



# Smarter Outsourcing *for* Grantmakers

- Why Do Grantmakers Outsource?
- What Functions Do Grantmakers Outsource?
- Potential Pitfalls of Outsourcing

Foundations have long been thought immune to fluctuations in the economy. After all, they are often established in perpetuity, usually have assets that are the envy of many a public charity, and make their payout based on rolling averages. However, by late 2008 in the face of a major recession, it became clear that funders had suffered economic repercussions and were going to have to tighten their purse strings along with their grantees. Foundation assets had dropped—in some cases by one-third or more—while at the same time, funders were committed to payout based, in part, on the much higher level of assets they held during better economic times. For the first time in recent memory, TCC Group witnessed some foundations making dramatic cuts to their expense budgets in order to continue their grantmaking. Funders began looking at many options to save money, among them staff layoffs and a reduction of overhead costs such as office space.

Private companies have long outsourced in order to save time and money. During periods of economic growth over the past decade, funders of all types also began to use outsourcing more

frequently as staff workloads grew in proportion to increased grantmaking budgets. Tasks such as conducting needs assessments, reviewing proposals, conducting site visits, monitoring grants, and creating evaluation systems were increasingly given to outside contractors, consulting firms, and independent consultants, in the belief that these external specialists could do the work more efficiently and effectively than the foundation could itself. These years also saw a growth in firms providing complete “back-office” services to smaller foundations, as many boards began to show a desire to focus on grantmaking strategy rather than administration.

With the subsequent downturn in the economy, outsourcing became an even more attractive option for some funders. Today, more than ever, grantmakers facing fluctuations in the economy need to work more resourcefully, efficiently and effectively. This paper will explore **why** grantmakers choose to outsource, **what** functions are typically contracted out, and **how** an outsourcing arrangement is best managed, based on the lessons TCC Group—and our clients—have learned over the past 30 years.

A funder with few or no staff may find that outsourcing most or all of its administrative, grantmaking, and finance functions allows it to save significantly on overhead.

## Why Do Grantmakers Outsource?

There are a number of factors determining a funder's decision to outsource its work. A small family foundation may only require occasional outside help, while a large corporate foundation may want someone on retainer to provide ongoing, field-specific expertise in a particular area of focus. A private foundation funding nationally may need to tap the community-specific knowledge of a local consultant, while a community foundation may want a consultant with a national reputation to add credibility to its work. Funders of all kinds might use contractors to take something "off the plate" of a busy program or evaluation officer until the foundation is ready to hire another full-time person.

Generally, grantmakers outsource for one or more of three main reasons: 1) to save **time and money**; 2) to **tap expertise** that is not available in-house; and 3) to **obtain objectivity**.

### Save Time and Money

Even in a healthy economic climate, funders may wish to increase the efficiency of their operations, and outsourcing can be an attractive option. In a booming economy, a foundation may find itself under pressure to make a large payout in a tight timeframe and may contract for extra human resources needed to make the necessary grants. This was the case for the Freeman Foundation, which chose to keep its staff small and use outside consultants to help monitor such long-term initiatives as its Asian Immigrant and Refugee Economic and Education Opportunity Program, which for ten years awarded grants to organizations working to increase the availability of English-language instruction and employment services to Southeast Asian immigrants and refugees. This approach allowed the Foundation to handle irregular workloads by using human resources, in this case from TCC Group, on a flexible "as needed" basis.

In a recession, foundations may need to reduce expenses across the board, from staffing costs to overhead. In mid-2009, for example,

several large foundations made headlines when they offered unprecedented voluntary severance to many of their employees. According to Bradford K. Smith, the President of the Foundation Center, "Foundations are resorting to job cuts after having adopted other cost-saving measures, like hiring freezes and reductions in benefits and travel budgets."<sup>1</sup> Also, while some funders may be cutting their average grant size to keep their grantmaking budget down, they are discovering that smaller grants do not necessarily translate to less work for staff. And some funders have actually *increased* grantmaking to help struggling grantees reeling from a combination of decreased revenues and increased demand for services.

