



Grant Report 2016 General Operating Support

Thank you for your financial support in 2016. General operating support grants allowed us to carry out our mission of empowering philanthropists to leverage their resources and amplify their impact. Your support helped us meet our goals and act on opportunities that aligned with our strategic framework of guiding, connecting, and championing philanthropy practiced with few or no staff. This report documents our accomplishments and activities in calendar year 2016.

YEAR-END REFLECTION

What an exciting and affirming 12 months 2016 was for Exponent Philanthropy! The year marked the 20th Anniversary of the inception of our organization. Our year-long anniversary celebration included new programming, a successful fundraising campaign, and the presentation of three inaugural Outsized Impact Awards that recognized individuals whose contributions had far-reaching effects on our association.

Below are a few of our most notable 2016 accomplishments:

- **Largest National Conference**, based on paid registrants, serving nearly 950. 92% of attendees said they would attend another National Conference and 95% would recommend our conferences to someone else.
- **Successful *Philanthropy Lessons* video series and campaign**, including the launch of nine videos that received 250K+ views.
- **Two sell-out peer learning cohorts**, including our fourth Next Gen Fellows Program and a new Coaching for Effective Philanthropy program.
- **Vibrant social media presence**, including 1,000+ new Twitter followers and 100+ blog posts earning 43K+ views.
- **New offerings for funders of all types, roles, and experience levels**, including resources and programs on leadership, collective impact, catalyzing change, and more.

- **Updating and Re-release of The Foundation Guidebook** for those new to foundations or philanthropy, with new content and design.
- **Strong local connections through Local Engagement Groups** in seven cities and regions around the country.
- **Expanded liability insurance offerings**, now including Directors & Officers Liability, Business Owner's Policy, Workers' Compensation, and Cyber Liability.

PRIORITY GOALS & 2016 HIGHLIGHTS

Central to our mission is a strategic framework built around guiding, connecting and championing the work of small staffed funders such as yourself. We are pleased to present 2016 highlights around each of these pillars of our framework.

GUIDE: We measure our success in guiding members and other philanthropists who work with few or no staff by helping them become increasingly knowledgeable in the core, intentionality, and leadership topics they need to excel in all phases and aspects of their work.

Highlights:

- **Benchmarking data** - In 2016, we combined our Salary & Benefits survey with our Foundation Operations & Management survey in order to streamline our operations and reduce survey fatigue among our members. Overall survey response was slightly less compared to 2015 in terms of total number of respondents, but the total response of 495 members (25%) was more than sufficient to report on a representative sample of members.
- **National Conference** - In September, we hosted in Chicago, IL our largest conference in terms of paid registrants. The conference served approximately 950 donors, trustees, foundation staff, and other philanthropy professionals. The overall conference rating based on participant evaluations was a 4.02 (on a scale of 1-5). 92% of respondents said they would attend a future National Conference and 95% said they would recommend the conference to others.

In total, the program included more than 45 sessions on all aspects of philanthropy. The most popular sessions were: *Five Key Elements for Greater Impact*; *Unlock the Power of Questions and Deep Listening*; *Small Assets - Big Impact*; and *Leadership Succession Planning*.

The conference had a net positive impact on our overall 2016 budget due to stronger than expected registrations, keeping expenses under budget, and

strong foundation and sponsor support. The extra revenue from the conference allowed us to invest in other areas of the organization.

- **Distance Learning** – At the beginning of 2016, we set out to reduce the number of webinars we do each year while maximizing attendance by leveraging partnerships. However, due to opportunities that arose throughout the year, particularly from corporate partners to underwrite programs, we ended up putting on slightly more distance learning programs in 2016 than we did in 2015. Leveraging partnerships did result in more webinar participants in 2016, with 737 compared to 582 in 2015.
- **Local Engagement Groups** – In 2016, Exponent Philanthropy members led local engagement groups in seven regions: Northern Virginia, New York City, Boston, Southern Massachusetts, Northern Ohio, San Francisco, and Chicago. In total there were 15 local engagement group gatherings held in 2016 which attracted 356 participants.
- **Learn & Connect Programs** – In addition to local engagement groups, Exponent Philanthropy held four Learn & Connect programs that featured a discussion on *Making the Most of Your Giving*. These programs were sponsored by Wells Fargo Philanthropic Services and attracted 53 participants. While the programs were successful in terms of learning opportunities and connecting members, attendance was unfortunately, far below our goals for these programs.
- **Peer Learning Cohorts** – In 2016, we held two peer learning cohorts including our fourth NextGen Fellows Program and our inaugural Coaching for Effective Philanthropy cohort.

The NextGen Fellows Program sold out with 27 participants. The two day intensive received a 4.18 overall program rating and 100% of the participants were inspired to take action by the program.

