

Title **The Story of the Tools Cluster**

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Abstract: This report distills the work of the W.K. Kellogg Foundation *Build Tools for Nonprofit Sustainability and Innovative Giving* cluster.

Over the four-year life of the Tools cluster, 85 members of 21 cluster organizations participated in at least one of five networking meetings. Regional meetings, venture fund projects, planning teams, and evaluation interviews provided additional venues for interaction.

The report is structured in three sections. The Statements section summarizes facts about cluster membership, meetings, and programs. The Statistics section provides condensed evaluation information, including values for the time, money, and know-how unleashed by the Tools projects. The Stories section features insights about cluster dynamics and lessons learned.

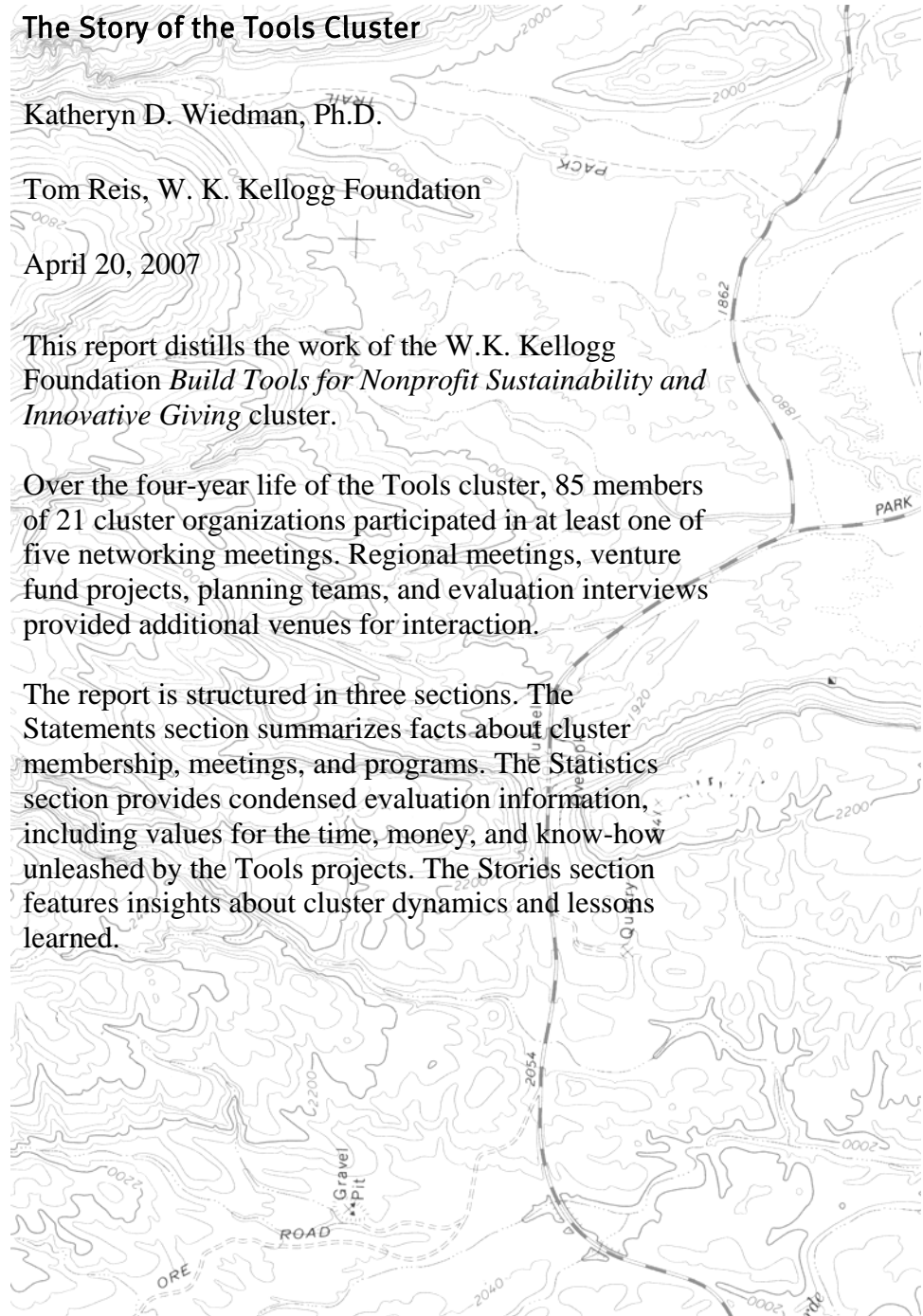


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The Story of the Tools Cluster

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CenterPoint Institute

Acknowledgements

This report is a product of CenterPoint Institute’s work with the W.K. Kellogg Foundation *Build Tools for Nonprofit Sustainability and Innovative Giving* cluster. Ideally, the information will be of value to the cluster members as they think about decisions leading to long-term sustainability of their tools, to WKKF and other funders as they consider initiatives with similar intended outcomes, and to the work of intermediary organizations charged with creating structures and programs leading to similar goals.

