

GWP 2020 Roadmap

How We Got Here

Grantmakers of Western Pennsylvania's mission is "to promote excellence in philanthropy – supporting an effective, growing philanthropic community that strengthens our region." However, trends in society and achieving social good are forcing GWP and its peers to rethink our definitions of "philanthropic community," "excellence in philanthropy," and how "philanthropy strengthens a region." For example:

- GWP's [26-county service area](#) will see more than [\\$88 billion passed down](#) from Baby Boomers in the next 10 years, with perhaps 30% going to charity. Increasing percentages of those charitable gifts are going to small family foundations and Donor-Advised Funds, and increasing percentages of those are choosing not to be endowed or place-based.
- The rising generations of wealth creators, inheritors, and philanthropic staff will be more diverse. They will favor helping causes over building institutions and will organize themselves in ways that don't look like traditional membership associations or nonprofits.
- Businesses, funders, and philanthropists are using a wider array of tools to accomplish social good. Some tools – impact investing, crowdfunding, gifts to advocacy organizations, use of corporate purchasing power, and more – are growing at faster rates than tax-deductible giving.
- Elected officials at all levels are creating more proposals to limit charitable deductions, enforce PILOTs, regulate endowments, overturn donor privacy, and more. And public trust in the intentions of nonprofits, wealthy donors, and endowed institutions has been declining.

GWP's planning consultant talked with 35 funders, civic and business leaders, wealth advisors, and nonprofit leaders about those trends and more. He asked their perceptions of the region's evolving philanthropic landscape and how GWP could better serve the region. GWP's board participated in two strategy sessions to augment that information. GWP's board and staff distilled the recurring themes and roles into the recommendations below. They provide a platform for evolution over four years, ensuring your philanthropic service organization remains relevant and effective in the future.

Your Feedback and Next Steps

GWP is distributing this draft vision to its members and to others who participated in the planning process. We're excited about GWP's evolution in the next years and we want to hear from you. Board members will be reaching out to peer members for individual feedback in the coming months. And, we invite your feedback through:

- 1) Open conference calls on **10/21/16, 12:00- 1:00 PM** and **10/25/16, 9:00 – 10:00 AM** with Barb Taylor, planning consultant Tony Macklin, and board members.
- 2) Brown bag lunch roundtable with Barb Taylor and board members from **12:00 – 1:00 PM on 10/26/2016**.
- 3) Calling or emailing Barb **by October 26** at (412) 471-6488 or btaylor@gwpa.org

The board will meet on October 28 to discuss the feedback we receive and create a final draft of a 2020 Roadmap to share with members at the December 5 Annual Meeting.

GWP in 2020 – Key Recommendations

1. Serve the Broader Philanthropic Community

GWP's core membership will continue to be the region's grantmaking institutions: its private, community and corporate foundations; corporate giving programs; and grantmaking public charities. But to succeed in the future, we need to represent, engage, and serve the broader philanthropic community adjacent to that core. Like many of our peers, we will become a welcoming home for any donor/investor, business, or institution committed to effective philanthropy in our region. We'll do this through a new brand, new membership categories, and new services and roles.

Benefits – Our discussions of philanthropy will include a more diverse array of voices, approaches, and perspectives. A broader base of stakeholders will diversify membership income and provide a more powerful voice for philanthropy across the region.

2. Evolve our Core Roles

By 2020, GWP will organize its staff, contractors, volunteers, and other resources around four interconnected roles. The annual mix of resources dedicated to each role will evolve through a combination of meeting market demand and strategic intent.

A. Communications and Knowledge Transfer – Creating timely, actionable knowledge from information residing in GWP, in members, in the networks described below, and/or in local and national partners. Functions include databases, information collections, organizational evaluation, communications, public storytelling, research projects, and creation of reports and other tools. Some of the projects may provide earned income.

Benefits – More proactive interpretation, packaging, and distribution of knowledge, sometimes segmented by type of member. Conscious connection of funders and donors of all types to effective ideas.

B. Facilitating Learning – Identifying and supporting peer groups based on geography, issue, and/or identity or function. Groups will launch based on the will of one or two volunteer leaders to engage their peers, and then close when there is no volunteer energy. Each group will choose an operating model (e.g. roundtable, community of practice, network) and one of two primary purposes: learning and sharing (improving knowledge, skills, practices, and relationships of their participants), or impact and innovation (developing and acting on shared solutions to challenges and opportunities). The groups will become a key driver of larger-scale education programs and we'll actively seek ways to translate their work to other audiences. We'll continue to host a few education programs that aren't connected to the groups.

