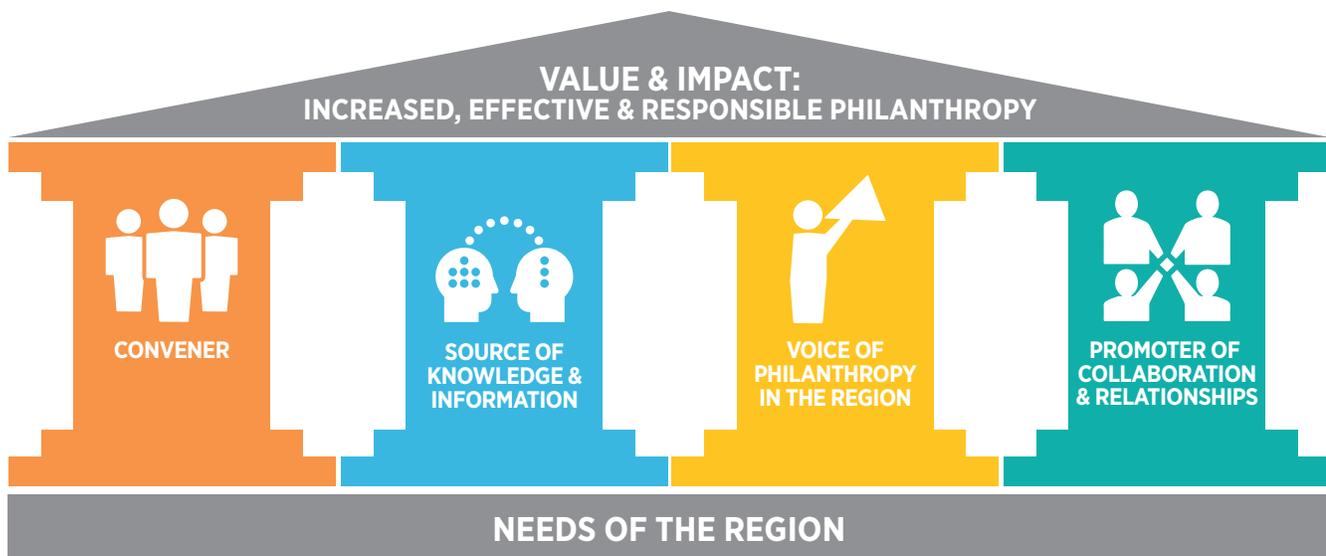
Value Drives Increased, Effective, and Responsible Philanthropy

WRAG is acknowledged as playing a key leadership role in regional philanthropy. Members were clear and consistent in their descriptions of the value they receive from WRAG. It is revealing that members' perception of value aligns with each of the components of WRAG's mission of driving increased, effective, and responsible philanthropy in the region.

IMPACT	VALUE
 Increased	Increased grantmaking capacity leads to more support directed to specific nonprofits, issue areas, and municipalities. More dollars is always the number one need cited by area nonprofits.
 Effective	<p>Strong member relations facilitate informed and focused grantmaking.</p> <p>Professional development and sharing of ideas lead to adoption of best practices.</p> <p>Role and reputation of WRAG facilitate access to policymakers, private sector, thought leaders, funders, and nonprofits.</p>
 Responsible	Improved knowledge of issue areas and time-sensitive topics results in philanthropy that better meets regional needs.

Pillars of Impact

The value WRAG provides to members and the philanthropic community is derived from its work across four pillars of impact. WRAG serves as a convener, source of knowledge and information, voice of philanthropy in the region, and promoter of collaboration and relationships. Through each of these roles, WRAG adds value to its membership by providing access to community stakeholders, knowledge, and forums for collaboration.



The meaning and importance of these pillars is evident in the outcomes members shared with Taproot. A sampling of those outcomes is provided below, while the case studies presented later in this report further demonstrate WRAG's impact in driving change. Members use the resources, relationships, and knowledge gained from WRAG to take specific action in funding. Members also benefit from the ability to leverage their staff and financial resources, thereby increasing their capacity and efficiency.

