



*National Network of
Consultants to Grantmakers*

A TIDES CENTER PROJECT



Lisa McGill

Moderator
NNCG Project Advisor

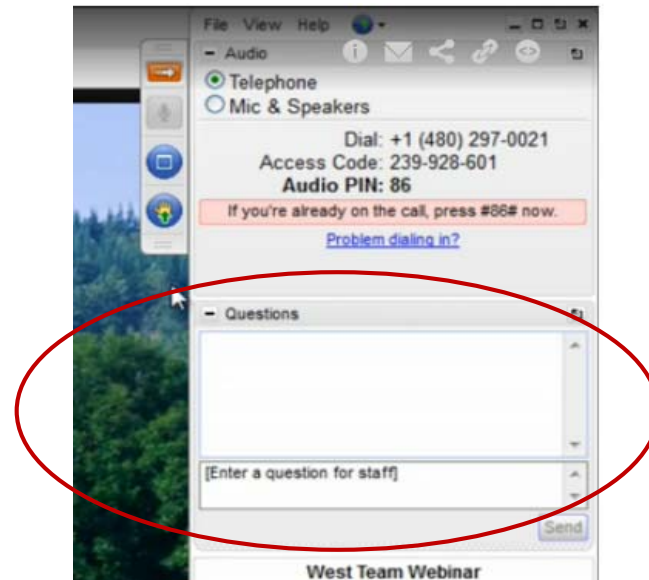


Lori Jolliffe

NNCG Webinar Coordinator

SUBMIT YOUR QUESTIONS

- Questions can be submitted or asked at anytime during our broadcast, although we may not get to them right away
- Written questions can be typed into the Questions box in your control panel





A CONVERSATION WITH CAROL LARSON, PAST PRESIDENT AND CEO, THE DAVID AND LUCILE
PACKARD FOUNDATION

NATIONAL NETWORK OF CONSULTANTS TO GRANTMAKERS | MAY 21, 2020

TODAY'S PRESENTERS



Carol S. Larson
*Former President and CEO
The David and Lucile Packard
Foundation*



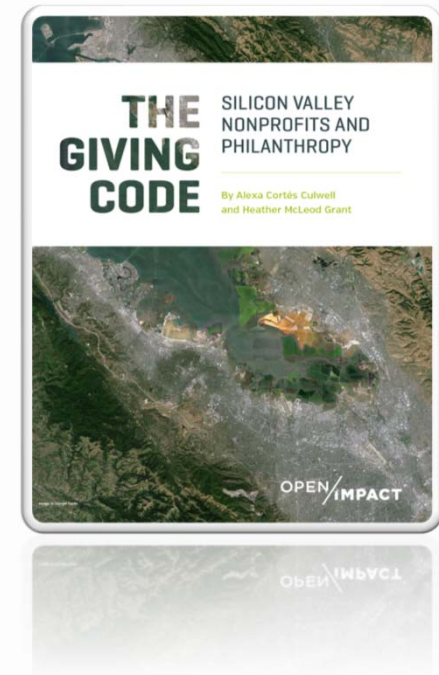
Irene M. Wong
*Director of Local Grantmaking
The David and Lucile Packard
Foundation*



Alexa Cortes Culwell
*Co-Founder
Open Impact*

TODAY'S PRESENTATION

- ✎ Learn about a collaboration that was guided by a creative consultant working in synch with Foundation leadership;
- ✎ Understand how this work continues to spur connection of philanthropists to community issues and giving;
- ✎ Spur thinking about your own consulting work, how you might co-create projects that encourage grantmakers to give where you live.



