Strategic Framework 2012 – 2014

www.washingtongrantmakers.org
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The year 2012 will mark the 20th anniversary of the Washington Regional Association of Grantmakers (WRAG) and the beginning of our new, three-year strategic plan.

We took this opportunity to assess our efforts over the last four years. We wanted to determine what worked and build on that while also envisioning a future in which the region’s philanthropic community plays an even more integral role. Once again, we called on you, our members, to guide the evolution of this, your organization. Your message was clear: to facilitate the membership as a dynamic network while helping to channel our collective efforts toward improving the metropolitan region. Based on input from members and community leaders, it is our pleasure to present WRAG’s Strategic Framework for 2012 – 2014:

New Frame, Lasting Value, Solid Foundation

Overwhelmingly, members wanted WRAG to work at a regional level and to respect the fluidity of populations and the shared problems and solutions of our region. We will. You wanted us to continue to host the Working Groups, Affinity Groups, and Funding Collaboratives and to make their work even more robust. We will. And you wanted our organization to continue to be solid and you recognized the need to develop a new business model to strengthen WRAG. We will do that, too.

This document is our roadmap for the next three years. We see it as a shared vision for our future. Let’s get started.

Tamara Lucas Copeland
President

Rose Ann Cleveland
Chair, Board of Directors
Introduction

As we reach the important milestone of our 20th anniversary, it is a good opportunity to reflect on the past and assess the current direction as WRAG heads into the future.


In 2007, you asked WRAG to be the same organization, but better. You asked us to support, educate, and connect members in a bigger way. And you asked that we act bolder. All of this was to be done toward achieving our strategic goal of becoming “the vibrant center of the philanthropic community in the National Capital Region” by the end of 2011.

We think we met your expectations. The Working Groups developed leadership ladders, connected their work to the organization’s priorities, and brought in key leaders in the region. We re-kindled the CEO Affinity Group and introduced the Daily. The Annual Meeting became more substantive and a bit of fun was added in the form of our signature “artistic elements”. 8 Neighbors emerged and played a role in saving funding for the region at a critical time. And, this year, the Philanthropy Fellows program was launched. We think WRAG became better, bigger, and bolder.

Planning for the Future:
The Process

To get input for the new strategic framework, we did the following:

• Had one-on-one interviews with several key leaders, including member CEOs, prospective members, lapsed members, and the leaders of colleague organizations, both within and outside of philanthropy
• Provided an online survey to the staff of every member organization
• Held a Board retreat
• Held a staff retreat
• Reviewed plans from similar organizations across the country

Core of the 2012 – 2014 Framework

We distilled the following from your input:

• You want WRAG to do this work within a frame that acknowledges the interconnectedness of our jurisdictions and works toward building a region united. We saw this as our NEW FRAME.
• You want WRAG to strengthen the network, through internal and external means. We interpreted this as building on what you see as our LASTING VALUE.
• You want WRAG to be a stable organization capable of maintaining a presence in the community for some time. We interpreted this as the need to sustain the organization with a SOLID FOUNDATION.
WRAG was born from a belief in the collective power of philanthropy to make positive community change. That belief remains the guiding principle for the organization.

**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.

**Vision**
We embrace the vision of an equitable region in which all can participate and prosper.

**Strategic Goal**
By 2015, the Washington Regional Association of Grantmakers will have enhanced the philanthropic community’s leadership role in advancing regional goals for a more accessible, sustainable, prosperous and livable region.

**Values**
- Regional lens for all work
- Partnership, both among members of the philanthropic community, and with other sectors – including business, government, and nonprofit – the larger community.
- Coordination and leveraging of fiscal and human resources
- Exposure to new thinking
- The creation and promotion of learning environments
- Diversity and inclusiveness
- Transparency and accountability

**Strategic Objectives**
- Encourage, enable, and support the philanthropic sector’s efforts to ensure a safety net and comprehensive services for all who live in the region.
- Be an advocate and leader in the promotion of regionalism.
- Strengthen the network of grantmakers through formal learning/knowledge-sharing opportunities and through informal colleague-building activities.
- Promote funding alignment and collaboration through the established Funding Collaboratives and/or other entities, as well as in new areas of work.
- Seek partnership opportunities with other sectors that enhance the ability of philanthropy to achieve its goals.
- Serve as the voice of philanthropy, both internally for the network through enhanced communication tools, and externally through a heightened public presence for philanthropy.
- Investigate and pursue financial diversification options.
- Work with members to ensure that we are delivering services that meet their needs in an effort to have a high rate of member retention.
- Seek additional members within designated membership categories.
- Strengthen the WRAG staff and board.
The Environment That Paved the Way for the 2012 – 2014 Framework