PILLAR OF IMPACT	WHAT IT MEANS	WHY IT MATTERS: MEMBER EXAMPLES
 <p>CONVENER</p>	<p>A forum for an open, evidence-supported and thought-provoking conversation and decision-making within the philanthropic community and with key stakeholders in government, nonprofits, and the larger community.</p>	<p>THE BOEING COMPANY changed their local approach to supporting military veterans - focusing on more effective coordination of services that support veterans - after attending the WRAG-sponsored presentation of the Community Foundation for Northern Virginia study on veterans' needs.</p>
 <p>SOURCE OF KNOWLEDGE & INFORMATION</p>	<p>Ensures exchange of knowledge, flow of information, and analysis of the key local and regional challenges for partners to learn from each other and to design effective solutions.</p>	<p>INTER-AMERICAN DEVELOPMENT BANK & TRUTH INITIATIVE (formerly known as Legacy) were able to identify strong nonprofit candidates for their local giving programs more efficiently and effectively with information provided by other funders.</p>
 <p>VOICE OF PHILANTHROPY IN THE REGION</p>	<p>Unites the philanthropic community in the region, represents its important work, and signals its priorities to key stakeholders in the region.</p>	<p>LOUDOUN COUNTY COLLABORATION, facilitated by WRAG, provides a venue to address the specific needs of the county and opportunities for philanthropic investment. The anticipated impact is new resources for local nonprofits.</p>
 <p>PROMOTER OF RELATIONSHIPS & COLLABORATION</p>	<p>A platform for partners to develop relationships, build consensus around key local and regional challenges, and align and mobilize resources for action.</p>	<p>With WRAG as a catalyst, ENTERPRISE COMMUNITY LOAN FUND will bring additional capital for affordable housing into the region. This collaboration among members and other stakeholders will help address this pressing community need.</p>

Challenges to Assessing WRAG's Impact

During the course of Taproot's evaluation, the challenges of assessing WRAG's impact became clear:

- **Timeframe.** Impact is often evolutionary rather than direct and immediate.
- **Multiple contributing factors.** Impact is often the result of the collective efforts of WRAG, its members, and members' grantees over time, making attribution to a single entity difficult.
- **Varying member definitions of effective philanthropy.** "Promoting effective philanthropy" is a cornerstone of WRAG's mission. However, this is challenging to evaluate when stakeholders each have different needs and priorities against which effectiveness is measured.

Despite these challenges, WRAG's impact in each of its focus areas is evident when evaluating its work across the four pillars of impact.

delivering impact

Program Activities in 2015

The activities WRAG performs ultimately lead to meaningful outcomes. In 2015, WRAG was active in facilitating relationships and supporting the work of its members.



Impact Case Studies

Housing, the Loudoun County Collaboration, and the Institute for Corporate Social Responsibility were highlighted by members in interviews with Taproot. These activities led to meaningful achievements across initiatives spanning different focus areas, geographies, and member groups. For that reason, they are presented here as illustrative case studies of WRAG's impact.

Housing

WRAG's work across the pillars of impact continues to help address housing needs. A forthcoming initiative aims to attract at least \$5 million in new resources for affordable housing in the region, while WRAG's cross-sector work is influencing and informing community stakeholders, as evidenced by a sampling of the array of WRAG publications and convenings. (see *Case Study: Housing, page 6*)

Loudoun County Collaboration

In 2015, WRAG hosted the first-ever Loudoun County Philanthropy Conference to introduce the region's philanthropic community to the specific needs and opportunities in Loudoun, provide a venue for collectively exploring strategies for addressing those needs, and, ultimately, to encourage increased and more effective philanthropic investments in the county. (see *Case Study: Loudoun County Collaboration, page 7*)

Institute for Corporate Social Responsibility

WRAG created the Institute for CSR in response to the need voiced by members for more readily accessible CSR training programs. The Institute provides CSR practitioners with opportunities to expand their skills and networks, stay inspired, and learn practical, applicable best practices to deliver maximum value to their companies and the communities they serve. (see *Case Study: Institute for Corporate Social Responsibility, page 8*)

CASE STUDY: HOUSING

WRAG's Affordable Housing Action Team

Created by WRAG in 2012 in response to identified need for a coordinated regional effort to address growing shortage of affordable housing.

REGIONAL CHALLENGES

Regional shortage of 250,000 units of affordable housing. By 2023, nearly 150,000 additional units will be needed to accommodate population growth.*

(*Enterprise Community Partners' 2015 report, *Call the Question: Will the Greater Washington Region Collaborate and Invest to Solve Its Affordable Housing Shortage?*)

REGIONAL RESOURCES

Of the \$228 million in giving by WRAG members in 2013, \$9 million went to housing, down from \$29 million in 2012.* Impact investing initiative aims to provide new resources toward housing.