<https://www.openimpact.io/giving-code>

DAVID AND LUCILE PACKARD: A LEGACY OF CHANGE

- ✿ Technology pioneer and devoted community volunteer who were always engaged in community
- ✿ Formalized their philanthropy in 1964 establishing the David and Lucile Packard Foundation
- ✿ Enduring Values have guided the Foundation's work
- ✿ Values shaped tenure as CEO



Hewlett Packard Co.
"Garage" Birthplace of
Silicon Valley

Packard Foundation's CA
LEED Platinum Net-Zero
Energy Headquarters

Lucile Packard Children's
Hospital—1986 and Today

LEADING A COMPLEX GLOBAL FAMILY FOUNDATION

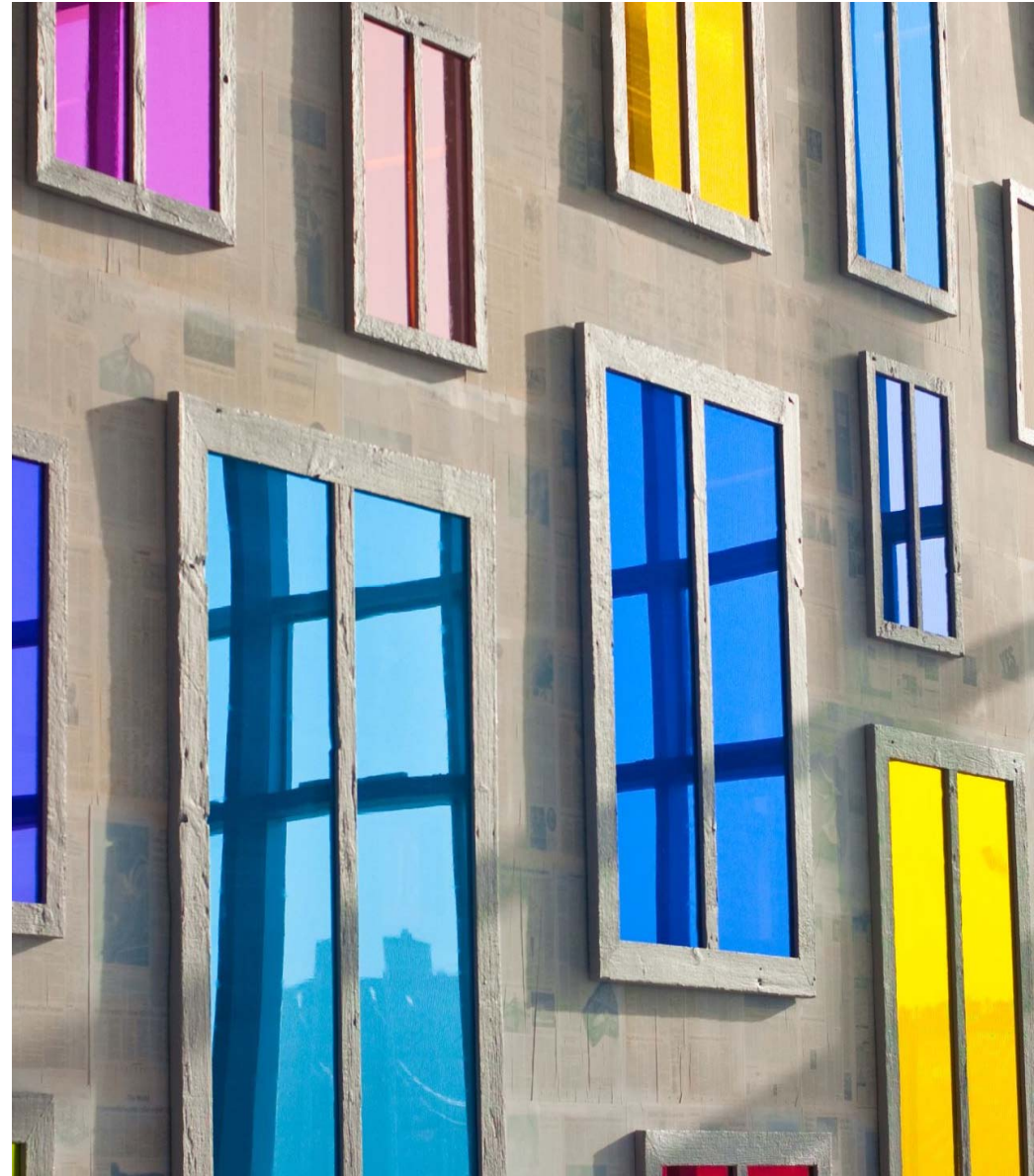
PACKARD FDN. LOCAL GEOGRAPHIC FOCUS



- ✿ Balanced commitment to local communities with growing national and international grantmaking
- ✿ Why?; Belief that a vibrant nonprofit sector is essential to community well-being; desire to give back; commitment to learning
- ✿ Created a dedicated Local Grantmaking Program with strong leader and team
- ✿ Elevated Foundation's presence and financial commitment to local community alongside global investments