In this environment, where the need to contain costs is high and workload may also be increasing, outsourcing provides an attractive option to funders. Foundations with lean staffs can often manage a cyclical, labor-intensive grantmaking process more cost-effectively by using an outside expert to help review numerous proposals during a short period of time. Likewise, a funder with few or no staff may find that outsourcing most or all of its administrative, grantmaking, and finance functions allows it to save significantly on overhead. A recent membership survey of the Association of Small Foundations found that respondents had an average of 2.54 staff persons and median base salaries ranging from \$50,000 to \$102,000,<sup>2</sup> demonstrating the potentially high costs of running a full-scale office. The survey also found that total operating and administrative expenses were consistently lower (45% lower on average) for foundations with no paid staff, even when the expenses included consultant fees.<sup>3</sup>

Many funders may be willing to consider outsourcing even if they have not previously hired consultants. A survey conducted by the National Center for Family Philanthropy of family foundations with assets between \$5 million and \$200 million found that a full 75% of respondents felt that current resources allowed for hiring outside professionals and consultants as needed.<sup>4</sup> There is increasing recognition that outside experts can not only save money that might be better put to use as grants, but can enable the funder to move quickly, do many things simultaneously, and free up time to focus on other important matters.





## Tap Expertise

Woodrow Wilson once noted, “I not only use all the brains I have, but all I can borrow.” Likewise, many grantmakers outsource functions for which they lack in-house expertise—for example, using an accounting firm to prepare and file the 990-PF return. Funders also use consultants to gain additional expertise related to the process or content of grantmaking and/or foundation governance. According to the Association of Small Foundations, half of the total foundation grant dollars in the United States comes from 60,000 small foundations<sup>5</sup>—those led entirely by volunteer boards or operated by just a few staff. This indicates that there may be a great need for outside expertise to help ensure these grant dollars are used wisely.

For example, a new corporate employee fund led by motivated but inexperienced volunteers or a start-up family foundation may consider seeking help from a consultant who is more knowledgeable about the grantmaking process. “When we lost 67 of our employees on September 11, 2001, we sought outside expert assistance to help quickly set up a Family Fund to provide for the needs of the victims’ families,” observes Andrew Senchak, President of the investment bank Keefe, Bruyette & Woods, which hired TCC Group to help administer its grantmaking after the tragedy. In other cases, consultants can provide specialized knowledge about evaluation or a certain programmatic field, such as cultural participation, community health, or youth services.

The growth of “capacity-building”—or providing technical assistance to grantees, often in cohorts—has also created outsourcing opportunities. An example of this is the Ford Foundation’s media program, which needed help to provide capacity-building expertise, targeted training, and hands-on support to many of its new grantees—start-up media content producers whose visionary leaders had deep knowledge of journalism and media, but little experience managing organizations. The resulting initiative, Sustainable Media Organizations, uses consultants from TCC Group to train grantees to generate revenue from contributed and earned income, develop their boards, and provide one-on-one coaching and a forum for self-directed peer exchange. “Sustainable Media Organizations has strengthened our grantees’ odds of success in a competitive nonprofit media market



and lessened their reliance on Ford as a predominant source of funding,” says Calvin Sims, Program Officer.

Evaluation is another important function that many funders can outsource. Evaluation can be used to assess funders’ grantmaking efforts as well as the programs of their grantees. Outside contractors can fill the evaluator role with both expertise and an objective viewpoint.

## Obtain Objectivity

Some funders contract out certain grantmaking functions in order to establish a neutral third party that can act as a buffer between the grantseeker and the grantmaker. Funders often hire consultants to play this intermediary role when they wish to maintain a low profile or need a fresh perspective. This may be particularly important in times of declining grantmaking resources and increased competition for grant monies.

Funder collaboratives may find it especially beneficial to outsource. In some collaborative situations, a consultant or neutral third party can play an important role, not just by helping to design and/or implement a program, but also by coordinating activities and communication within the group. For example, the Challenge Fund for Journalism, a joint initiative of the Ethics and Excellence in Journalism Foundation, the Ford Foundation, and the McCormick Foundation, chose to outsource the management of its program. TCC Group manages the application and grantmaking process, regrants on behalf of some of the funders, provides grantees with technical assistance and coaching to build their organizational and fundraising capacity, and monitors and evaluates results.