(*WRAG's *Our Region, Our Giving* 2013 and 2014 reports)



CONVENER

Sponsored former HUD Secretary Henry Cisneros's "Brightest Minds" presentation on the importance of affordable housing.

Co-founded the Greater Washington Housing Leaders Group (GWHLG), a consortium of public and private sector leaders promoting strategies to increase affordable housing.

Partnered with the Aspen Institute for a panel called "Using Impact Investing to Support Affordable Housing."



VOICE OF PHILANTHROPY IN THE REGION

Testimony to Mayor Bowser's transition team emphasized need for regional approach to housing challenges.

Became a part of the Regional Economic Roadmap work, thereby introducing philanthropy's perspective to the business community.

Invited to be part of a special Federal City Council program on affordable housing to provide information on the local philanthropic sector's work on the issue, and how business could be involved.



KNOWLEDGE & INFORMATION SOURCE

Three editions of the *What Funders Need to Know* series brought attention to the relationships between housing and transportation, education, and health.

Over 100 articles included in the *Daily WRAG* news roundups over the past three years provided timely information on housing-related issues in the region.



PROMOTER OF COLLABORATION

Impact investing initiative being launched in partnership with Enterprise Community Loan Fund aims to leverage \$5 million of new capital for affordable housing.

GWHLG session at the Housing Association of Nonprofit Developers' 2015 conference outlined regional strategies to increase affordable housing, accompanying the release of the group's *Call the Question* report.

CASE STUDY: LOUDOUN COUNTY COLLABORATION

Place-Based Collaboration

2008: Prince George's County

ACTION 2008

WRAG convened 28 donors along with the Community Foundation for Prince George's County to create the Partnership for Prince George's County.

IMPACT 2008-2015

Partnership provided capacity building and leadership training to 500 local nonprofits and over \$725,000 in capacity building grants.

2015: Loudoun County

MISSION

Provide a venue for the Greater Washington region's philanthropic, nonprofit, and government leaders to address the specific needs in Loudoun County and explore opportunities for philanthropic investment to help improve quality of life in the county.

2015

- MAY** ● WRAG hosts the first-ever Loudoun County Philanthropy Conference with more than 100 cross-sector attendees. 71% of participants express interest in follow-up conversations.
- JULY** ● Panel of leaders share with 60+ attendees their lessons learned from strengthening the nonprofit sectors in Montgomery and Prince George's counties.
- SEPT** ● \$25,000 investment secured from the Claude Moore Charitable Foundation. WRAG continues to serve in a fundraising and fiscal sponsorship capacity, and to partner with others in leading the initiative's programmatic work.
- FALL** ● A steering committee of philanthropic, nonprofit, business, government, and faith leaders formed to advance equity and build opportunity for the residents of Loudoun County.

PARTNERS IN COLLABORATION



Community Foundation for Loudoun & Northern Fauquier Counties

Community Foundation for the National Capital Region

Community Foundation for Northern Virginia

Kaiser Permanente

Claude Moore Charitable Foundation

Washington Regional Association of Grantmakers

Wells Fargo

CASE STUDY: INSTITUTE FOR CSR

This four-part course of study examines the scope and complexity of CSR, including its evolution, components, best practices, measurement models, key issues, and current trends. Upon completion, participants receive a professional certificate in CSR from Johns Hopkins University.

“Rarely do we as CSR leaders get to engage in nuanced, thoughtful discussions on how to build a vision and execution strategy that will yield the greatest social and business impact.”

– Graham McLaughlin
The Advisory Board Company

Fundamentals of CSR Workshop launched in April. This workshop, the first Institute spin-off, is designed for non-CSR professionals interested in CSR.

Second year class of the Institute reaches 22 participants.

THE IMPACT

- Inspiration
- New skills
- Expanded networks
- Best practices

Members of WRAG’s **Corporate Philanthropy Affinity Group** express interest in additional opportunities for networking and learning. **Need is identified** for affordable, convenient, and local educational opportunities.

2011

THE CHALLENGE

Increasing pressure from consumers, shareholders, and society to be more socially responsible.

A committee of CSR professionals help develop a curriculum that is current, grounded in practice, and relevant to practitioners’ needs.

