

COVID-19 response: Lessons learned and next steps

Recently PEAK Grantmaking and Candid teamed up on a Community Conversation as part of an ongoing PEAK series designed to provide a forum for peer learning and knowledge exchange on COVID-19 response practices. Melissa Sines, programs and knowledge director for PEAK Grantmaking, and Janet Camarena, director of Candid learning, hosted the session at the end of April, to invite grants management professionals to reflect on what they are learning from changes made to streamline grants processes that may inform how they hope to improve overall practices post-pandemic. Here we share highlights of the takeaways from the session.

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Candid (CNDD)

Stakeholder(s):

Melissa Sines :

Co-Author - Programs and Knowledge Director, PEAK Grantmaking — Melissa Sines is programs and knowledge director at PEAK Grantmaking. This position leads PEAK Grantmaking's work to identify effective, efficient, and equitable philanthropic practices and advocate for their adoption by grantmakers. This role combines two important functions: Developing strong strategies and partnerships in order to raise awareness of our practice work and increase our impact in the sector and to develop our knowledge base of the current and changing state of practice in the field. Melissa started at PEAK Grantmaking as the effective practices program manager in 2018. Prior to joining PEAK Grantmaking, Melissa was the education and accreditation director at Maryland Nonprofits and the Standards for Excellence Institute, where she oversaw nonprofit accreditation and the association's learning community. Melissa is currently a board member at the Maryland Center for Economic Policy and on the advisory board for the Business and Economic Department at the Notre Dame of Maryland University. She also serves as co-chair for the United Philanthropy Forum's Program Committee and on the Funder's Planning Committee for the Frederick County Nonprofit Summit. She has served on committees for Independent Sector, the Association of Baltimore Area Grantmakers, the Frederick Giving Project, and numerous other nonprofits in her local community. She received her MPA from the University of Baltimore and her BA from Hood College. Melissa is a self-professed nonprofit dork and accidental techie. She is passionate about organizing people and projects to promote social justice.

Janet Camarena :

Co-Author - Director of Candid Learning — Janet leads the integration and oversight of Candid's various learning platforms, including curriculum design and the development of learning tools and content on GrantCraft and GlassPockets. She previously served as the director of transparency initiatives for Foundation Center, working to champion greater foundation transparency and openness in the field of philanthropy. A key part of her role is to provide leadership for Glasspockets.org, which she helped to found and build in 2010. Glasspockets provides a variety of tools and features designed to encourage philanthropic openness. It has been recognized by the Webby Awards and was also selected as one of the Top 100 websites by PC Magazine. Previously, Janet also served as director of Foundation Center's regional office in San Francisco for 15 years. She led a team of six professionals in delivering extensive

outreach and capacity building services throughout the Western United States, planning and overseeing training for social sector audiences, carrying out donor development and cultivation, and producing live and online programming such as the popular Meet the Grantmakers and Philanthropy Chat podcast series. Janet was among 48 nonprofit leaders selected for the American Express Nonprofit Leadership Academy. She completed her undergraduate work at Mills College and received a master's degree in library and information science from San Jose State University. She serves on the boards of PEAK Grantmaking and Community Initiatives, a fiscal sponsorship provider, and also volunteers by teaching art at her children's elementary school.

Funders :

In applications: There is increased attention to the labor standard foundation applications require, greater scrutiny on which information is really needed in order for funders to make decisions, and questioning whether the work of collecting that information should fall to the grantee or to the funder. Some funders have started taking on more of the due-diligence burden, using a variety of sources readily available to them, such as organization information already available in their own databases; grantee websites; and websites like Candid's GuideStar profiles to find the information they need. They're also taking applications via phone—asking questions of the grantee verbally and recording answers in their grants management system. Some are also taking applications created for another funder or banding together in funder collaboratives to agree on one application and one report format and submission for emergency response grants. As one funder put it, they are "short on what we ask from the nonprofit—long on us documenting what we know about the nonprofit."

