

Washington Regional Association of Grantmakers

# Strategic Framework

2017-2018





# From the President & Board Chair

November 2016

There's an old saying, "If it ain't broke, don't fix it." According to our conversations with members, and to interviews of members conducted by the Taproot Foundation, an external evaluator, the Washington Regional Association of Grantmakers (WRAG) is on the right path. The broad, current strategic framework – regionalism; the lasting value of our traditional work of convening, providing educational opportunities, serving as a voice of philanthropy, and promoting relationships and collaborations; along with the importance of building a solid financial foundation for the organization – was again endorsed as the backbone of what members want from WRAG. Therefore, the Board embarked on planning for the period 2017-2018 with this framework in mind, and in strategic discussions adjusted the framework only slightly now to read:

- Promote an **equitable region**;
- Strengthen our efforts to enhance our **lasting value**; and,
- Continue to build and diversify the organization's finances to ensure a **solid foundation**.

We will refine. We will sharpen. We will improve. We will not overhaul, re-envision, nor transform. Like you said, "It's not broken."

This document provides a snapshot of how WRAG will respond to member and community needs in 2017 and 2018. We will have a broad, overarching framework that guides the work and affords the organization needed flexibility to respond to our rapidly changing environment.

We look forward to working with our members to continue to improve the region.



Tamara Lucas Copeland

President



K. Lynn Tadlock

Chair, Board of Directors

## The Process

WRAG was fortunate to have been awarded a grant from the Taproot Foundation in 2015 to accomplish the following:

- To learn what WRAG's impact is, and if and how the organization helps its membership be more effective and responsible in their philanthropy (i.e., how WRAG is accomplishing its mission).
- To determine how to most effectively measure impact and performance against WRAG's strategic objectives and mission.

To carry out this assignment, the Taproot evaluation team interviewed a sizeable segment of the WRAG membership along with nonmembers and the leaders of colleague organizations. Their input, in conjunction with the sentiment of the WRAG Strategic Planning Committee and the full Board of Directors,<sup>1</sup> shaped the direction that is described in this document.

### Vision

We embrace a vision of an equitable region in which all can participate and prosper.

### Mission

The Washington Regional Association of Grantmakers promotes increased, effective, and responsible philanthropy to improve the health and vitality of the region and all who live here.

## Overarching Priorities

Four years ago, WRAG began focused work to promote and enable affordable housing across the region. The availability of affordable housing was, is, and will likely continue to be a critical need in the region, and having such housing is the foundation for individual and familial success. Without actually using the term "priority" at the time, affordable housing had become a WRAG priority area.

In preparing for this strategic planning cycle, WRAG consciously looked at the process of selecting priority areas. How will we choose them? How long is an area of work a priority? What does it mean to be an organizational priority vis à vis staff time and other resources?

The newly reconstituted Program and Policy Committee<sup>2</sup> was asked by the WRAG Board to explore this topic and to develop a process for the selection and phasing out of priorities. Based on their thinking, it was decided that WRAG may have up to four types of priorities that would fall into the following categories:

- A macro-level issue that has universal impact, such as the current work on racial equity.
- A micro-level issue focused in one discrete area, such as the current work on affordable housing.
- A geographic area, such as the current work in Loudoun County, Virginia.
- A membership subset, such as the current focus on WRAG's corporate members.

While staff will focus on the priority areas, working to effect concrete change in those areas, this work will not occur to the exclusion of other issue areas of concern to the membership. WRAG will continue to support convenings around multiple issues and with various subsets of the membership and the general community.

## Strategic Framework

### ► An Equitable Region

What do you think of when you hear the term “Greater Washington region?” The federal government, the national monuments, the beautiful rivers or the rolling hills of the outer stretches – all of these images portray the region that presents to the tourist or to the visitor, but those of us who live here know a different region. As the philanthropic community works alongside its social profit (nonprofit) partners, it is confronted by the double-digit wealth gap,<sup>3</sup> the significant disparity in life expectancy,<sup>4</sup> the unemployment differences,<sup>5</sup> the growth in the multiracial and multicultural nature of the region,<sup>6</sup> and a host of other indicators that reflect an inequitable region. This story is not just an economic one. It is the story of racial and ethnic inequality, often unacknowledged, that demands attention.