“You never want a serious crisis to go to waste”

– Rahm Emanuel, then Chief of Staff to President Obama, speaking before a Wall Street Journal conference of corporate chief executives, November 2008

The economic downturn was the crisis of which Emanuel spoke. It presented a need and an opportunity to the philanthropic community. Fewer dollars at a time of greater need in the community led to new thinking and new partnerships. Foundation CEOs came together to share their struggles and forge mini-learning communities. In a safe space, WRAG Working Group participants discussed aligned giving and how best to maximize their available dollars. And, WRAG released *Beyond Dollars: How Washington Area Grantmakers Are Creating Lasting Impact* in an effort to move the conversation to one looking at systemic reform to address entrenched social problems. The soil has been tilled for broader discussions about social problems and ongoing financial realities have fostered an even stronger environment for collaboration, cooperation and aligned giving.

“Metropolitan organizing is the new civil rights movement”

– Rev. Cheryl Rivera as reported in *This Could Be the Start of Something Big: How Social Movements for Regional Equity are Reshaping Metropolitan America*, co-authored by Manuel Pastor, Jr, speaker at the 2010 WRAG Annual Meeting

Into this situation, ripe for collaboration, came *Region Forward: A Comprehensive Guide for Regional Planning and Measuring Progress in the 21st Century*. Under the leadership of the Metropolitan Washington Council of Governments, the Greater Washington 2050 Coalition developed a comprehensive regional guide for the future. Input came from multiple sectors, including philanthropy. Unlike earlier plans for the region, this one offered targets for the region in nine domains: land use, transportation, environmental, climate & energy, economic, housing, health, education, and public safety. In April 2010, the WRAG Board of Directors endorsed *Region Forward* and subsequently defined what that endorsement meant. The plan was also endorsed by the chief elected official in all twenty-one jurisdictions in the region. WRAG has now begun one-on-one meetings with these leaders. Looking at WRAG’s work through a regional lens is a new frame that is timely and needed and it will provide a valuable context for positive change in our region.

“The status quo is not an option”

– Gabriel Kasper, co-author of the Monitor Institute’s *What’s Next for Philanthropy*, when speaking at the 2010 WRAG Annual Meeting.

While the complexities of our time potentially make the traditional approach to philanthropy not an option, the established vehicles of Working Groups, Affinity Groups, and Funding Collaboratives do provide the structure for new, out-of-the-box thinking. Change doesn’t happen where trust doesn’t exist. WRAG members are looking for new ways to maximize the impact of these convenings so that they are more of a tool for change and not solely a means of learning.

Just as the status quo is not an option for philanthropy, it is not an option for WRAG. While it is appropriate and expected for members to support their organization, WRAG’s current business model is flawed. The time is now for a strategic evaluation of how to maintain WRAG as a viable organization.
NEW FRAME: Regionalism

Overview
In a message to the philanthropic community, Montgomery County Executive Ike Leggett noted that “there are more children eligible for free or reduced price lunches in Montgomery County than there are students in the entire District of Columbia Public School system.” While no one disputed the statistic, some suggested that this was a function of the numbers of people living in the county. While we can spend time debating the level of poverty in Montgomery County versus the perception of wealth, there are some realities that demand our attention. A recent report\(^1\) from the Brookings Institution stated,

- In absolute numbers, more poor people live in suburbs than in cities.
- Poverty has grown five times faster in the suburbs than in the cities over the last decade.
- The capacity of nonprofits in the suburbs to support the growing number of poor varies widely.

The WRAG community has been acknowledging the demographic shifting of needs for some time. Several years ago, members honed in on the needs of Prince George’s County and established the Partnership for Prince George’s County, a vehicle for the pooling of finances and intellectual capital. Your resources have supported the replication/adaptation of urban models to the inner suburbs across the region. And, with great astuteness, some within the WRAG community are suggesting that the urban-based philanthropic community has a responsibility to shift its vision a bit to see that poverty in the outer reaches of the region may have a more rural feel, a perspective that will be decidedly new for philanthropists in this region. The Board of Directors of the Washington Regional Association of Grantmakers took the first step toward a more regional frame when it endorsed Region Forward: A Comprehensive Guide for Regional Planning and Measuring Progress in the 21st Century. It was the Board’s contention that the focus of this plan across nine critical domains represents a viable, comprehensive and coordinated action agenda. The Board appreciated the plan’s acknowledgement of the multiple interconnected components necessary to create a complete community, not just land use and transportation concerns, for example, but also quality educational opportunities and the provision of services to meet health and human service needs. The WRAG Board then went one step further and overtly stated the need for a social justice lens to ensure that the needs of all residents in the region are met. Region Forward provides a viable organizing tool for the work of WRAG, our members, and the region as a whole.