2013

2012

WRAG staff meet with potential academic partners and Board approves partnership with **Johns Hopkins University**.

2015

2014

Inaugural class of 20 engage with leading CSR practitioners and a diverse line-up of guest speakers and panelists. The Institute is featured in a **cover article in the Washington Business Journal**.

2016

Third year of the Institute kicks off in January, and the Fundamentals workshop will take place in the spring.

“[The Institute for CSR] provided a rare opportunity to dive deep into the challenges and opportunities that accompany a job in the CSR sector.”

– Kelly Waldron, United Way Worldwide
(formerly with Deloitte LLP)

evaluation recommendations

Understanding that members and potential members have different needs, objectives, and interests, and that WRAG has limited staff and financial resources, a commitment to impact measurement and alignment of resources to collective priorities is essential.

WRAG has sought for years to assess satisfaction, needs, and overall impact, be it through one-on-one meetings with members, satisfaction surveys after events, or member-wide surveys every 12 to 18 months. WRAG's commitment to progressing toward a culture of evaluation is further evidenced by its application for a grant from the Taproot Foundation.

Taproot recommends that WRAG – with the support of its membership – take a more systematic approach to measuring and reporting impact in order to more effectively guide programming and increase the collective impact of members in the region.

Culture of Evaluation

Consistent and thoughtful member participation in evaluation is instrumental in fostering a culture of evaluation within WRAG and the philanthropic community. This culture requires regular reflection, feedback, reporting, and action. It will not only enable WRAG to assess its impact against strategic objectives and make needed course corrections, but also empower its members to be more rigorous and strategic in their philanthropic efforts.

Fostering this culture of evaluation will require a commitment by WRAG staff and membership alike. WRAG members must collectively participate in this effort to benefit from and help institutionalize a culture of evaluation within WRAG and the larger philanthropic community in the region.



Impact Measurement Focus

While WRAG's membership ultimately aims to strengthen communities in the region, WRAG's impact measurement should focus on the stakeholders in the philanthropic community that its work directly affects. Those stakeholders are primarily grantmakers.

Data and Impact Collection Methods

Members must have sufficient opportunities to provide substantive feedback about the work WRAG is doing and communicate their needs and goals. A consistent mechanism for collecting feedback and setting priorities must be implemented to more effectively capture and report impact and then adjust programming activities accordingly.

Specifically, the Taproot Foundation team recommends that WRAG consistently collect feedback and measure progress toward target outcomes through the following means:

WHAT	WHO	WHEN	TIME FOR COMPLETION	WHY
Comprehensive Survey	Program staff and leadership	Every 3 years (aligned with strategic planning cycle)	30 - 60 min	Measure outcomes against strategic objectives Gauge member priorities and needs Inform strategic planning process
Annual Member Survey	Program staff and leadership	1x/year	15 - 30 min	Measure outcomes against strategic objectives Make course corrections, as needed
Mini Surveys	All event participants	0 - 2 months after significant events and initiatives	2 min	Measure outcomes against objectives of the event/initiative Gauge participants' satisfaction and perception of value
Evaluation Sessions	All members of working and affinity groups	1x/year	30 - 60 min	Measure outcomes against strategic objectives Prompt reflection on group's collective efforts
Case Study	Group of relevant stakeholders	1x/year	Variable	Understand and report on an issue, program, or experience in depth
Salesforce* Tracking	WRAG Staff	Ongoing	n/a	Document, measure and report on activities and outputs Collect and store relevant data for stronger member engagement

*WRAG's customer relationship management platform.

The goal of this multipronged approach to reporting is to ensure that WRAG is taking actions to satisfy identified member needs, address strategic priorities, and stimulate thought and reflection. These actions together will lead to more effective engagement with members and other stakeholders, increased learning, and improved leadership by the philanthropic community.

In the end, WRAG and its membership are a force in the region. Collective efforts to measure impact against strategic objectives and priorities will advance the mission of promoting increased, effective, and responsible philanthropy to make the Greater Washington region a better place to live and work. The Taproot Foundation sees WRAG doing this now and believes that the current trajectory will only secure heightened benefits for the WRAG membership and for the region.

wrag staff and board

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President & CEO
Northern Virginia Health Foundation

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SVP, Community Affairs Manager – MD, DC & VA
Wells Fargo

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