

FUNDAMENTALS OF FAMILY PHILANTHROPY WEBINAR

Building a Social Impact Strategy and Approach

June 10, 2021 | 12-1:15 PM ET

Featuring:

Melissa Berman, Rockefeller Philanthropy Advisors

Kara Carlisle, McKnight Foundation

Robert Dortch, Robins Foundation

Fundamentals of Family Philanthropy

The monthly *Fundamentals of Family Philanthropy* webinar series provides guidance on the core tenets of effective family philanthropy—from motivations and values to governance, grantmaking, and succession. The series equips giving families with the latest information on evergreen topics in the donor lifecycle through practical takeaways and diverse family stories that illustrate important practices. Designed for seasoned practitioners and newcomers alike, the series is available to our Friends of the Family and Partner Subscriber organizations.



Building a Social Impact Strategy and Approach
June 10 | 12-1:15pm ET



Grantee Relationships and Power Dynamics
July 8 | 12-1:15pm ET



Impact, Measurement, and Evaluation
August 12 | 12-1:15pm ET

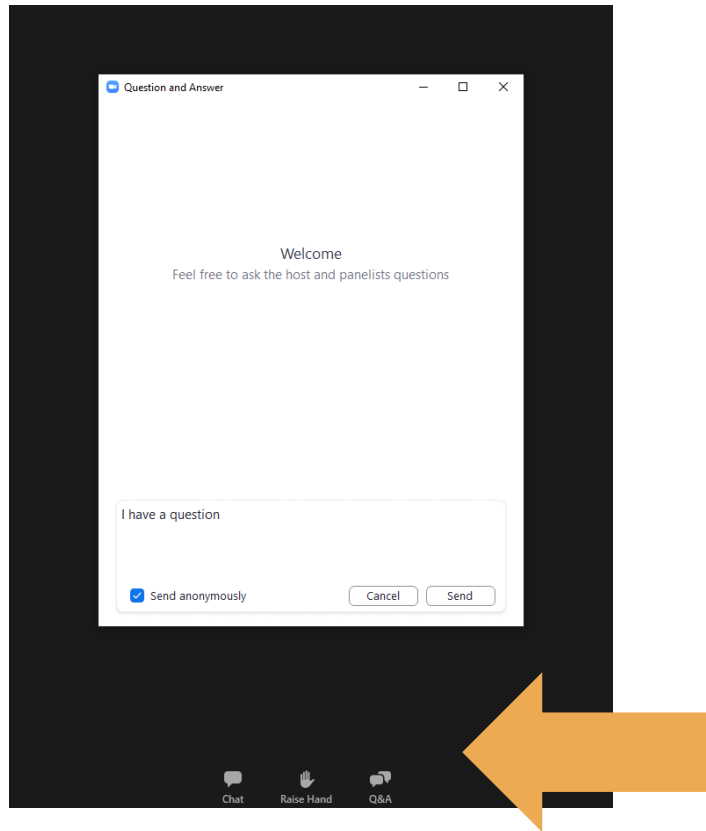


Scaling for Success
September 9 | 12-1:15pm ET

Today's Conversation

- What is a **social impact strategy** and why is it important to a family philanthropy effort?
- How do you develop a social impact strategy, and what are the **important considerations** when **crafting or refining strategy**?
- How do you define your **grantmaking approach** and **practices** in tandem with your strategy?

Submit Your Questions



Submit your questions into the Q&A box on your control panel at the bottom of the screen or use the chat.

Webinar Logistics

- If you have sound problems listening through your computer, try switching to a landline telephone or cell phone
- To ask a question, type it into the Q&A box on your control panel at the bottom of your screen or use the chat.
- If you experience technical problems, please use the question box or email jen.crino@ncfp.org. Should there be a broader technical issue, we will send an email and share a message on screen
- This webinar is recorded and a replay will be made available to the field
- You may chat with us on twitter during or after the webinar using the hashtag #ncfpweb
- Keep an eye out for our post-webinar survey. We rely on your feedback!