Objectives
WRAG will:

- Encourage, enable, and support the philanthropic sector’s efforts to ensure a safety net and comprehensive services for all who live in our region.
- Be an advocate and leader in the promotion of regionalism.

Measures of Success
WRAG will claim success if by 2015 the following has occurred. WRAG has:

- Mobilized members toward increased investments in under-invested parts of the region.
- Actively engaged the convening groups with appropriate, i.e., issue-specific, appointed officials across the region.
- Defined and had measurable accomplishments toward one or more targets within the Region Forward plan.
- Worked to define a unified regional vision.

\(^1\) Sarah Reckhow and Margaret Weir, “Building a Stronger Regional Safety Net: Philanthropy’s Role” (Metropolitan Policy Program, Metropolitan Opportunity Series, Brookings Institution, July 2011)
LASTING VALUE: Convening, Collaborating and Communicating

Overview
Networker, information sharer of news and trends, facilitator of collaborations and partnerships, and convener were the top terms members used when expressing the value of WRAG during the strategic planning process. Those terms capture the reason that WRAG was established almost 20 years ago and they reflect the time-honored value of an association: a “place” for the sharing of ideas, best practices, resources, and wisdom with others who have a similar purpose. As the saying goes, “if it’s not broke, don’t fix it.” We believe that the core of WRAG’s work isn’t broken.

We will build on the rich tradition of Funding Collaboratives, the Working Groups, and the Affinity Groups, and work to enhance WRAG’s communication and marketing ability. We will innovate and create within this established structure and work to enhance the impact of these vehicles. WRAG will also coordinate its training opportunities with other organizations to avoid duplication and maximize resources.

Objectives
WRAG will:

• Strengthen the network of grantmakers through formal learning/knowledge-sharing opportunities and through informal colleague-building activities.
• Promote funding alignment/collaboration through funding collaboratives and/or other entities as well as in new areas of work.
• Seek partnership opportunities with other sectors that enhance the ability of philanthropy to achieve its goals.
• Serve as the voice of philanthropy, both internally for the network through enhanced communication tools, and externally through a heightened public presence for philanthropy.

Measures of Success
WRAG will claim success if by 2015 the following has occurred:

• WRAG’s convening groups are acknowledged as playing key leadership roles in addressing designated deficits in the region.
• The work of WRAG’s convening groups is valued by a growing majority of the WRAG membership.
• WRAG has played a role in establishing a knowledge collaboration or funding collaboration/alignment to address a region-wide issue.
• WRAG is acknowledged as the source of information broadly on philanthropy in the region.
• WRAG represents its membership proactively to the community outside of philanthropy.
Overview
Membership organizations typically rely on members to pay dues, purchase organizational products and pay registration fees to participate in organizational seminars or conferences. That is not unusual. Then membership organizations approach foundations and corporations for grants to support special initiatives, thereby subsidizing the member contributions with philanthropic support. Therein lies the problem for WRAG and for every other regional association of grantmakers across the country. For us, our members and our sources of outside support are one and the same.

We know that our members carefully consider the value proposition of supporting WRAG or providing a grant to a direct service organization. We also recognize that this internal discussion must be even more difficult at times of great need for the community. However, we believe that members + WRAG = a powerful, collective impact.

WRAG has for some time recognized our level of reliance on members for support. We have brought in outside consultants to examine our dues structure. We have even considered a broader membership pool but decided that while some minor expansion could, and did, occur, we want to respect the nature of our safe space for funders and we don’t want to invade the purview of any of our colleague organizations. We have looked at the other regional associations of grantmakers and not discovered any financial sustainability approaches that can be replicated here.

WRAG understands that financial management is not solely bringing additional revenue into the organization, it is also managing expenses. The overall budget has decreased annually for the last three years as staff have attempted to maintain a high level of member services with a smaller complement of staff.

Recognizing these factors, we, nonetheless, understand that we must diversify our funding base to ensure that we have a financially secure entity capable of supporting the philanthropic community in our region.

Objectives
WRAG will:

• Investigate and pursue financial diversification options.
• Work with members to ensure that we are delivering services that meet their needs in an effort to have a high rate of member retention.
• Seek additional members within designated membership categories.
• Continue to strengthen the WRAG staff and board.