At other times, a grantmaker may use an outside advisor to provide objectivity when evaluating a grant or program with which the funder is closely involved. For instance, the Freeman Foundation retained TCC Group to design and implement a five-year evaluation of its \$100 million Undergraduate Asian Studies Initiative. The consulting team collected both formative and summative data to enhance the Foundation’s understanding of the program and provide information to inform decision-making about its strategic direction.

<sup>1</sup> “Foundations Trim Staffs After Assets Slide Lower,” by Stephanie Strom, *The New York Times*, June 20, 2009.

<sup>2</sup> According to research from the Association of Small Foundations, the median base salary for a full-time CEO/Administrator for foundations is \$101,500 (173 respondents), \$72,000 for grantmaking staff (124 respondents), and \$50,111 for administrative/support staff (93 respondents). Association of Small Foundations’ 2009 Salary and Benefits Report, pages 6 and 7.

<sup>3</sup> Additional research done by the Association of Small Foundations found that the total

operating and administrative expenses as a percentage of noncharitable-use assets had a median percentage of .83 for foundations with no paid staff versus 1.53 for foundations with paid staff (467 respondents). Association of Small Foundations’ 2009-2011 Foundation Operations and Management Report, page 33.

<sup>4</sup> *Current Practices in Family Foundations, A Study in Support of the Pursuit of Excellence Assessment Process*, by Susan Crites Price and Alice Buhl, the National Center for Family Philanthropy.

<sup>5</sup> From the Association of Small Foundations’ website: [www.smallfoundations.org](http://www.smallfoundations.org).

## What Functions Do Grantmakers Outsource?

Generally, outsourced functions fall into three categories: **planning**, **implementation**, and **evaluation**. The table on page 5 shows some possible roles for funders and consultants in various outsourcing situations. With all outsourcing, it is important for the grantmaker to stay involved along the way to provide direction, make key decisions, and, in some cases, be trained.

### *Planning Functions*

Whether set up to operate in perpetuity or with a defined “sunset” date, foundations are always looking to the future. Planning is a crucial function, but one that many grantmakers find they don’t have time for when they are busy taking care of day-to-day responsibilities. Outsourcing can provide both necessary momentum and objectivity to funders looking to address short-term needs and/or achieve long-term goals. External experts can help grantmakers assess needs, develop a vision of where they want to be, identify the best route to get there, and overcome obstacles that stand in the way.

Funders often outsource the development of a full strategic plan. After 90 years of grantmaking, the New York City-based Altman Foundation identified the development of a first-time strategic plan as a critical tool for ensuring impact in the years to come and after a self-assessment process identified the value of hiring objective strategic planners. Consultants from TCC Group used an in-depth data collection process to gain a thorough understanding of the Foundation’s diverse stakeholders and provided the Foundation with recommendations that were later implemented. In another example, the Community Foundation for Greater Buffalo hired TCC Group when it wanted to develop a comprehensive strategic plan that would help it play a leadership role in addressing its city’s challenges. In this case the consultants were not from the region but were experts in the process of planning.

Planning for a specific program can also be outsourced. In the corporate funding world, for example, a new corporate employee fund might need experienced outside help to design and implement a grantmaking process and provide expertise related to particular funding areas. UBS Global Wealth Management hired TCC Group to assist with the strategic development of a UBS Employee Giving Campaign that would motivate and inspire employees, involve them in the community through giving as well as hands-on volunteering, and would increase company pride. Assistance was provided in planning, launching, and managing the resulting Building Brighter Futures Campaign, which focused on supporting innovation in education for disadvantaged youth in the United States and around the world.