Today's Speakers



Melissa Berman

President and CEO

Rockefeller
Philanthropy Advisors



Kara Carlisle

Vice President of
Programs

McKnight Foundation



Robert Dortch

Vice President of Program
and Community Innovation

Robins Foundation



Building a Social Impact Strategy and Approach: Fundamentals of Family Philanthropy

*NCFP Webinar June 10, 2021
Melissa A. Berman, President*

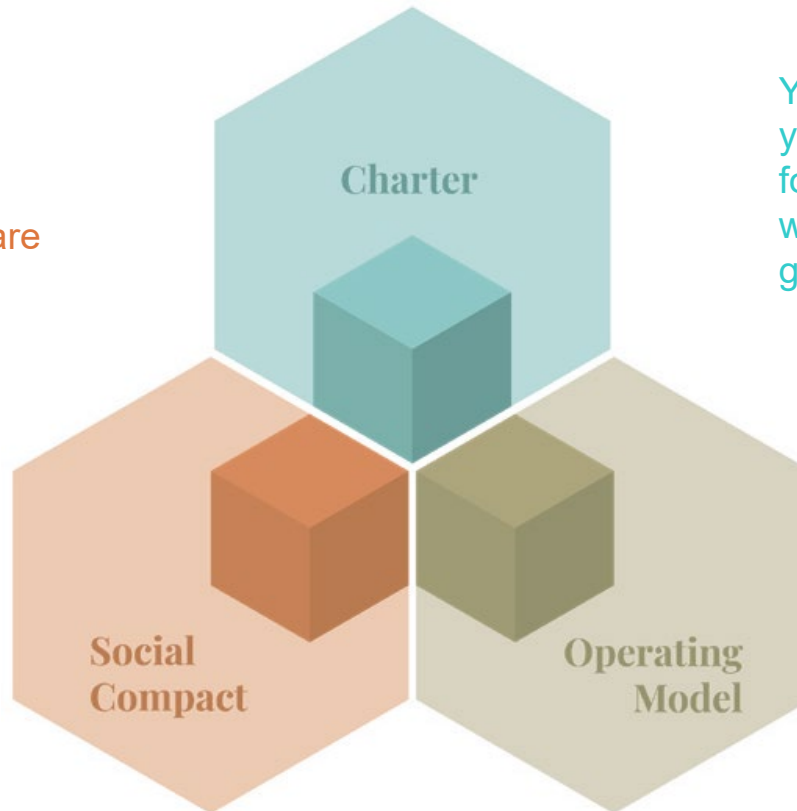
Twitter: @RockPhilanth #ScalingSolutions #SystemsChange

Some Guiding Principles

1. Assess your Philanthropy Framework
2. Design a roadmap to results
3. Choose ways to assess impact
4. Explore new(ish) and promising funding practices

(1) Your Philanthropy Framework

Your social compact defines to whom you are accountable, which stakeholder views you incorporate, and what makes you legitimate.



Your charter defines how you relate to your founder(s) and your written/unwritten governance.