For these reasons, the Washington Regional Association of Grantmakers will refine its original focus on regionalism. We continue to recognize that the fate of this region is intertwined geographically. We will continue to coordinate and collaborate across jurisdictions, and WRAG will work, where appropriate, to encourage and participate in that conversation. But, for real success to occur, we now have a broader vision of the role of the philanthropic community in promoting an equitable region. Our eyes have been opened to the reality that when “all boats rise,” the disparity between boats is likely to remain the same. The philanthropic community is committed to working with intentionality over the next two years to promote a region that is equitable for all who live here.

### ► WRAG’s Lasting Value

Lasting value refers to the roots of the Washington Regional Association of Grantmakers as:

- A convener
- A source of knowledge and information
- A voice of philanthropy
- A promoter of relationships and collaboration

Those roots were again acknowledged by the Taproot Foundation’s recent assessment of the value of WRAG. WRAG was born from a recognition of the value of convening and sharing information and learning. It is hard to envision a future in which that is not core to WRAG’s work. So WRAG will continue to convene its members with shared characteristics – the affinity

groups – and around shared funding interest areas via the working groups. The topics may change as philanthropic priorities shift, but the benefit of convening cannot be minimized. Convening will also continue to stretch beyond the philanthropic sector to engage other sectors when a regional need calls for a multi-sector response.

WRAG will also continue to bring to its membership and to the larger community cutting-edge thinking on issues of concern to the region and to philanthropy.

We will continue to be a voice of philanthropy, sharing information of interest to the community via WRAG’s multiple online tools and utilizing those tools as a mechanism for elevating or expressing new and divergent views on issues.

Recognizing the expertise that rests within the working groups and the now active Program and Policy Committee, WRAG will have a strengthened position from which to take public positions on issues as the need arises.

From the birth of the Washington AIDS Partnership before the official emergence of WRAG, the promotion of funding collaboratives along with strong coordinated funding or coordinated knowledge sharing has been core to WRAG’s work. WRAG will continue to be the nexus for incubating, launching, or simply supporting funder collectives that move the needle on challenges facing our region.

### ► A Solid Foundation

Like many social profit (nonprofit) organizations, WRAG is particularly conscious of the need to diversify funding. With WRAG, the need is a bit more acute. First, WRAG is an infrastructure organization, one that, according to our membership, provides a valued and valuable service, but not a service that is essential to individual survival. Secondly, unlike other infrastructure groups that are dependent on dues for a significant portion of their budget, WRAG’s dues-paying members and the source of other possible financial support – the philanthropic sector – are one and the same. Seeking funding from sources other than the philanthropic membership has been a stated goal of the organization since 2011 and will remain a focus area for the foreseeable future.<sup>7</sup>

## A Culture of Evaluation

In 2015, WRAG announced that it was embarking upon a culture of evaluation to routinely assess the impact of its work on the membership. WRAG will continue its efforts to:

- Work with its membership to encourage their participation in the culture of evaluation. Without input from the membership, true assessment of impact is impossible.
- Assess outcomes and impacts against the desired framework.
- Prompt reflection on the outcomes achieved.
- Make course corrections as indicated by the input.

## Conclusion

In 2013, it was suggested that information was doubling every 12 months. Then, IBM suggested that information would soon be doubling every 12 hours.<sup>12</sup> As that prediction moves closer to reality, many organizations are moving away from the World

War II-driven concept of strategic planning. Tightly-defined goals with specific strategic objectives, sharp timelines, designated staff, and defined resources are no longer possible. The reality to which organizations are responding and the resources available to respond are simply growing and changing too rapidly for the old-style strategic plan to be useful. Increasingly, organizations want to be positioned for success with broad guidelines for the work; a qualified, adept staff; a culture of creative thinking; and a willingness to take risks on their journey to success.