### *Implementation Functions*

Funders may lack not only the staffing resources to fully implement their programs as they envision them, but also the breadth of knowledge and experience required to run a highly effective grantmaking

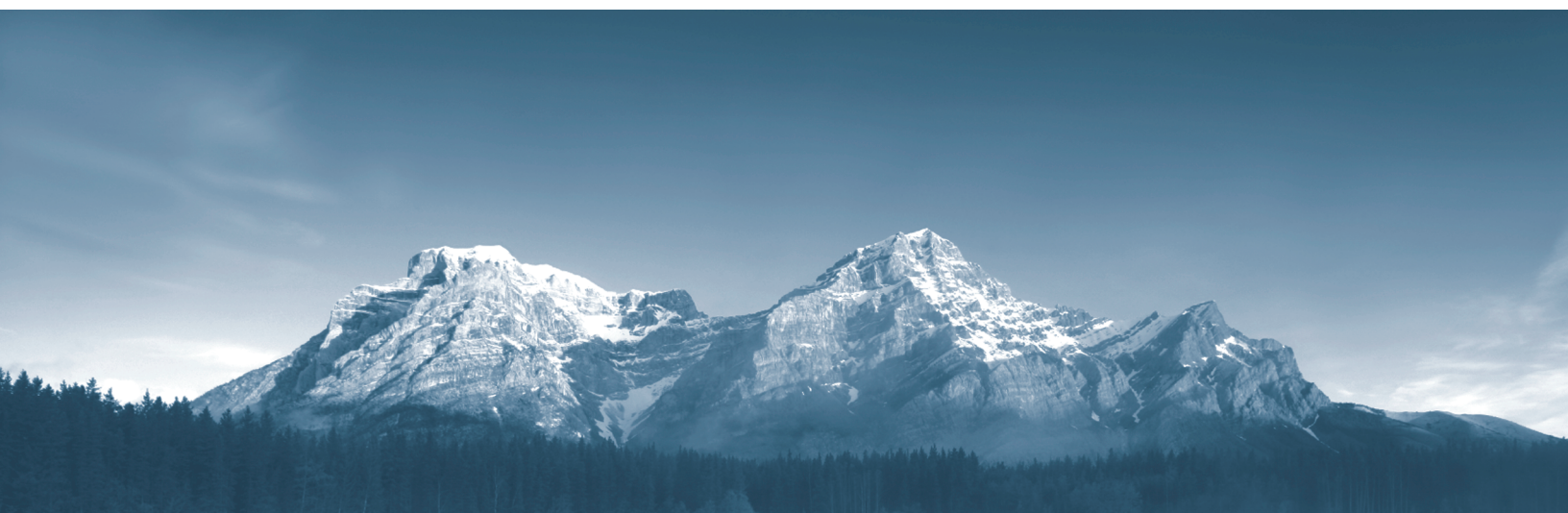
entity. Outside experts can help funders implement and manage a single program—or multiple programs—by providing technical assistance and a range of intermediary services along the entire program continuum, from developing an initial Request for Proposals to the development and management of post-grant monitoring processes. Critical grantmaking implementation functions that can be outsourced include but are not limited to: screening proposals for eligibility; analyzing proposals and making recommendations; developing and managing a grants database; preparing materials for board review; drafting applicant and grantee communications; managing program partners (such as capacity-builders and evaluators); managing complementary grant strategies (such as capacity-building initiatives and grantee convenings); providing grantmaking training to staff and/or committees; and re-granting funds to grantee partners.

As seen in the table on page 5, many outsourced functions fall into the “implementation” category, none more so than full-service foundation management administration. Often, smaller to mid-size family foundations find it both cost-effective and strategic to hire an expert third-party to serve as the foundation “office” and handle tasks ranging from grantmaking to bookkeeping. The Mary J. Hutchins Foundation, which supports health and human services in the New York City area, decided to have TCC Group act as part-time staff and manage the day-to-day activities of the Foundation, including all programmatic functions, instead of hiring a permanent employee. “Outsourcing has enabled us to simplify management and has given us an added degree of professionalism that we did not have before,” notes Waldo Hutchins III, the foundation’s president.