Benefits – A more vibrant “network of networks” of engaged members and community partners across GWP's 26 counties. More effective use of GWP's limited staff through a clear package of options.

C. Voice of Philanthropy – Ensuring that the general public and public officials support a philanthropic community that is effective, innovative, and free to choose how and where it uses its resources. And, helping civic leadership and community problem-solving initiatives across the region understand the range of philanthropic solutions that could be useful. We will shift more time into proactive relationship building to, as we heard in the planning process, help members get out ahead of problems and co-develop solutions. Over time, our staff will become a trusted resource across the region for civic leadership initiatives, collaboratives, elected officials, the media, and more.

Benefits – Increased public awareness of, and trust in, organized philanthropy, leading to diminished public policy threats. Better forecasting of the impact on philanthropy of key challenges (e.g. a state budget crisis). Increased creativity and effectiveness in the use of philanthropic capital to solve complex challenges.

D. Organizational Stewardship – Sustaining the health of, and growing the capacity of, GWP’s human capital (paid and volunteer), financial capital, and reputational capital. Functions include governance and HR, member recruitment and retention, member and partner satisfaction, and budgeting and business model management.

3. Explore a Statewide Public Policy Partnership

The Council on Foundations, some community foundations, PANO, and others have been discussing a statewide public policy network that could proactively work on philanthropic and nonprofit issues. GWP’s staff and board will play an active role in the development of that partnership, and actively connect our region’s philanthropic community to its work.

2017 and 2018: Our R&D, Prototyping, & Capacity Building Phase

To start the evolution of GWP’s services and roles, the board and staff are recommending the following action items for 2017 and 2018:

1. Serve the Broader Philanthropic Community

New membership model* – Develop new membership criteria for regranteeing organizations, government agencies, giving circles, professional advisors, and individual donors/investors. Explore simplifying the membership levels and/or offering something like a “basic” and “premiere” package of services. Many of GWP’s peers across the country have expanded their membership bases and we’ll ask their guidance on the process. In one of our 26 counties, Allegheny County, we’ll work with The Pittsburgh Foundation’s Center for Philanthropy to co-develop some education services or other activities.

New identity* – A new organizational name and branding will reflect trends in philanthropic work beyond grants and our expanded connective, network role. Many of GWP’s peers have been through a similar process and use phrases such as “philanthropy alliance” and “philanthropic network.”

2A. Knowledge Transfer & Communications Role

Issue briefs – Develop short guides that help wealthy donors and smaller foundations navigate an issue and how to effectively give and invest in solutions. Initial guides could connect to timely topics (e.g. equity or transportation) or with a funder peer group (e.g. food access and quality). GWP could distribute them through partners such as community foundations, wealth management offices, and business alliances.

Philanthropy story series – Create a series of stories, visuals, and “story starters” about the impact of philanthropy and philanthropists on the region. We’ll publish these through GWP’s communications channels and offer them to groups such as estate planning councils, chambers of commerce, bloggers, and other connectors.

2B. Network of Networks Role

Packaged facilitation and learning services – Develop a formal package of options for types of groups, commitment of staff resources, and expectations of group leaders and members. The package would define the support provided as part of membership benefits and define a set of for-fee services such as group site visits, larger forums, or bus tours for trustees.

Regional service – Actively invite and facilitate new peer groups serving philanthropic organizations outside of Allegheny County, starting with community foundations. (These may be a “loss leader” in the first year.)

Special Event series* – A series of events and peer group discussions about a selected theme. The first example might be equity, racism, and inclusion, based on similar projects in Minnesota and D.C. (“Putting Racism on the Table”). Such a series would help members’ board and staff understand and deal with unconscious and systemic biases embedded in philanthropy, nonprofits, and other institutions. And it could spur new capacity building and grantmaking programs and practices.

2C. Voice of Philanthropy

Relationship building – Meet with business and entrepreneur groups, leadership initiatives, and other community problem-solving initiatives across the region to better define how GWP and philanthropic investments at different levels could support their work.

** The board will recommend the use of some of GWP’s reserves for these items when one-time capacity grants aren’t available.*