Grantmakers :

In decision making: Grantmakers are convening decision-making bodies (staff, boards, grant review committees) in creative ways. Online meeting software is being utilized to convene decision makers, work through decisions, and rapidly deploy funds. Detailed grant summaries and packages are being reduced to quick emails and spreadsheet overviews that actively prompt in-depth questions and discussions that engage decision makers in meaningful work and promote good decisions. These quick meetings in virtual environments could be a great way to democratize the grantmaking process by utilizing a more participatory grantmaking structure.

Mission

To facilitate peer learning and knowledge exchange on COVID-19 response practices.

Values

Transparency: More transparency and communication -- Program participants report that they are adopting streamlined and flexible workflows, which are freeing them up to be more available to connect with grantees. During phone calls to check in on needs and progress, stronger relationships are being forged, leading to greater empathy and understanding about which adjustments might be most helpful. For example, many funders have started to repurpose existing project grants to unrestricted support, as well as to allocate a larger portion of their overall budgets to general support.

Communication

Streamlining: Streamlined and flexible workflows -- As the world continues to adjust to the ongoing strains of sheltering in place and the stress of the extended public health and economic crisis, philanthropy is beginning to understand how its own practices can help or hurt the situation. And the burden you lift may be your own, as several participants reminded us that streamlined application and reporting processes and workflow shortcuts are reducing burden not only for nonprofit partners but also for grantmaking staff.

Flexibility

Efficiency: In agreements and payments: As one of our participants declared: “We moved to electronic checks and electronic award letters and we are NEVER going back!” For many grantmakers, this crisis has led them to embrace electronic processing in place of printing and mailing agreements and checks. One funder reported that they had been advocating for wire payments for a year and a half, and now as a result of the crisis they had it up and running within a few weeks. Award letters, grant agreements, and grant modifications are all being accepted in simplified formats such as a short email, electronic signature software, or a phone call. Another funder reported that using electronic signature software had resulted in over half of signed grant agreements being returned within 30 minutes.

Reporting: In reporting: On the reporting side, funders are accepting quick updates via email or phone, extending reporting deadlines for interim and final reports, even suspending reporting altogether. Some are adjusting evaluation plans and reducing report requirements. Education funders are realizing they will need to entirely rethink evaluation for their grantees given the disruption in that part of the sector.

1. Applications, Reporting & Relationships

Streamline applications and reporting processes and use conversation to build stronger relationships with your grantees.

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2. Information Usage

Closely examine all pieces of information that you ask of applicants to make sure you are using this information.

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3. Due Diligence

Take on more of the burden of doing the homework and due diligence about your grantees.

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4. Standardized Applications

Consider eliminating the use of customized narrative and budget templates and encouraging applicants to submit applications used for other funders.

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5. Online Applications

Move to mobile-friendly, accessible, online applications if you haven't previously, and make accommodations for people with disabilities.

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6. Agreements, Payments & Reports

Take the leap and go electronic for grant agreements, payments, and reports.

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7. Operating Support

Change mindset on general operating support by increasing its frequency of use.

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8. Participatory Grantmaking

Consider the role of participatory grantmaking in how philanthropy might shift the power now to traditionally under-served and under-represented groups.

Stakeholder(s)

Under-Served Groups

Under-Represented Groups

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9. Data Requirements

Reconsider evaluation and data requirements and remove requirements for advertising or brand opportunities that require a certain threshold of participation.

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10. Metrics & Decision-Making

Consider which metrics and decision-making frameworks should be used to guide decision making now, and whether you can use an equity or values-based framework to make better decisions.

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11. Documentation

Remember, operationalizing and standardizing all of the changes is a lot of work, so write down how you're making decisions and why you're making specific decisions.

It's not easy, but it will help you document changes for your board and for the auditors.

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12. Framing

Engage in pilots and iterative change.

Change can be intimidating and you may likely encounter resistance. So make the case that this is a pilot or part of iterative change, and it can always be changed back or changed again in the future if it's not working. Framing in this way can help get the experiment going.

Administrative Information

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