On behalf of everyone at CenterPoint Institute, I want to thank Tom Reis, Program Director in Philanthropy and Volunteerism at the W.K. Kellogg Foundation, for inviting us to support his work with this group of grants. Working with Tom was a peak experience. His bold vision stretched us, his willingness to take risks stimulated our creativity, and his commitment to our partnership inspired loyalty.

I also thank the Tools members for their interest and countless contributions to the achievements of the cluster. At the outset of our involvement with this project, Tom alerted us to the entrepreneurial nature of the people involved—we were not disappointed! We found the cluster members bright, creative, and passionate about their organizations. They worked shoulder-to-shoulder with us to build a community out of a collection of individualists.

Finally, to the staff at CenterPoint, thanks for your dedication to the Tools cluster, including your help with this report: Dee Jimenez, Administrative Assistant; Brien McHugh, Communication Director; Cathy Martinez, Evaluation Director; and Jessica Heidrich, Project Manager. Cathy’s work, in particular, provided the data about the reach and utility of the tools, tracked how partnerships emerged, and interpreted cluster phenomena. I am proud of your “whatever it takes” dedication and would go to the ends of the earth with you.

Katheryn D. Wiedman, Ph.D.

CenterPoint Institute

The Story of the Tools Cluster

There is a certain embarrassment about being a storyteller in these times when stories are considered not quite as satisfying as statements and statements not quite as satisfying as statistics; but in the long run, a people is known, not by its statements or its statistics, but by the stories it tells.

Flannery O'Connor (1925-1964) U.S. fiction writer and essayist
Mystery and Manners, Occasional Prose, Part 5
New York: Noonday Press, 1969

The Tools cluster has at least 122 storytellers. Over the four-year life of the cluster, 85 members of cluster organizations attended at least one of five networking meetings. In addition, 13 W.K. Kellogg Foundation staff, six CenterPoint Institute staff, and 21 outside speakers attended at least one meeting.¹

Each person touched by the cluster has a story to tell about their Kellogg-funded project – about a colleague met, knowledge gained, or action taken as a result of their participation. It is impossible to collect all the individual stories, so the story told in the following pages is, as much as possible in condensed form, the story of the whole.²

Flannery O'Connor's quotation lends a structure to this story of the Tools cluster: *statements, statistics, and stories*. In the statements section, we summarize cluster basics—who, what, why, when, and where. The statistics section highlights facts and figures about what the tools accomplished. The stories section uses vignettes to illustrate the quality and depth of engagement as well as selected lessons learned. In the appendices, readers will find a list of Tools cluster members, Cultures of Giving cluster members, summaries of networking meeting programs and expert presenters, a list of reports and communication products generated during the life of the cluster, and a glossary of terms.

¹ Please see Appendix A for a list of cluster members, WKKF and CenterPoint staff, and Appendix B for a list of outside speakers.

² More details are available in the 29 reports and other documents generated for WKKF and the cluster by CenterPoint Institute. These reports are listed in Appendix C. The annual reports of the 20 grantee organizations are archived at WKKF.

Statements

In September 2002, twenty W.K. Kellogg Foundation (WKKF) grantees were invited to participate in Tools cluster activities and the cluster-level evaluation. These grantees were among more than 40 organizations in the *Build Tools for Nonprofit Sustainability and Innovative Giving* approach (Tools Approach) in the Unleashing Resources initiative—a WKKF Philanthropy and Volunteerism (P&V) program initiative.³ An additional grantee was added to the cluster in October 2003, bringing the total to 21 organizations. Within the first year, one organization had stopped participating in the cluster, bringing the total back to 20.

These organizations were selected to participate in cluster activities because of their potential for productive interaction, joint programming, collaboration, and developing a community of practice. If these potentials could be realized, the cluster could make a significant contribution to increasing nonprofit organizations' sustainability and to creating new avenues for more citizens to give their time, money, and know-how to civic engagement and improving the quality of life in communities.

