

# 8

“They say we can always reach out, but don’t offer concrete opportunities or office hours.”

“I appreciate the signal boosting to share our story with a wider audience.”

## INSIGHT

**Grantees are interested in and looking for portfolio support, and would like more clarity, autonomy, and choice in how they access and receive that support.**

Grantees have many organizational health needs that can be met by connecting them with the right resources, such as other organizations, consultants, services, mentors or vendors. However, it is important that the process for accessing this support and the context in which it is provided is clear, to avoid it being seen as punitive.

“We felt like [GCE employee] did not represent our interests, they represented [GCE’s] interests.”

“More than anything, we need [GCE] to help us find and hire talent.”

## Insights

Participants expressed interest in the following portfolio support <sup>6</sup> areas:

- **Recruiting and hiring:** Growth and scaling were important concerns for many of the respondents, and in some cases “growth” was understood to mean hiring people to help meet metrics. Grantees see a need for active recruiting and hiring support.
- **Financial management:** Both survey respondents and interview participants strongly agreed that GCE had expertise in financial management.
- **Fundraising:** 88% of survey respondents indicated that fundraising support was extremely desirable.
- **Networking, outreach and community development:** Interview participants appreciated the sense of belonging that came from attending GCE gatherings and viewed access to other grantees as valuable. They also appreciated when GCE helped to expand their reach, e.g., on social media by “signal boosting” or promoting their work.
- **Evaluation and audits:** Organizations that have undergone an evaluation or audit generally reported positive experiences.

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<sup>6</sup> Portfolio support refers to specifically earmarked support, above and beyond grant funding, to build organizational capacity and resilience. Examples include executive coaching, fundraising support, digital security trainings, or diversity, equity and inclusion (DEI) reviews.

“We accepted [GCE employee] on our board because we like and trust them.”

“No. We don’t want them on a board. I’m not sure it makes sense to have the org. giving the money supervising how it’s spent. Isn’t that a conflict of interest?”

Knowing that this kind of additional support existed wasn’t enough for organizations to feel that GCE was meeting their specific needs, because there was no framework for taking advantage of the offers.

Some participants expressed concerns about accepting alternative portfolio support from GCE, due to the power difference inherent in the funding relationship and the implications of admitting weakness to a funder. Their concerns ranged from not being able to pick or change who the service provider is to wondering if the service provider would “spy” on them and report weaknesses to GCE.

These concerns were tied to participants not having clarity about why support was being offered and to what end – was it because GCE was keen to help proactively build organizational capacity, or was it because they were performing badly and GCE was intervening? This concern may indicate a lack of underlying trust; some participants indicated that they could not be sure that GCE had their best interests in mind, and therefore were hesitant to share challenges or accept support.

In the past, GCE ILs have provided portfolio support by taking seats on select grantees’ boards. This is a unique practice in the non-profit funding sector, and was generally met with skepticism. Over one-third of survey respondents believed that the practice of GCE holding board seats was not at all helpful for their organization. Their reasons included fear of sharing internal problems with a funder present, power or knowledge asymmetry, negative perceptions by third parties of having a funder on the board, and concerns that representing GCE’s interests would take priority over acting in the grantee’s best interest. There was a qualitative difference in the sentiments of those observing the practice of GCE taking board seats and those

experiencing it. Survey respondents who had a member of GCE staff on their board, viewed this participation more positively than those respondents who didn't.

There was a positive correlation between GCE's participation on an organization's board and that organization's perception of the ease of communication with GCE. Leaders of organizations with a board member or observer felt much more comfortable asking for help, implying a closer relationship and more open channels of communication.

What most organizations appreciated from board members was strategic advice, operational support, and connections to the ecosystem.

**THEMES**

- > Funding Approach & Process
- > Trust & Power

# Recommendations

The following are recommended steps for increasing the quality of, and clarity around, portfolio support offered to grantees:

- Clarify what alternative types of portfolio support is available to grantees, why it is being offered, and particularly how this support is intended to help achieve the organization's goals.
- Give grantees more autonomy and choice when taking advantage of additional portfolio support e.g., by giving them ownership over who to work with and under what terms. Have clear guidelines around privacy and NDAs with the vendors.
- Look for opportunities to model transparency and honesty in communications with grantees. Greater transparency from funders around their own challenges and failures will help grantees by reinforcing that their experiences are normal, expected, and worthy of support, and will facilitate a more productive and beneficial funding relationship for both parties.
- Explore alternative and more flexible models for portfolio support, as opposed to taking board seats as a funder, e.g., create opportunities for grantees to support each other through board participation with careful consideration for possible conflicts of interest and power dynamics, or for leaders of grantee organizations to pursue professional development.
- Consider providing strategic and financial planning support, particularly focused on the post-funding phase.