

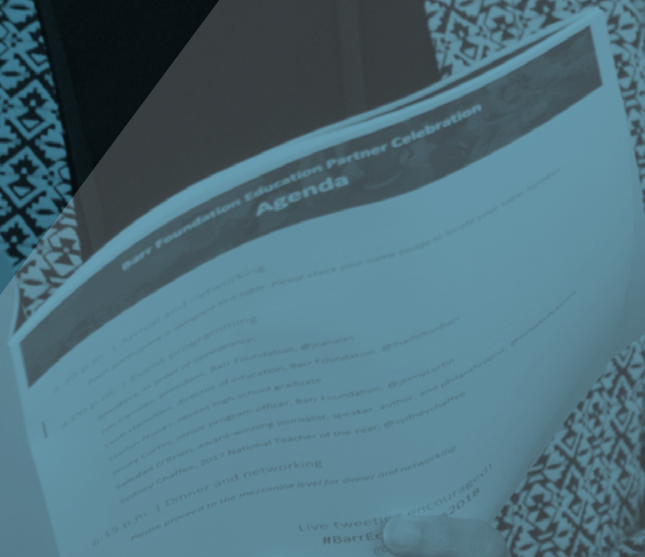
Narrowing the Power Gap: Humility, modesty, and curiosity at the Barr Foundation

To transform the practice of philanthropy into the practice of principled grantmaking, we worked with our members to develop five Principles for Peak Grantmaking—Tie Practices to Values; Narrow the Power Gap; Drive Equity; Learn, Share, Evolve; and Steward Responsively. *Learn more at peakgrantmaking.org/principles.*

Through our Case Story series, we tap the wisdom, candor, and experience of PEAK Grantmaking members who generously share their journeys to advance principled grantmaking practices by applying these Principles. In this Case Story, we focus on the Principle Narrow the Power Gap.

Narrow the Power Gap

Use practices and policies to help narrow the power gap between grantmakers and grantseekers, and value equally the resources each brings to the partnership.



Core Values and Candid Feedback

The Barr Foundation is one of the largest private foundations in New England. With an endowment of \$1.8 billion, and a \$90 million grantmaking budget in 2019, Barr's core programs are arts and creativity, climate, and education.

So how does the Barr Foundation, governed by a five-member board,¹ narrow the philanthropic power gap between itself and grantees?

Director of Grants Management Kerri Hurley believes that narrowing the power gap begins with the Foundation's mission statement and stated values. Their mission, "to invest in human, natural, and creative potential, serving as thoughtful stewards and catalysts" signals the importance of "how" it works with partners: by thoughtfully focusing on potential, and being a catalyst and steward. Two of Barr's values reinforce this emphasis on service in prescribing how the foundation sources and thinks about its partners.

Barr Foundation Core Values

Strive for excellence: We aim for the highest standards of performance, integrity, and service in all dimensions of our work.

Invest in leaders: We support effective, visionary, and collaborative leaders, as they motivate others, drive change, and produce results.

Act with humility and modesty: We approach our activities with respect for our partners, an understanding that solutions reside with those we serve, and recognition of the privilege inherent in philanthropic work.

Adopt a long-term perspective: We take the long view, considering the implications of today's decisions for future generations.

Embrace risk: We pursue ambitious goals, which requires a comfort with the risk of failure.

Demonstrate curiosity: We actively solicit new perspectives to inform our work, and are committed to collaboration and partnership.²





"It starts with comprehending the power imbalance," said Hurley. "This is tied to the Foundation's core values. We try to ensure all our interactions with grantees reflect those values. There may always be a power imbalance, but we can strive to mitigate it as much as possible." Those values are transmitted from trustees to staff, along with an understanding that Barr is just one piece of the puzzle. "Modesty and humility come from seeing what grantees are doing in the community, and that our role is a helping role: the impact that our grantees are making is what's most important."

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The Foundation also participates in Glass Pockets³ and shares the results of its Center for Effective Philanthropy [CEP] Grantee Perception Report⁴, two additional ways they express their commitment to transparency, willingness to share, and efforts to improve their own performance.

1. The Foundation expanded its board from three to five members in 2017 and has plans to continue increasing the size of its board over time. [barrfoundation.org/about]

2. Core Values: barrfoundation.org/about

3. glasspockets.org/glasspockets-gallery/who-has-glass-pockets/barr-foundation

4. barrfoundation.org/blog/barr-foundation-gpr-results

Here are three practices they deploy and recommend for narrowing the power gap:

1. Use Feedback to Improve Grantmaking Process

Four times since 2003, the Barr Foundation has worked with the CEP to survey its grantees and identify areas for improvement. In 2018, the Foundation published a blog post written by its president and vice president sharing lessons learned, guiding principles, and initial steps it would take toward improvements. The Barr Foundation was most troubled by its rating as merely "typical" in terms of the quality of its relationships with grantees.

Hurley calls this feedback a "big catalyst." With the Foundation's director of evaluation, she co-chaired an internal working group made up of representatives from each program and other parts of the organization. "We didn't just focus on the survey. We also asked CEP to conduct focus groups with grantees to get some really tangible ways for Barr to respond," said Hurley. The entire staff went through the Barr Foundation submission process "to feel the administrative burdens" experienced by grant seekers. The primary goal was to reduce demands on grant seekers. However, staff also looked for ways to reduce the administrative burdens for staff in order to create more time to focus on grantee relationships.