In addition to the NextGen Fellows program we put on for members, we also developed a NextGen Fellows program for Fidelity Charitable and their donors. This new program was crafted based on our legacy program but adapted for donors who use donor advised funds as their primary giving vehicle. The Fidelity Charitable program included a two day learning intensive and three follow-up webinars.

In 2016, we also created and marketed a new peer learning cohort designed to teach coaching skills to funders. The program attracted 27 participants and received a 3.8 overall satisfaction score. The program scored high (4.5) when asked if participants learned something new but participants also shared several suggestions on how to improve upon this program and how to link coaching skills more effectively to philanthropy. We will be taking this feedback into consideration as we decide how to move forward with this

program in 2017.

- **Assessments** - In 2016, we offered three assessments: 1) 10 Minute Impact Assessment; 2) Board Self-Assessment, and 3) Grantee Application & Perception Survey. The 10 Minute Impact Assessment is open source and available for anyone to download from our website. In 2016, it was downloaded 253 times. Although down from the 400+ downloads in 2015, the 10 Minute Impact Assessment continues to be one of our most popular resources. We did not sell any Board Self-Assessments in 2016 and we sold two Grantee Application & Perception Surveys.
- **Retired & Rebranded Content** - In 2016, we continued our effort to review, update, and rebrand all of our content - a process that started in 2013 as part of the preparation for the launch of Exponent Philanthropy. Eight primers were updated in 2016 and several more are slotted to be updated in 2017. Our intent is that this effort will be completed in 2017. Going forward we will establish a regular editorial review process that will ensure the quality of all our content on an ongoing schedule.
- We **partnered** with more than 40 philanthropy support organizations, philanthropic advisors, and vendors to deliver and enhance learning outcomes for our members and other key audiences. These activities included speaking/training at programs as well as jointly developed content.

CONNECT: We work diligently to help members and other philanthropists who work with few or no staff to be increasingly connected to one another, Exponent Philanthropy, relevant trends, and resources that will strengthen their work.

2016 Highlights:

- **In person programming** - Exponent Philanthropy connected 2,247 funders through its in person programming in 2016. This includes participation at our National Conference, at local programs, and at our one-day seminars. The number of participants represents a 7% increase over program participants in 2014 (the last year we held a National Conference).
- **Introduced new member discussion group platform** - In addition to connecting funders at in-person programs we also connect them virtually through technology. We offer an online membership directory that members can use to connect to one another and we offer online member discussion lists that allow members to ask one another questions and share information. As part of our internal database upgrade (more detail provided in technology section later in this report), we launched a new platform for our member discussion groups, which is powered by Salesforce Community. During the year, we saw a 22% increase in posts (469) to our member discussion lists compared to the prior year.

CHAMPION: Sharing the stories and impact small-staffed funders have on their communities and society at large is at the core of our champion work where we celebrate and showcase the unique style of philanthropy practiced by funders who work with few or no staff.

2016 Highlights:

- **Philanthropy Lessons** - During the first half of 2016, thanks to a grant received from The Fund for Shared Insights, we released a nine part video series that showcased funders and grantees discussing their most important philanthropy lessons. The videos were disseminated in partnership with The Chronicle of Philanthropy during a six month period to maximize each video's impact. The videos received more than 250,000 views, which exceeded our expectations.
- **Foundation Operations & Management Report** - In 2016, we released and disseminated our annual Foundation Operations & Management Report, which details trends among small-staffed foundations in the areas of grantmaking, operations, governance, and investments. This report continues to be a valued member benefit. However, sales of the publication to non-members did not meet expectations despite our attempt to market it more aggressively than we have in the past.
- **Media efforts** - In 2016, Exponent Philanthropy was mentioned in media outlets 23 times, which represents an increase from nine times in the prior year. The increase can be attributed to our Philanthropy Lessons partnership with The Chronicle of Philanthropy and a steady increase in strong relationships with journalists who cover the philanthropy and social innovation sector.
- **Outsized Impact** - In December of 2016, we released our annual Outsized Impact Report. The 2016 edition served as an opportunity for us to shine a light on several examples of how members are having an outsized impact in their communities and priority funding areas. We also utilized this annual e-pub to showcase our greatest 2016 accomplishments and thank our financial supporters.

20th ANNIVERSARY CELEBRATION

As mentioned in the beginning of this report, we celebrated the 20th Anniversary of our organization's inception in 2016. This celebration included a special webinar that covered important philanthropy trends, a blog series that showcased member stories of how our organization has impacted their philanthropy, and culminated with three Outsized Impact Awards, which were presented to individuals who had a significant impact on the growth and success of our organization. We also launched a 20th Anniversary fundraising campaign to raise the funds needed to invest in our future. Specifically, we set out to raise \$200,000 to serve as the seed funding needed to develop a new offering that would provide technical assistance to members in the area of legal guidance. We exceeded our goal and expect to launch this new service in late 2017.