Corporate foundations and contributions departments have various reasons to outsource implementation of its programs. Pfizer, for example, required additional support for the day-to-day management of its multi-year programs where the focus was on building closer relations with grantee partners. The use of consultants from TCC Group allowed Pfizer not only to leverage expertise in capacity building, effective programs, and evaluation for the benefit of its grantees, but also to gain valuable time to concentrate on the internal and external communications of the programs. Erica Weinberg, Director of Worldwide Corporate Responsibility at Pfizer, notes that “Our consultant filled a critical need for us by providing a range of expertise for our intense projects that would have been difficult to implement with just our own staff. Our signature initiatives are multi-pronged with program, evaluation and capacity-building support. The consultants were able to coordinate and manage the various moving components while providing excellent ‘customer service’ to our grantee partners, which deepened their association with Pfizer.” In the UBS example mentioned earlier, TCC Group helped build the capacity of the UBS staff over time to fully implement and manage the “Building Brighter Futures Campaign” in-house. The Campaign was eventually rolled out nationally to over 500 branch offices in eight regions.



OUTSOURCING: POSSIBLE ROLES		
	Funder	Consultant/Contractor
Planning	<ul style="list-style-type: none"> <li>Identify types of needs and program models on which to focus.</li> </ul>	<ul style="list-style-type: none"> <li>Conduct needs assessment and research on other program models.</li> </ul>
	<ul style="list-style-type: none"> <li>Provide guidance on budget parameters and sign off on budget amount.</li> </ul>	<ul style="list-style-type: none"> <li>Research financial needs and costs and help determine grant program budget.</li> </ul>
	<ul style="list-style-type: none"> <li>Advise on strategy options and select strategy.</li> </ul>	<ul style="list-style-type: none"> <li>Develop grantmaking strategy.</li> </ul>
	<ul style="list-style-type: none"> <li>Provide input for theory of change development and evaluation planning.</li> </ul>	<ul style="list-style-type: none"> <li>Articulate theory of change and design evaluation framework and methodologies.</li> </ul>
	<ul style="list-style-type: none"> <li>Determine types of possible grantees.</li> </ul>	<ul style="list-style-type: none"> <li>Identify potential grantees and set up a database of applicants.</li> </ul>
Implementation	<ul style="list-style-type: none"> <li>Hire and oversee consultant or contractor to manage foundation.</li> </ul>	<ul style="list-style-type: none"> <li>Provide “full-service” administration and grants management.</li> </ul>
	<ul style="list-style-type: none"> <li>Set parameters for guidelines and/or Request for Proposals, review and approve them, and advise on their distribution.</li> </ul>	<ul style="list-style-type: none"> <li>Write and distribute funding guidelines and/or Requests for Proposals.</li> </ul>
	<ul style="list-style-type: none"> <li>Make grant decisions, inform grantseekers of funding decisions, and pay out grant funds.</li> </ul>	<ul style="list-style-type: none"> <li>Assist grantees in preparing letters of interest and/or proposals, review and assess them, and conduct due diligence through phone calls and/or site visits.</li> </ul>
	<ul style="list-style-type: none"> <li>Help establish fiscal agent account and other fiduciary arrangements.</li> </ul>	<ul style="list-style-type: none"> <li>Serve as funding intermediary and/or fiscal agent for funder.</li> </ul>
	<ul style="list-style-type: none"> <li>Advise on grant monitoring process and methods.</li> </ul>	<ul style="list-style-type: none"> <li>Monitor grants by establishing grant files and database, creating grant agreements, reviewing progress reports, scheduling check-in calls, and making site visits.</li> </ul>
	<ul style="list-style-type: none"> <li>Learn about grantmaking and grants management and build internal capacity.</li> </ul>	<ul style="list-style-type: none"> <li>Provide grantmaking and grants management training to funder.</li> </ul>
Evaluation	<ul style="list-style-type: none"> <li>Identify needs of individual or cohorts of grantees.</li> </ul>	<ul style="list-style-type: none"> <li>Provide capacity-building services to grantees.</li> </ul>
	<ul style="list-style-type: none"> <li>Advise on evaluation goals and audiences; help determine which grants and/or initiatives to evaluate; and allocate budget for evaluation.</li> </ul>	<ul style="list-style-type: none"> <li>Plan evaluation by determining evaluation goals, questions, audiences, framework, methods, and budget.</li> </ul>
	<ul style="list-style-type: none"> <li>Oversee evaluation, meet regularly with evaluation contractor to discuss evaluation implications for grantmaking, and revise grantmaking goals and strategies based on results.</li> </ul>	<ul style="list-style-type: none"> <li>Conduct evaluations and advise on how to use findings.</li> </ul>
	<ul style="list-style-type: none"> <li>Share relevant evaluation findings with grantees and others in the field.</li> </ul>	<ul style="list-style-type: none"> <li>Develop strategy for disseminating evaluation findings to grantees and others in field.</li> </ul>
	<ul style="list-style-type: none"> <li>Learn about evaluation and build evaluation capacity.</li> </ul>	<ul style="list-style-type: none"> <li>Provide evaluation training and technical assistance to funder and/or grantees.</li> </ul>