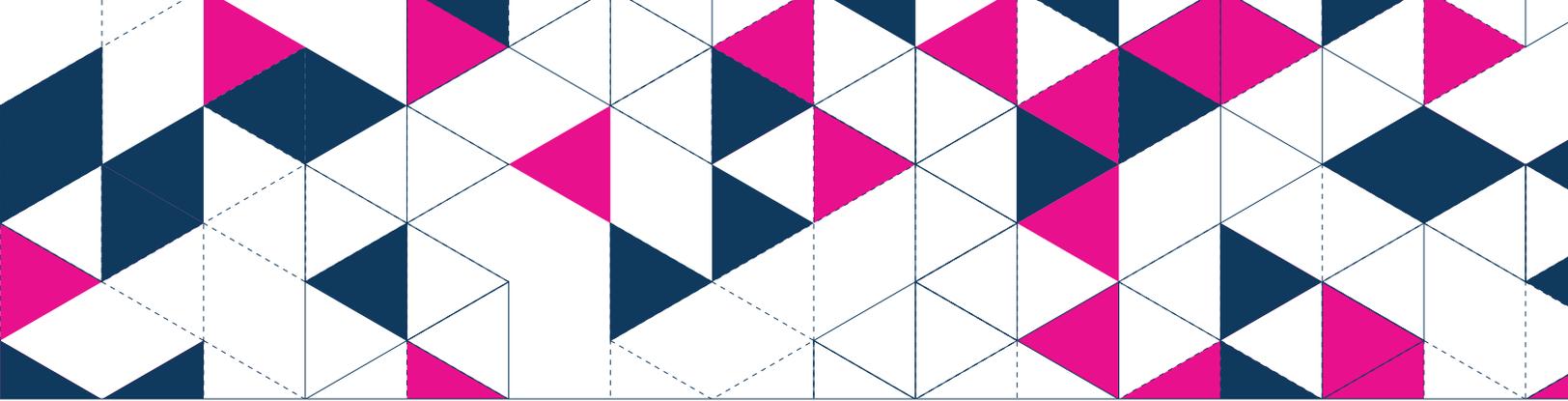
WRAG has evolved into that kind of organization. With the ongoing involvement of our membership in WRAG's culture of evaluation, we will be positioned to support the needs of the region and of local philanthropy for years to come.

We're proud of what we've accomplished to date, and we're ready for the future.

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## Endnotes

- 1 The WRAG Board of Directors is elected by the membership and is comprised solely of leaders of WRAG member organizations. As such, it provides governance for the organization and serves as a representative sampling of the membership.
- 2 The Program and Policy Committee is chaired by the Vice Chair of the WRAG Board of Directors and includes representatives from all of the working and affinity groups and funding collaboratives that fall under the WRAG umbrella, along with three at-large representatives from the membership.
- 3 "In our region, over the past three decades, those at the lowest income level had a -7.2% (negative) change in earned income, while those at the highest end had a 25% increase in earned income." (Source: PolicyLink and USC Program for Environmental and Regional Equity (PERE). *National Equity Atlas*. [http://nationalequityatlas.org/data-summaries/Washington-Arlington-Alexandria,\\_DC-VA-MD-WV\\_Metro\\_Area/](http://nationalequityatlas.org/data-summaries/Washington-Arlington-Alexandria,_DC-VA-MD-WV_Metro_Area/)).
- 4 "Life expectancy at birth – the number of years an average newborn can expect to live – varies by as many as 13 years across Northern Virginia." (Source: Woolf, S. H. et al. [p. 2; 2016]. *A Study in Contrasts: Why Life Expectancy Varies in Northern Virginia*. Center on Society and Health/Virginia Commonwealth University with the Northern Virginia Health Foundation. <http://novahealthfdn.org/wp-content/uploads/csh-nova-report-v10.pdf>). Similar discrepancies exist in the District of Columbia and in other parts of the region. (Source: Institute for Health Metrics and Evaluation. (2012). *U.S. County Life Expectancy: 1989-2009*. Seattle: University of Washington. [www.healthdata.org](http://www.healthdata.org)).
- 5 "While income inequality is growing broadly in the region, particular groups of residents are being disproportionately left behind. For college graduates, men and White, non-Hispanic workers, wages have grown since the start of the recession. Unfortunately, all other groups saw wage losses during this period. As a result, the 'wage gap' in the region has grown between female and male workers; between Black and White, non-Hispanic workers; and between Hispanic and White workers." (Source: The Commonwealth Institute for Fiscal Analysis, The DC Fiscal Policy Institute, and The Maryland Center on Economic Policy. [p. 7; 2014]. *Bursting the Bubble: The Challenges of Working and Living in the National Capital Region*. [http://www.thecommonwealthinstitute.org/wp-content/uploads/2014/06/bursting\\_the\\_bubble\\_2014\\_FINAL\\_web.pdf](http://www.thecommonwealthinstitute.org/wp-content/uploads/2014/06/bursting_the_bubble_2014_FINAL_web.pdf)).
- 6 In 1980 in our region, people of color comprised 32 percent of the population. By 2020, the percentage of people of color is projected to rise to 56 percent. (Source: *National Equity Atlas*. See link in endnote 3.)
- 7 To date, WRAG has established itself as a fiscal sponsor and launched the Institute for Corporate Social Responsibility, as well as other initiatives, as a means of service to the community, enhancing philanthropy, and diversifying its own funding base.
- 8 Schilling, D.R. (April 19, 2013). "Knowledge Doubling Every 12 Months. Soon to Be Every 12 Hours," *Industry Tap*, <http://www.industrytap.com/knowledge-doubling-every-12-months-soon-to-be-every-12-hours/3950>.