KEY METRICS/MEASURES OF SUCCESS

Educational Programs Attendance, Revenue, and Evaluations

Exponent Philanthropy's 2016 educational programs attracted 2247 participants. This represents a 7% increase in participants compared to 2014, our last National Conference year.

Some 737 individuals participated in 22 distance learning programs; 54 individuals participated in peer learning cohorts; and 526 individuals attended in-person programs other than our National Conference. Our total program registration revenue was \$937,000, which represents a 38% increase from 2014 (our last National Conference year).

Evaluation scores indicate that program participants were highly satisfied. The average participant overall evaluation score was 4.1 on a scale from 1-5.

Publication Sales and Distribution

Most of our publications and online content are free to members. However, we do sell several publications to non-members. Publication revenue was \$24,662, which is slightly more than in 2015 but lower than budgeted.

Our most popular publications (in terms of sales) continue to be our *Trustee Handbook*, *Foundation Operations & Management Report*, and *Foundation Guidebook*.

Grants and Sponsorships

In 2016, we raised \$1.5M in grants, corporate partnerships/sponsorships, and royalty income. This is approximately \$100,000 more than in 2015. The increase in grants can be attributed to the 20th Anniversary Campaign.

Specifically, we raised \$900,000 in foundation grants, \$560,000 from corporate partners, and \$80,000 in royalties.

Impact of our Work:

From the Foundation Operations and Management Survey, we learned that as a direct result of membership in Exponent Philanthropy:

- 73% of members are inspired to learn new topics
- 72% have learned the nuts and bolts of running a foundation
- 64% are more efficient in their operations
- 65% have learned strategies to make a difference
- 55% feel more engaged or fulfilled by their involvement with the foundation
- 49% see themselves or their foundations as more of a leader
- 47% feel more connected to their peers
- 44% have greater impact in their giving

Member Acquisition and Retention

In 2016, we attracted 148 new members. This represents the second highest new member total during the past six years (2014 was higher with 188 new members). Renewals were strong throughout 2016, and we are projecting a renewal rate of 90% for the year. Membership numbers will not be final until March 31, 2017 due to our 3-month grace period. As of December 31, 2016, our membership count was 1955 maintaining our position as the largest philanthropy support membership organization.

Although we ended the year with a slightly lower number of members than the previous year, we saw membership attrition decrease compared to recent years. This positive development can be attributed to additional staffing allocated to our membership function. Our goal is to turn the membership trend positive by the end of 2017.

Member Support

Member satisfaction can also be measured by support of Exponent Philanthropy. In 2016, approximately 77% of our revenue came from members through membership dues, grants, publication sales, and program registrations. This percentage represents a 7% increase compared to 2015.

Technology & Social Media

Thanks to funding received from Fidelity Charitable's Trustee's Philanthropy Fund and The William and Flora Hewlett Foundation we upgraded our internal database to a customized Salesforce platform. This was a significant effort that took nine months and involved our entire staff. Although the launch of the new system did not go as smoothly as we had hoped, the system is now operating as expected and we are realizing the benefits from a system with enhanced functionality.

We served 93,140 unique visitors through our website in 2016, which represents 67% increase from the previous year's 55,517 unique visitors. Our most popular content areas were the 2016 National Conference, Career, Resources by Topic, and About pages. Top topics of interest were disaster relief, teen philanthropy, grant making, tax & legal, boards & governance, and administration.

We continued to expand the reach of our PhilanthroFiles blog in 2016, achieving 23% more views than the previous year (48,145 in 2016 vs. 38,994 in 2015), including our best-viewed month in the blog's 4-year history (May 2016: 5006 views). We achieved these gains with a similar number of posts year-to-year (111 in 2016 vs. 108 in 2015). The power of social sharing and partnerships with member authors (32% of posts) and colleague authors (27% of posts) allowed us to grow the blog efficiently.

In 2016, we realized a 21% increase in Twitter followers, bringing us to 6,780 followers. Engagement decreased compared to the prior year, with a monthly average of 127 mentions compared to a monthly average of 144 mentions in 2015.

CONCLUSION

By all measures, 2016 was a successful year for Exponent Philanthropy. We held a very successful National Conference, introduced new and updated resources, celebrated our 20th Anniversary, helped advance our members' philanthropy, and elevated Exponent Philanthropy's position in the philanthropic sector. We continued to provide the resources and connections that enable our members to make the most of the time they have and the dollars they have to give, all while championing the profound impact of our members' philanthropy.

We hope you share in our sense of accomplishment, None of this would have been possible without you and our other financial supporters. We are sincerely grateful and look forward to your continued support.