Consultants can also be used to help grant-making staff increase their understanding of evaluation theory, design, implementation, and data collection.

Corporate trustees of foundations based at banks frequently delegate the grants management function to an outside contractor. “With investment management and fiduciary services as core competencies, many financial institutions simply do not have staff with expertise for grantmaking, particularly for trusts or donors with very specific interests,” observes Hildy Simmons, philanthropic advisor and former Managing Director, Global Foundations at JPMorgan Chase Bank. Similarly, a “family office” that has been administering a family foundation as a natural outgrowth of the family’s philanthropy may not have the staff time or expertise to handle more complicated grantmaking matters.

The planning and implementation of capacity-building programs can also be outsourced. Consultants can provide capacity-building expertise themselves and/or manage a capacity-building program. For example, TCC Group was hired to manage a long-term capacity-building initiative for a set of civic engagement nonprofits funded by the Irvine, Packard, and Hewlett Foundations in California. The firm’s work includes designing applications and other forms, administering the selection process in conjunction with the foundations, and facilitating technical assistance for two tiers of grantees.

### *Evaluation Functions*

Foundations use evaluation contractors in various ways, depending on the extent of their in-house evaluation capacity. Grantmaking organizations that have evaluation staff on board might use outside evaluators mostly for discrete evaluation assignments. Funders that do not have a full-time evaluation officer can use an external consultant to

play a more comprehensive role. In such cases, the external evaluator can not only help the funder design an overall evaluation system and guidelines, but can also help make grants for evaluation as well as select, manage, and oversee other outside evaluators who are assessing specific grants or programs. Consultants can also be used to help grantmaking staff increase their understanding of evaluation theory, design, implementation, and data collection.

The California Endowment uses outside contractors to enhance the capacity of its evaluation investments, and has outsourced a broad range of evaluation activities to TCC Group. These have included developing a series of training sessions on the basics of evaluation for a grantee resources center, conducting a prospective evaluation of a grantee, developing a handbook and workshop to help grantees build capacity in planning for a learning-based evaluation, and designing and implementing a learning-based evaluation curriculum to grantee organizations that includes some training sessions in order to build local capacity for delivering the curriculum on an ongoing basis.

Outside evaluators can also be used to facilitate peer learning among a group of grantees. The Howard Hughes Medical Institute, a nonprofit medical research organization that ranks as one of the nation’s largest philanthropies, hired evaluators from TCC Group to develop peer evaluation clusters to promote learning and sharing of promising practices. In addition to facilitating this group technical assistance, TCC Group also conducted a study that measured the results of this learning process.





## How Can Funders Best Manage an Outsourcing Arrangement?

For funders that are worried about outsourcing, below are some tips for managing a successful outsourcing arrangement:

Begin by clarifying your reasons for outsourcing. Is it to increase efficiency, effectiveness, objectivity—or some combination of the three? Then, articulate your rationale to prospective consultants as well as to such other stakeholders, such as board members, supervisors, and colleagues.

