Grant Seeking 2.0: Engaging Next Generation Board & Staff

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Ahoy! Sea Change!

What it Means

- Next generation leaders on board and staff
- Younger leaders moving rapidly into senior positions
- Growing diversity in leadership
- Changes in the grantmaking landscape
- Family foundations led by younger donors growing rapidly into large competitive grantmakers
- New institutional donors opting for donor-advised funds
Nearly one-third of the 100 largest grantmakers were founded in the last 30 years.

10 Largest Private US Foundations (in billions)

<table>
<thead>
<tr>
<th>1988</th>
<th>2018</th>
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<tbody>
<tr>
<td>Ford Foundation $12.6</td>
<td>Bill and Melinda Gates $51.6</td>
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<tr>
<td>J. Paul Getty Trust $9.6</td>
<td>Open Society Foundation $19.6</td>
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<tr>
<td>W.K. Kellogg Foundation $8.3</td>
<td>Lilly Endowment $15.1</td>
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<tr>
<td>MacArthur Foundation $3.1</td>
<td>Ford Foundation $13.7</td>
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<tr>
<td>Robert Wood Johnson Fdn $4.3</td>
<td>Robert Wood Johnson Fdn $11.4</td>
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<tr>
<td>Lilly Endowment $4.0</td>
<td>Hewlett Foundation $8.7</td>
</tr>
<tr>
<td>Rockefeller Foundation $3.9</td>
<td>W.K. Kellogg Foundation $8.2</td>
</tr>
<tr>
<td>Andrew W Mellon Fdn $3.4</td>
<td>Pew Charitable Trusts $6.6</td>
</tr>
<tr>
<td>Pew Memorial Trust $3.2</td>
<td>Gordon and Betty Moore Fdn $6.4</td>
</tr>
<tr>
<td>Kresge Foundation $2.0</td>
<td>Packard Foundation $6.3</td>
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1988 figures in 2018 dollars

Two Generations Growing in Influence

**GENERATION X (1965-1980)**

What Next-Gen Leaders Value

Gen X
- Structure
- Diversity
- Autonomy

Millennials
- Vision
- Results
- Authenticity
- Entrepreneurship
- Participation
- Networking

Communication Channels

Gen X
- Phone
- Email

Millennials
- Social Media
- Text Platforms
- Face to face

Impacts

- Foundation mission change or re-interpretation
- Changes in engagement and decision process
- Proposal writing
- Building Trust
“How can we honor the legacy and vision of our founders (Spencer and Julie Penrose)? How can we provide initial seed funding to keep strategic initiatives moving forward? In some respects, that process is a bit like being a venture capital fund for nonprofits.”

Matt Carpenter, CFO
The El Pomar Foundation
Colorado Springs Gazette, 3/9/19

Engagement and Decision

First Stage: Evaluation
Follow up to assess interest/progress
Respond with additional information if requested

Second Stage: Discovery
Appointment
Refine proposal if requested

Decision
If awarded, acknowledge and manage the grant and prepare for renewal
If declined, engage funder to learn if future engagement is possible

Proposal Writing

“Less about education and more about entrepreneurship”
The ability to demonstrate impact
What it means to an end user (storytelling)
Learn to love haiku
Building Trust

1. Understanding relevance of your work
2. Seeing a plan
3. Understanding your value
4. Having trusted partners
5. Having a voice where significant investment is involved

Engagement Strategies

- Direct Contact
- Funder Briefings
- Partnering
- Thought Leadership

Tools You Can Use