Foundant Data Project:
Identifying Opportunities for Collective Impact for Philanthropy in the Philadelphia Region

Introduction

In an era of big data tools and opportunities, philanthropy is in catch-up mode. Without common systems for collecting and sharing data, it is impossible for philanthropy as a field to answer a basic question: where do foundation dollars go? This paper presents a concept for a pilot project in the Philadelphia region to explore what 24 local foundations can learn by sharing aggregate data, led by two foundations, North Penn Community Health Foundation and Genuardi Family Foundation, in partnership with Foundant Technologies. Our hope is that we will have the opportunity to identify trends, gaps, and opportunities for using data to deepen our collective and individual impact.

Background

There is an increased focus on accountability and transparency in philanthropy that goes beyond current IRS requirements. Charity watchdog groups are developing and using charity rating methodologies and using metrics that may not be the best measure of success nor adequately reflect the strength of charitable organizations. Independence is a strength that allows foundations to invest in innovative approaches and grassroots work, and take on risks that governmental funders often cannot. In order to maintain the independence that foundations currently have, building stronger more comprehensive and collaborative systems that measure the investment and impact of the field is critical, providing foundations an opportunity to proactively and voluntarily collect data --rather than by governmental mandate—that can shape and improve our work as funders. Additionally, given an ever-intensifying focus on performance and outcomes there is a continued need to streamline processes and reduce the burden on nonprofits to free up more time and money for mission-related activities. Only by working together can foundations and nonprofit organizations advance their shared commitment to maximizing the impact of their assets and efforts.

Given this landscape, funders have been asking how we can better use existing data to inform and improve our work. Many organizations and individuals in the philanthropic sector are working at various levels to create better systems to collect and make meaning of data to better inform practices and provide insight into how philanthropic giving programs are directing their resources. Among them, the Council on Foundations, the Forum of Regional Associations of Grantmakers, Guidestar, the Technology Affinity Group, Grants Managers Network and D5 are working toward developing broader field-wide data collection standards to be able to answer field-wide questions and to foster a commitment to collecting and sharing information. Strong data collection systems will support the ability to tell concrete stories of which projects and populations foundations are investing in, and to identify those gaps in funding that may represent opportunities for impact.

Although we are all working for the common good, philanthropic organizations approach their work differently, using different strategies and collecting different types of data. Given the limited resources available and growing needs and opportunities, the importance of building a shared understanding of our impact is becoming more urgent, and the tools for doing so are within our reach.

Your Participation

How can we as funders work to eliminate duplication, allowing more resources to be used for the common good? How can we as a collective group have more impact in our region? How can we work collaboratively to support the need for field-wide standards?

We've identified a target sample group of 24 philanthropic giving programs in the Philadelphia region that currently use Foundant GLM as their grants management software. We asked:

- What might we be able to learn if we, as a group of funders, examine our consolidated data?

- What information are we currently requesting of our respective applicants; what are commonalities and differences?

- What information are we collecting, or how do we "code" and "track" data related to organizations and grants?

- Are many of us funding the same organizations or issue areas? Are there pivotal organizations doing work in these areas that are unknown to all but one or a few of us?

- Are there opportunities to reduce the burden on grantees and streamline our operations?

- What conclusions can we draw about our collective impact as a "group" of funders on various social issues in the region?

In order to learn more about what is happening in our region while contributing to field-wide data collection development, we are proposing a limited project to see if we can answer some of these questions and determine what we might be able to learn if we share data.

We request your organization's permission to allow Foundant to access the data in your GLM database to generate aggregate reports to evaluate what we may be able to learn about regional giving and foundation data collection practices. While we recognize that this is a very small sample of all of the funders in the region, together we represent a diverse complement of funders. We hope to use this "proof of concept" to see what we might learn when we share data. **We promise that your applicants' individual data will be kept confidential and detailed foundation data will not be shared. Only Foundant staff will have access to individual foundation records. The aggregate data and the results of the project will be shared with you**.

Data

In order to begin this project we propose to capture the following data in order to determine if there are any trends or synergies that can be demonstrated.

- Organization Name – total amount funded, number of grantmakers with approvals/denials to each

- Target Population

- Program Area

- Geographic Area

- Funding Type, such as single year vs. multi-year or general operating vs. program support

- Organization Type, how do foundations classify the applicant organizations?

- Trends for the type of questions asked on LOIs, applications and grant reports such as mission statement and financial information, and how/whether foundations request information on standardized forms (e.g., budget forms or board lists)

- Trends in how project participants use Foundant GLM:

    o Average # of Administrators per site

    o Average # of applications processed per year per site

    o Number of GLM sites using various features such as: evaluator functionality, custom print packets, mail merge documents, follow up forms and saved reports.

We hope to learn what type of data your foundation is collecting, what it can tell us (and what can't it tell us), with the goal of helping us all do our work more efficiently and effectively. The outcome of this first phase of the project will inform possible next steps. Depending on the results we may pose some new questions such as:

- Can Foundant develop additional capabilities in the software for enhanced tracking or shared knowledge?

- Can this project inform or influence the existing efforts at developing data tracking systems?

- Can this inform the regional conversation in any valuable way, such as recommendations for standards about what kind of data to collect and share?

Timeline

April 29, 2014 – Initial deadline for preliminary approvals to allow us to demonstrate some preliminary findings and "proof on concept" data

May 2, 2014 - Project concept, scope and preliminary data presented at the Philadelphia Area Foundant Users Group (North Penn Community Health Foundation, 12:30 – 4:00).

To register for Philly Area User Group: http://www.foundant.com/wp/events/philadelphia-user-group/ or contact Ami Adams, Regional Sales Director, 406.922.5119, ami.adams@foundant.com

May 2014 – Continued outreach to obtain foundation commitment to participate and fine tuning of project.

June 2014 - Results of report shared with participant foundations.

To participate in this project or to learn more please contact:

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If this project does not appeal to you, we'd like to learn about your hesitation to help refine our future outreach. Please confidentially share any concerns with us; we would deeply appreciate your insights and candor.

Thank you for your thoughtful consideration and for your commitment to bettering the field of philanthropy in our region.

TO PARTICIPATE PLEASE SIGN BELOW WHERE INDICATED AND RETURN THIS FORM TO
Daren.nordhagen@foundant.com

"I have read the information in this document and grant Foundant permission to utilize our GLM data in the manner described."

_____
FOUNDATION

_____
NAME

_____
TITLE

_____
SIGNATURE

_____
DATE