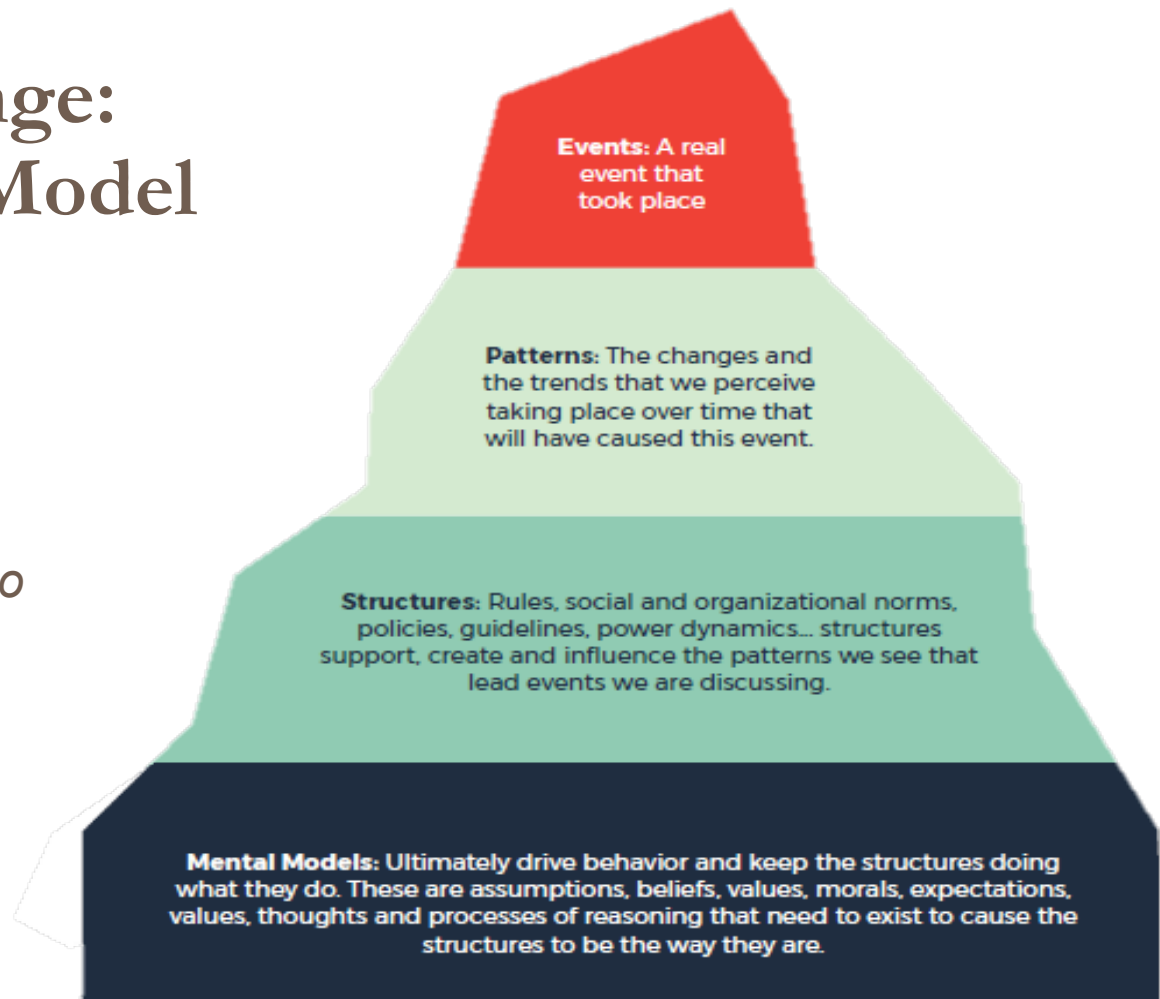
Your operating model explains what knowledge, competencies and resources (financial and non-financial) you can or will use to accomplish your goals.