The goals for the cluster were to: 1) develop and strengthen tools which support the nonprofit sector; 2) increase accessibility to and use of these tools within the nonprofit sector, particularly by three primary population groups—women, youth, and communities of color; and 3) form a community of practice through increased partnership activity among the cluster members.

WKKF contracted with CenterPoint Institute to provide cluster programming services that included networking meetings, cluster evaluation, communication activities, and management of the venture fund programs. CenterPoint's behind-the-scenes services included grantee support and overall cluster management/coordination.

The primary programming method of the Tools cluster was a series of five networking meetings:⁴

1. Net1: March 24–26, 2003, Tempe, Arizona
2. Net2: October 28–30, 2003, Tempe, Arizona
3. Net3: March 23–5, 2004, Philadelphia, Pennsylvania
4. Net4: November 30–December 2, 2004, Tempe, Arizona
5. Net5: January 23–26, 2006, Tempe, Arizona.⁵

The central purpose of Net1 was for WKKF to convey its vision for the cluster, explain cluster evaluation, and introduce the cluster members to each other. The program for Net2 focused on organizational sustainability. Engaging communities of color was the theme for Net3. Net4 was

³ A glossary of terms is located in Appendix D.

⁴ For ease and brevity of expression, the networking meetings are referred to as Net1, Net2, Net3, Net4, and Net5 in this report.

⁵ Appendix B provides a program summary for each networking meeting.

thought to be the last networking meeting—its program focused on framing the future and organizational sustainability through connecting. Net5 provided an opportunity for Tools members to come together one more time and to connect with a new cluster of P&V grantees: Cultures of Giving.

Tools cluster organizations were invited to send two representatives to each meeting. The organizations and their representatives are listed in Appendix A. With the exception of Net1 and Net5, planning teams comprised of cluster members helped develop the networking meeting programs. These planning teams helped set the goals and objectives for each meeting and guided the development of programs and activities that would be of interest to members. The program content for each meeting is summarized in Appendix B.

Other cluster programming methods included two sets of regional meetings and four venture fund programs. Regional meetings were held primarily to collect evaluation data. Each regional meeting ran approximately 5 hours; each Tools organization was asked to send one representative to a regional meeting in 2004 and again in 2005. The regional meetings offered a selection of dates and locations:

2004: January 21 Washington, DC

January 23 Palo Alto, CA

January 30 Atlanta, GA

2005: May 17 Tempe, AZ

May 19 San Francisco, CA

May 24 Vienna, VA

May 26 Lansing, MI.

To encourage relationship formation and partnering among the Tools members, a venture fund program was developed. Each venture fund was a source of financial support for Tools organizations to engage each other in topic-focused activities. Venture funds were non-competitive mini-grants—all member organizations were eligible to apply for an equal portion of each venture fund.

- The Venture Fund for Learning and Collaboration, announced at Net1, ran from March – September, 2003. \$72,000 was awarded to 18 organizations (\$4,000 each) to implement learning and collaboration activities.
- The Venture Fund for Engaging Communities of Color, announced at Net2, ran from October 2003 – March 2004. \$64,000 was awarded to 16 organizations (\$4,000 each) to implement activities related to engaging communities of color in their work.

- The Venture Fund for Continued Connecting, announced at Net3, ran from March 2004 – August 2004. \$44,740⁶ was awarded to 14 organizations for activities that created more opportunities to connect with other Tools organizations.
- The Venture Fund for Cross-Cluster Connecting, announced at Net5 (the joint meeting with the Cultures of Giving cluster) ran from January – August, 2006. \$68,000 was awarded to 33 organizations (\$2,000 each) to implement activities that brought members of the two clusters together.⁷

Statistics

The Tools cluster of the Unleashing Resources initiative was intended to affect the advancement of innovative ways of giving—of making time, money, and know-how available to support the work of nonprofit organizations. The ultimate vision of the strategy was “A mutually responsible and just society in which all contribute to the common good through volunteering and philanthropy.” The tools developed by grantees in the cluster to enhance the resources available to the nonprofit sector included online databases, training and technical assistance resource, research reports, and innovative means to identify volunteer opportunities, raise money, and share knowledge.

Conservatively estimated, \$17,248,160,000 in time, money, and know how was generated by a WKKF investment of \$22,053,573—a 782% social return on investment.

