

How to Create Your Own Grantmaking Focus

A grantmaking focus is a statement of a foundation's goals. It is a sentence or two that guides the work of the foundation, and also informs grantseekers who wish to approach your foundation. Creating a grantmaking focus is the first step toward more strategic grantmaking.

The statement of focus should indicate

- what the foundation hopes to achieve
- where (geographically) it wants to have impact
- who should benefit

After a focus is determined, a foundation generally develops strategies that define how the goals will be accomplished.

Why Focus Your Grantmaking?

Clear Communication

- You will be able to communicate clearly what your foundation funds
- You will become recognized for your work, and potential grantees will approach you with solid proposals

Increased knowledge

- You can make "smarter" grants in your area(s) of focus as you become more knowledgeable through reading grant proposals and making site visits
- You will know which conferences to attend and which grantmaker affinity groups are for you

Easier Decisionmaking

- You will have criteria to determine which funding requests to screen out and which to consider
- Your due diligence and assessment of grant requests will be easier
- You may receive fewer requests for funding (less paper work) if all grants are focused and guidelines are published

Enhanced Sense of Purpose

- You can create a body of work that will grow and give you a sense of purpose, accomplishment, and greater impact in your community
- Your focus may help build unity among board members, as well as pride and satisfaction with the foundation's progress

Steps for Achieving Consensus on a Focus for Grantmaking

Groundwork

1. Before you begin a process with your Board to determine a focus for grantmaking
 - Take a realistic look at your Board. This suggested process requires that all trustees are full participants in decision-making.
 - Identify a fair, neutral, unbiased person (or persons) to facilitate the process.
 - Keep in mind that each foundation board is unique. This process is a “blueprint” for creating a grantmaking focus. However, you may want to adapt some parts to assure the process fits your foundation.
2. Begin with your Board determining together
 - That a focus is desired
 - How much of the grantmaking should be focused (all or a portion)
 - The process you will be using for deciding a focus
 - The ground rules for the process (all ideas are valued and respected, etc.)
 - What “consensus” will mean (all must agree, majority vote, 2/3 vote?)

Research and Assessment

3. Research and chart by category your foundation’s past grantmaking. Determine if there are any themes in the history of your grantmaking.
4. Talk with each Trustee to learn
 - His/her personal philanthropic and community interests
 - His/her favorite foundation grants and why
 - His/her hopes and vision for the foundation 3 to 5 years from now
 - His/her beliefs about important grantmaking priorities for the foundation
 - His/her special strengths or knowledge that could enhance the foundation’s grantmaking
5. Chart the results of findings from Trustee interviews and look for themes, overlaps, opportunities, and possible areas of focus.

Presentation and Discussion of Findings

6. Present to your board both a summary of the findings from the interviews, as well as your grant history. (Be sure to include the range of ideas from each Trustee interview.)
 - Discuss optional areas of focus, making sure all Trustees “weigh in”
(which would be easiest for the foundation? which could have the most impact?)
 - Could two or three areas be brought together? *(an interest in youth and an interest in environment, an interest in art and in interest in older people, etc.)*
 - Consider what would help all Trustees be comfortable with focus areas of most interest

Achievement of Consensus

7. Remind Trustees of decisions in # 2 above
8. Use one or more of the following techniques:
 - Ask each person to state their preferred focus for grantmaking and provide his/her rationale. Then ask everyone to discuss the advantages and disadvantages of each suggested focus. Negotiate.
 - List optional focus areas to be considered and ask each to rank them in order of preference. Tally scores to determine top 2-3 and discuss advantages and disadvantages of each. Negotiate.
 - Ask each Trustee to select 2 from a list of optional focus areas. (This list should have 5-10 optional areas of focus.) Determine which optional areas most people selected. Discuss them and negotiate.
9. Formally decide on 1-2 focus areas using the process appropriate for your foundation.

Implementation

Refine your thinking

10. Research your new focus area to identify opportunities for impact and gaps in funding, looking for ways your foundation can create its own niche and use its grant dollars most effectively.
11. Consider inviting experts or leaders in the focus area you have selected to meet with the Board for educational purposes. (Experts may be leaders in the field as well as from other foundations having experience in your new focus area.)

Apply your decision

12. Update public information on your foundation
 - Revise your guidelines, printed materials, and website to reflect your focus
 - Incorporate a statement of your focus area(s) into routine correspondence
13. As you consider requests for funding, assess how each relates to the focus (Consider scoring each grant against the focus area.)

Evaluate and Adjust

14. Determine when your foundation should assess how it is doing and what it is learning from its work in its new area of focus.