(2) Design a Roadmap to Results

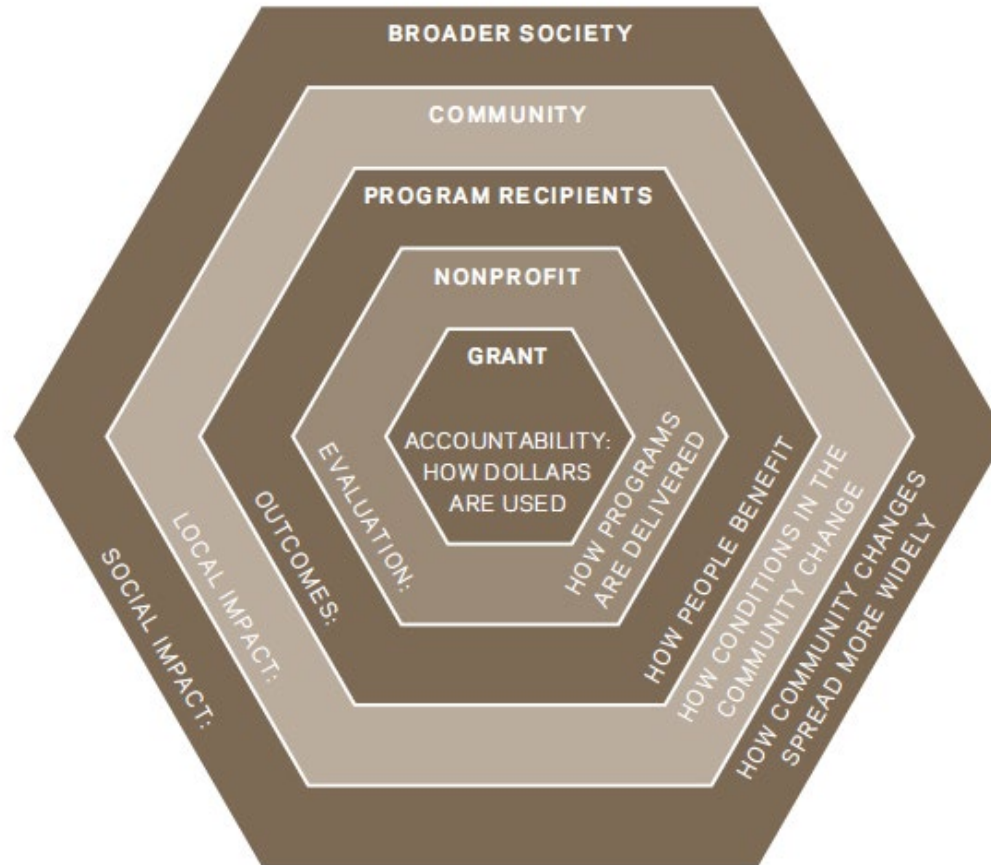
1. Clarify who will define the problems to be addressed, set goals, gather input, and make decisions.
 - Is this consistent with your charter? If not, you may need to revise it.
2. Clarify who will have input, and what kind of input will be important for decisions.
 - Is this consistent with your charter? If not, you may need to revise it.
3. Conduct a landscape scan
 - Understand the issue, and the system(s) it lives among
 - Understand who is active in these systems, including who can be partners/allies
4. Decide where in the system you will focus your resources, what level of resources, and what type of resources
5. Decide on a time horizon and an approach to assessing impact

Systems Change: The Iceberg Model

Funders can create meaningful change by acting in any of these levels – but are likely to be more effective if they have mapped the iceberg.



(3) Options for Assessing Impact



(4) New(ish) and Promising Funding Practices

1. Trust-based Giving
2. Participatory philanthropy
3. Long-term support
4. Funder collaboratives
5. Funding with a rights and equity lens
6. Impact investing
7. Assessing your foundation's strategic time horizon

Discussion

Next *Fundamentals of Family Philanthropy* Webinar

**JULY
8**

Grantee Relationships and Power Dynamics

Power dynamics are inherent in traditional philanthropy. Learn how to build authentic relationships with grantees through trust-based practices and other approaches that will reduce power imbalances and lead to more effective partnerships.

Register at ncfp.org/events

Join a Peer Network

Peer networks are for those interested in connecting to family philanthropy colleagues with similar objectives, challenges, and shared experiences.


**Engaging Youth | Non-family Staff |
Strategic Lifespan | Board Chairs**

Email Katie.Scott@ncfp.org to learn more and join

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**Thank you for
joining us!**

**NCFP will send a recording and related resources
for the webinar to all attendees.**

Your feedback is critical to our work!

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