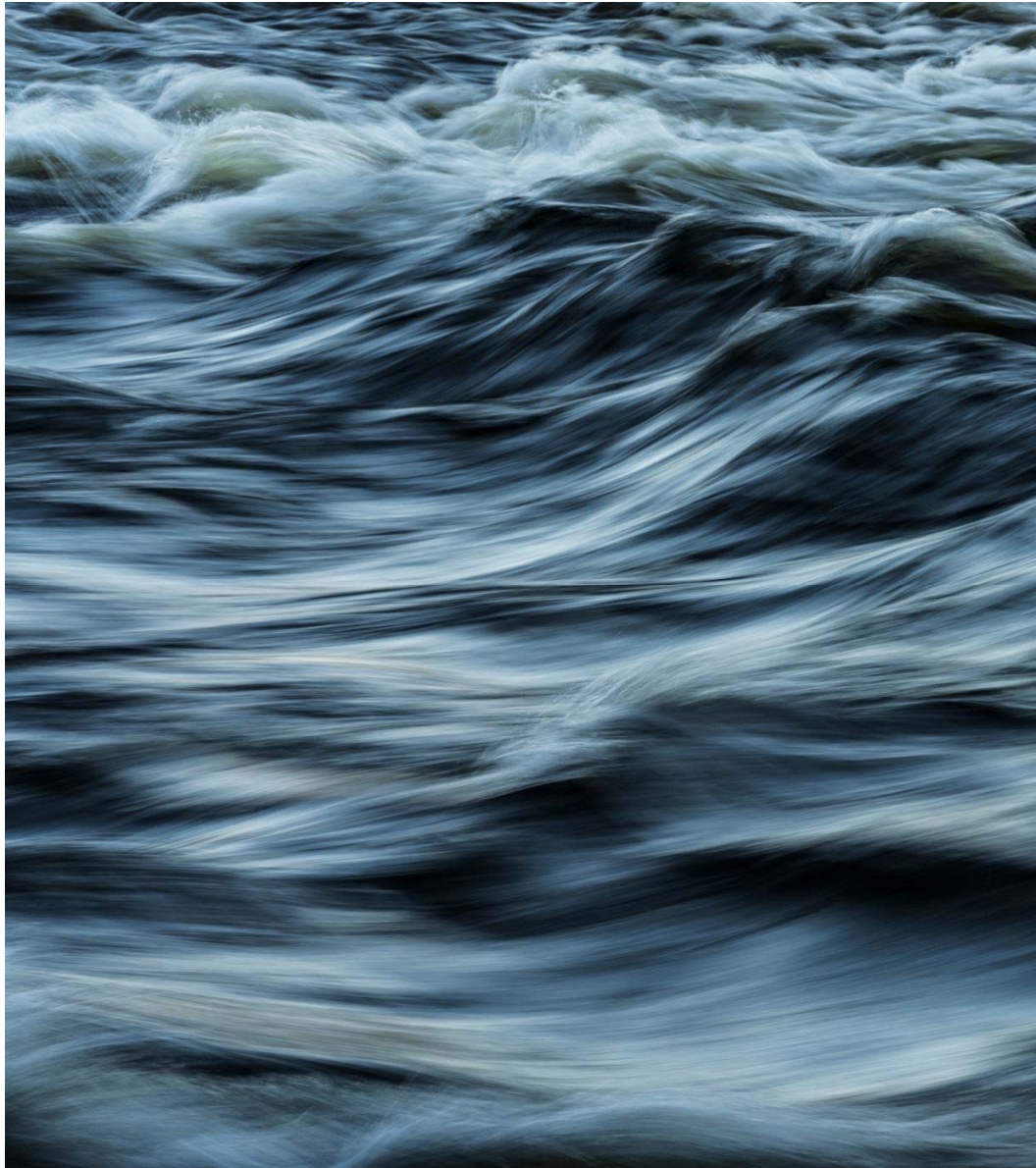
PREQUEL TO THE GIVING CODE

- ✿ Operationalizing the Foundation's value of Commitment to Effectiveness; a five-year review of work
- ✿ Limited bandwidth and a need for objective information; need for expert consultant
- ✿ Deliverables included scan of best practices and benchmarking on local philanthropy; engagement ends and the relationship begins