## Strategic Planning Committee

### **K. Lynn Tadlock**

Claude Moore Charitable Foundation

### **Yanique Redwood**

Consumer Health Foundation

### **Mary McClymont**

Public Welfare Foundation

### **Rose Ann Cleveland**

The Morris & Gwendolyn Cafritz Foundation

WRAG's strategic framing process was guided by **Suzanne M. Randolph** of the MayaTech Corporation.

## Washington Regional Association of Grantmakers Board of Directors

(as of November 2016)

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Deputy Executive Director

Claude Moore Charitable Foundation

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Northern Virginia Health Foundation

### **David Bowers**

Vice President & Mid-Atlantic Market Leader

Enterprise Community Partners

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Senior Officer for Community Outreach

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Eugene & Agnes E. Meyer Foundation

### **Desiree Griffin-Moore**

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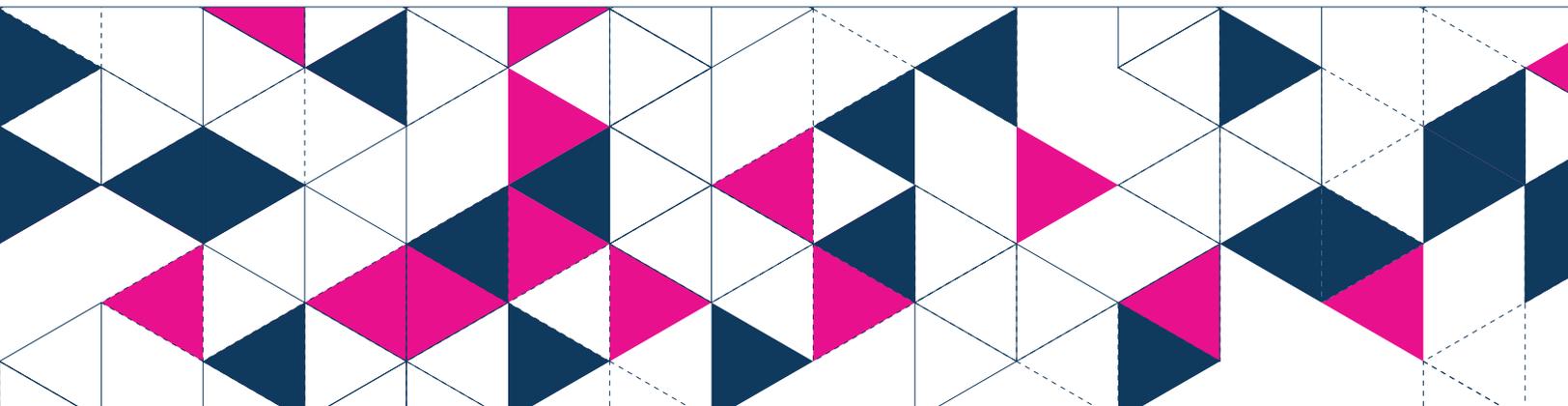
The Community Foundation in Prince

George's County

### **Diana Meyer**

State Director of Community Development

Citi Community Development



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