Measures of Success
WRAG will claim success if by 2015 the following has occurred. WRAG has:

• Two streams of revenue, amounting to 10% of our budget, different from those in place in 2011.
• A 90% or above retention rate for members.
• A 5% annual rate of growth in membership.
• Provided professional development opportunities to all staff every year and conducted annual staff evaluations.
• An engaged Board as evidenced by 90% of the Board routinely participating in Board meetings.
Conclusion

The Washington Regional Association of Grantmakers is committed to being a part of the change that we want to see for our region.

In 2009, we began a conversation about the role of the grantmaking community that went beyond philanthropic dollars to effect change. That was our foundation. We have continued to build on that discussion. We will work with our members over the coming years toward a region united. We will facilitate partnerships, leverage resources, identify needs, and be an advocate for progress in our region.

Between the beginning of 2012 and the end of 2014, we will work within the new frame of regionalism, build on what you have deemed as our lasting value, and strengthen our foundation so that we can be your membership association for years to come.
To plan comprehensively and well, you need input from those who are intimately a part of the work, those who might benefit from the work, and those who are affected by the work.

Thank you to all of the WRAG members who took the time, through surveys and personal conversations, to reflect on our current body of work and provide guidance on our future.

Thank you to those outside of the philanthropic community who helped us envision the role for WRAG in moving forward our shared vision for the region.

Thank you to Michela Perrone of MMP Associates for her expert oversight of our strategic planning process.

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- Diana Meyer, Citigroup
- Rick Moyers, The Meyer Foundation
- Margaret O’Bryon, Consumer Health Foundation
- Kristin Pauly, Prince Charitable Trusts

They gave generously of their time and knowledge in shaping what we think is a clear, cogent, and thoughtful plan for how the Washington Regional Association of Grantmakers can work over the next three years to make our region a better place to live, work, and play.
2011 WRAG Staff

Core Staff
Tamara Lucas Copeland
President
copeland@washingtongrantmakers.org

Gretchen Greiner-Lott
Vice President
greiner-lott@washingtongrantmakers.org

Christian Clansky
Communications Manager
clansky@washingtongrantmakers.org

Rita Cook
Chief Financial Officer
cook@washingtongrantmakers.org

Katy Moore
Director of Member Services
moore@washingtongrantmakers.org

Rebekah Seder
Program Coordinator
seder@washingtongrantmakers.org

Rita Vaught
Accounting Manager
vaught@washingtongrantmakers.org

Working Group Consultants
Kathy Freshley
Coordinator, Working Group on Aging
freshley@washingtongrantmakers.org

Phyllis Kaye
Coordinator, Health Working Group
kaye@washingtongrantmakers.org

Erica Pressman
Coordinator, Public Education Working Group and Children, Youth, and Families Working Group
pressman@washingtongrantmakers.org

Washington AIDS Partnership
J. Channing Wickham
Executive Director
wickham@washingtongrantmakers.org

Jennifer Jue
Program Officer
jue@washingtongrantmakers.org

Sapna Khatri
Program Associate
khatri@washingtongrantmakers.org

Community Development Support Collaborative
Marty Mellett
Director
mmellett@lisc.org
2011 WRAG Board

Rose Ann Cleveland, Chair
Executive Director
The Morris & Gwendolyn Cafritz Foundation

Terri Lee Freeman, Vice Chair
President
Community Foundation for the National Capital Region

Rick Moyers, Treasurer
Vice President, Programs & Communications
The Meyer Foundation

Patricia N. Mathews, Secretary
President & CEO
Northern Virginia Health Foundation

Diane Bernstein
President
Diane and Norman Bernstein Foundation

Tamara Lucas Copeland
President
Washington Regional Association of Grantmakers

Wilton C. Corkern, Jr.
Trustee
The Corina Higginson Trust

Margaret Meiers
Senior Director, Community Relations
Freddie Mac
Vice President, Programs
Freddie Mac Foundation

Diana Meyer
State Director for Community Relations
Citigroup

Margaret O’Bryon
President & CEO
Consumer Health Foundation

Anna H. Powell
Community Affairs Manager – MD, DC & VA
Wells Fargo Philanthropy Team

Daniel Solomon
Vice President
Naomi & Nehemiah Cohen Foundation

K. Lynn Tadlock
Deputy Executive Director of Giving
The Claude Moore Charitable Foundation

Carol Thompson Cole
President & CEO
Venture Philanthropy Partners

George Vradenburg
President
Vradenburg Foundation