THE PERFECT STORM ARRIVES

- ✧ Silicon Valley's economy is thriving; Philanthropy is also experiencing an upswing
- ✧ Community-based organizations not experiencing growth in philanthropy; challenged to connect with new "tech" donors
- ✧ Cost of living is increasing; demand at community-based organizations is escalating. Economically challenged find it hard to make ends meet.





DEVELOPING UNDERSTANDING AND BUILDING AWARENESS

- ✿ Silicon Valley donors are global citizens; reflected in their philanthropy creating challenges to local philanthropy
- ✿ Need for independent research and data to provide further understanding of issue
- ✿ Local giving was part of Packard DNA necessitating Foundation to lead from behind

THE ROAD TO ENGAGEMENT

- ✿ New consultancy just setting out on our journey
- ✿ Initial project focused on understanding local giving; this grew into a much longer journey and a distinctive body of work for our firm
- ✿ Feedback and demand from initial work fueled joint exploration and ideation on next phase, which became a more ambitious project—The Giving Code report





BUILDING THE NETWORK

- ✧ Research questions required both quantitative and qualitative community level data, which was hard to get so we had to be creative
- ✧ A broad group of stakeholders came together to share data or give us access to focus groups of nonprofit leaders and donors
- ✧ The stakeholder group became sponsors of the report, champions for its message and ignited various initiatives focused on solutions

GIVING CODE RESULTS

- ✿ Report raises visibility of disparities between philanthropy and community-based organizations locally—and nationally
- ✿ Empowers and arms community with data and a shared understanding of the problem/solution
- ✿ OI facilitates follow-up community conversations; more leaders step up; new initiatives form to focus on solutions



<https://www.openimpact.io/giving-code>

GIVING CODE RESULTS CONT'D.

- ✿ Magnify Community created; local giving pledge launched; facilitating pledgers to come together in the wake of COVID-19
- ✿ Offshoots of collaboration; Packard Foundation and Heising Simons Foundation launch learning and experimentation grants
- ✿ Packard OI team continues iteration and partnership



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REFLECTIONS



Foundation Program Strategy:

- Essential to bring data to illuminate issues; critical to engage outside independent partner
- Remain flexible with consulting resources
- Build relationships with consultants as external “thought partners”



Consultants:

- Go beyond transactional work
- Iterate work and create ongoing value for the client and issues you both care about
- Co-creation is critical; invest time in building broad network and creating a “big tent”