"We tried to make the process as simple as we possibly could. We accepted applications submitted to other funders. Even the reporting requirements were made more flexible: Grantees could provide reports used with other funders... It was great for us, as a staff, to see ourselves doing this work in a timely and effective way, to let grantees just focus on the work they were doing. It was a great experiment."



2. Implement flexible practices to reduce the burden on grantees.



Another key goal of this work has been to implement more flexible practices. The Barr Foundation has begun experimenting with ways to adjust its grantmaking practices to align better with grantees' needs.

For example, as part of a special initiative on democracy, the foundation accepted applications submitted to other funders. The reporting requirements were also made more flexible: Grantees could also provide reports used with other funders. These practical steps didn't just make it easier to get this set of grants out more quickly.

"The feedback we received from grantees was very positive," said Hurley, adding that "they appreciated the simplified process and wished their experience was like that more often."

Foundation staff had a similar perspective: "It was great for us, as a staff, to see ourselves doing this work in a timely and effective way, and to let grantees just focus on the work they were doing," said Hurley. "It was a great experiment with ways in which we could adjust Barr's process."

3. Maintain clear, direct, and accessible communication to build respectful relationships.

Having been with the Barr Foundation for over 19 years, Hurley brings a unique perspective to the adaptive journey that the foundation has taken, from fewer than five staffers to nearly 40 (including a three-person grants management team). With the exception of questions that are content-specific, it is the grants management team that serves as the primary point of contact for grants administration questions with the Foundation's diverse group of grantees on a daily basis.

From the very beginning of the grantseeking process, the Foundation aims to be clear about who the best contact is, important dates and deadlines, and what to expect from the relationship. Even though the majority of Foundation grants are initiated by staff, the Foundation has increasingly used open Requests for Proposals to expand its reach and networks. Additionally, all programmatic inquiries receive a response, with "cold inquiries" promised a reply within one month, and existing grantees receiving responses as soon as possible. Grantee email inquiries are sent to the entire grants team, explained Hurley, who added that "someone being on vacation or out of the office is not a barrier to receiving a response in a timely fashion."

While the CEP survey provided strong motivation, being responsive to feedback from grantees has become an ongoing commitment. Hurley summed it up this way: "Grantee relationship building, and continually defining just what that means: This is our work. Having clear, direct communications about why a report is requested, and what will be done with it, builds trust. When a grantee submits a report, they need to know someone here is reading it, that everything we ask from them is serving a purpose."



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The Barr Foundation's trustees have played a significant role in helping shape Foundation practices and policies that represent a commitment to respectful relationships. "It was the trustees who suggested looking through every step of our grantmaking process," said Hurley. "They even said, 'Look, you don't need to produce all this content for us. You can rethink all of it.' They continually challenge and support our efforts to look toward improvement."

"With encouragement from our trustees to rethink each step and every document, we found items for board books that the board did not really require, or which could be simplified," Hurley said. "Did we have to ask for a formal concept paper, requiring grantees to go through a two-step process? Or could we give program staff the flexibility to blend two steps into one when appropriate, and simplify internal processes and documentation requirements? Could we make the proposal itself smarter by asking fewer questions and requiring fewer attachments, requiring less time of everyone?" While the change process is ongoing, the board's permission and encouragement to clarify, simplify, and reduce grantee burden was a highly important factor. The commitment to narrowing the power gap between the Barr Foundation and its grantseekers and grantees continues to be a focus for the Foundation.

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What's Next

The CEP survey made it clear that the Foundation had work to do. "It's right there in our core values: *strive for excellence*. For us, that means being a true partner in every sense of the word," said Hurley.

The Foundation wants to continue its focus on strengthening foundation-grantee relationships and narrowing the power gap. Rather than arriving at a specified finish line, however, the Foundation sees grantee perception reports, focus groups, feedback loops, and transparency as intentional and on-going steps. The Barr Foundation's core values drive its commitment to improving grant practices and grantee relationships, and to achieving its mission more equitably and effectively.

Contributors

Kerri Hurley manages the Barr Foundation's grantmaking team, supporting staff and grantees through every stage of the grantmaking process. She currently serves as a PEAK Grantmaking Board Member.

Kerri was interviewed by Elizabeth Myrick, principal of Elizabeth Myrick & Associates Consulting, LLC. She worked with PEAK Grantmaking to develop this case story. For over two decades, she has worked with grantmakers and philanthropy-serving organizations to build leaders and cultures that learn and grow. Elizabeth serves as a guide, coach, and project manager to help organizations analyze and implement strategies, collect and synthesize data, tackle organizational challenges, and measure progress.



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Practice meets purpose at PEAK Grantmaking, a member-led national association of more than 4,000 professionals who specialize in grants management for funding organizations. Our members come together to form a vibrant community of grantmaking practice that advances shared leadership and learning across the sector. By cultivating resources, learning opportunities, and collaborations across the philanthropic spectrum, we champion grantmaking practices designed to help funders of every size and type maximize their mission-driven work through living their values.

Learn more at peakgrantmaking.org, contact us at info@peakgrantmaking.org, and follow @PEAKgrantmaking on Twitter.