To find potential partners, take advantage of resources that maintain directories of consultants, such as the Association of Small Foundations, the National Center for Family Philanthropy, and the National Network of Consultants to Grantmakers. Local affinity groups may also maintain a list of recommended consultants. Talking to fellow funders and other professionals your foundation hires, such as accountants, lawyers, and investment advisors, may yield good leads as well.

When selecting an outside contractor, consider several possible candidates, check references, and choose the one who has the most appropriate knowledge and experience and with whom the chemistry is best. Next, create a formal written agreement that defines a clear scope of services, mutual expectations, and a description of final deliverables. Include a confidentiality statement in your contract. Spell out your respective roles carefully and be explicit about the amount of control you want. It is best to avoid delegating too much, particularly tasks such as making major policy decisions or handling sensitive matters. If you use a consultant to interact directly with prospective and current grantees, it is important to spell out for the consultant—in writing—the precise roles each will have and identify who will be the grantees' primary contact.

Be aware of legal opportunities and limitations. Paying consultants to perform work that furthers your foundation's charitable purpose generally counts toward payout. Your organization may even be able to employ expenditure responsibility grants to pay for-profit contractors to perform tasks that serve a charitable purpose. An attorney or the Council on Foundations can offer guidance on when expenditure responsibility grants can be used and how to handle them correctly. Also recognize any relevant legal constraints, such as those related to fiscal sponsorship and segregation of grant monies.

Throughout the process, manage the consulting relationship best by keeping the lines of communication open and providing continual feedback on performance. If necessary, end an unproductive relationship if the outside contractor is not meeting your expectations. Keep in mind that a good consultant should want the engagement to be as collaborative and successful as the funder does.

## Potential Pitfalls of Outsourcing

While many outsourcing arrangements are successful, some funders enter them with trepidation. They may worry about delegating appropriately or feel a loss of control. Depending on the type of work that is being outsourced, funders may also have decreased contact with applicants and may feel somewhat removed from their grantees. Another potential pitfall is that the funder may become too dependent on the consultant. Many expert consultants incorporate training into their work, so that the funders can learn during the engagement and eventually become less dependent on the external advisors. A good consultant will be aware of potential pitfalls and will work hard to ensure the funder feels completely comfortable in the arrangement.

## The Bottom Line on Outsourcing

In any economic climate, funders need to use limited resources wisely both for their own sake and for that of their grantees. For some funders, alternative staffing models such as outsourcing provide a way to do more with the dollars they have. In this paper, we have shown through TCC Group's experience and client examples that outsourcing can save time and money, provide expertise where needed, and bring a measure of objectivity to grantmakers' work. We have also seen that outsourcing can be utilized for all or part of a wide range of grantmaker functions, including planning, implementation, and evaluation. Funders looking to outsource need to be explicit about what and why they want to outsource, communicate this well to prospective outsourcing partners, and—of course—hire wisely! Not all grantmakers will feel comfortable with outsourcing, but for those that do and do it smartly, the result can be greater efficiency and, ultimately, an increase in the positive impact of their grantmaking.

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## About TCC Group

Formed in 1980, TCC Group provides strategic planning, program development, evaluation and management consulting services to foundations, nonprofit organizations, corporate community involvement programs, and government agencies. Its consulting staff includes individuals with wide-ranging expertise and experience in a diverse range of issues including education, arts and culture, community and economic development, human services, health care, children and family issues, and the environment.

From offices in New York City, Philadelphia, Chicago, and San Francisco, the firm works with clients nationally and, increasingly, internationally. Services to our clients include capacity building, organizational assessment and development, feasibility studies, program and organizational evaluation, board development, restructuring and repositioning, as well as grant program design, evaluation, and management.

### Grantmaking Services

To better meet the trend of funders seeking to outsource grants and program management services, TCC Group has increased its services at every stage of the grantmaking process. The firm's "full-service" capacity includes the ability to provide any combination of individual grants management services, including:

- Assessing Needs
- Devising Grantmaking Strategies
- Soliciting, Reviewing, and Recommending Proposals
- Grants Management
- Evaluating Grantmaking
- Administrative and Programmatic work

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