Photo Credit: LGP Grantee Vida Verde

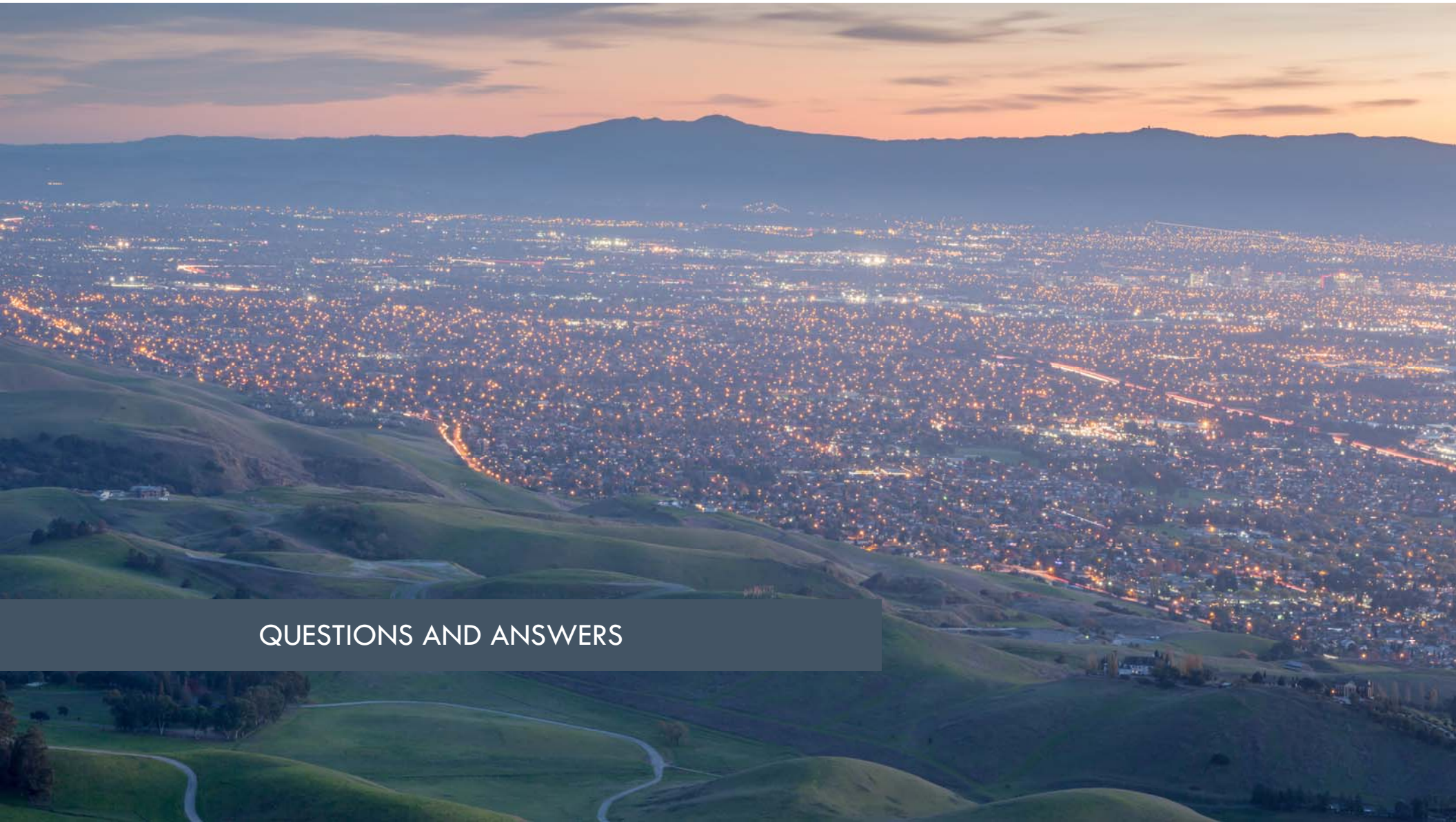
CLOSING REFLECTIONS

🌱 Giving Code:

- Barriers to local giving are challenging to identify
- Broad solutions can be difficult to apply since philanthropy is uniquely personal
- To tap into one's philanthropy, bring data and build personal relationships
- Family and board commitments, and voice are significant levers for encouraging others to give locally
- Portfolio that includes a local commitment can enrich every philanthropist's giving



Photo Credit: Jeremy Bitterman



QUESTIONS AND ANSWERS

UPCOMING EVENTS



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Catalyzing Change with a DEI Lens

June 8, 2020 — 1:00 - 2:00 PM Eastern

Collective Impact: Where is it now?

June 9, 2020 — 12:00 PM Eastern

Global Trends in Philanthropy Ecosystem

August 6, 2020 — 12:00 PM Eastern

How to Help your Clients Connect their Grantmaking Purpose to their Measurement and Evaluation Efforts

September 15, 2020 — 12:00 - 1:00 PM Eastern

Generation Impact: An inside look with the authors into their updated edition

November 4, 2020 — 1:00 - 2:00 PM Eastern

Working with Grantmakers to Build the Capacity of Their Nonprofit Partners

December 8, 2020 — 3:00 PM Eastern

For a complete list of upcoming events, visit www.nncg.org

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For information about the Giving Code: Silicon Valley Nonprofit and Philanthropy, the report is available for download at Open Impact's website:
www.openimpact.io

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