Time: For cluster members who linked volunteers to service opportunities, over 3 million referrals and over 700,000 matches were reported.

- Since its inception in 2001, more than 230,000 people have found volunteer opportunities through the Network for Good website.
- VolunteerMatch had a record number of 2,803,112 referrals in 2006.
- Independent Sector’s research indicates that volunteers with formal organizations average 24 hours per month and is valued at an average \$18.77 per hour.⁸ Assuming the volunteers referred to formal organizations by cluster members averaged 24 hours per month, the value of their time would be estimated at \$3,784,032,000.

Money: For those cluster members focused on innovative means for increasing funds available to the sector, over \$13.4 billion in donations were generated. Those members who put a dollar figure on donated products or savings to organizations as a result of training or technical assistance calculated total savings of over \$300 million [a total of 1,150,997 donated technology products were shipped to nonprofits].

⁶ 13 organizations requested \$3,300 and one organization requested \$1840.

⁷ Four organizations were members of both clusters. These organizations had the opportunity to apply for two projects (\$4,000 total) to support separate collaborations.

⁸ http://www.independentsector.org/programs/research/volunteer_time.html, April 9, 2007.

- Acumen Fund investments reached \$6.7 million for health related projects, \$1.4 million for housing, and \$1.4 million for water.
- Since its inception, Capital Markets Access helped over 100 organizations and projects with transactions of approximately \$600 million.
- Over \$13.4 billion in donations were reported by cluster members (\$9,511,404 invested specifically in cluster members that do this work – \$1,408 raised for each dollar invested).
- Since 2002, GlobalGiving has become an independent 501(c)(3) public charity with over 2,500 donors and over \$2.8 million in support for projects throughout the world.
- Since 2001, Network for Good facilitated the online donation of over \$100 million to over 20,000 charities.

Know-how: Tools members provided access to information and knowledge via a wide range of media including conferences, websites and web-based tools or training, training programs and seminars, services to individual organizations, listservs, and e-newsletters. The total savings to the nonprofit sector through the use of these various tools across the period was estimated at \$248 million.

Conservatively estimated, services were provided to over 90,000 organizations. Over 10,000 attendees were reported for more than 500 programs or conferences. Eight websites reported over 11.7 million users.⁹ The number of ‘hits’ to websites ranged from 99,791 to 7.6 million; websites and web-based tools in the cluster reported over 12 million users.

- The Center for Nonprofit Leadership and Management remains the primary educational enterprise in the field for Arizona and the Southwest.
- Association of Small Foundations built the ‘Foundation in a Box,’ created a new primer series of 12-20 page discussion papers on essential topics for foundation management, developed a suite of trustee leadership seminars and conferences supported by printed and digital knowledge resources, and produced the New Foundation Guidebook and the Colleague-to-Colleague Guide.
- Capital Markets Access case studies and publications have been used at the following institutions: Harvard Kennedy School of Government, University of Wisconsin Center on Poverty, Southern New Hampshire University School of Community Economic Development, New School University Milan Public Policy School Finance Lab, Georgetown University McDonough School of Business, and Boston College Center for Corporate Involvement.
- GuideStar’s national database contains information on over 1.5 million IRS recognized 501(c) nonprofits; each day over 20,000 people find answers using the database (in 2006 over 1 million unique users visited the site).

⁹ Every Tools organization has a web site or web-based tool, yet only 8 described their web site when discussing marketing or outreach and only 5 provided information on users/visitors.

- Since its inception, NPower has provided more than 189,000 hours of consulting to nonprofits, trained more than 7,000 organizations in how to use or plan for technology, and helped more than 18,000 organizations assess their current technology using the online TechAtlas tool.

Stories

The Story of the Tools Cluster finds its origins in a stream of WKKF funding activity that began in 1998 when P&V Program Director Tom Reis began making grants to emerging organizations that were working in the Internet space or using technology in innovative ways to foster new philanthropy or volunteering. These new forms of giving included foundation incubators, virtual volunteering, e-Philanthropy, venture philanthropy, and entrepreneurial models.

At the time these organizations received their initial funding from the Foundation, the Unleashing Resources initiative was still in the planning stages and continually evolving. Grant-making to organizations that were using technology to influence giving or were developing new educational programs to increase philanthropy or sustainability of nonprofit organizations were on the leading edge of the work being done in the Unleashing Resources initiative. Planning for initiative-level and cluster-level evaluation was still in process and the initiative's goals and objectives were being revised and fine-tuned.

WKKF selected cluster members in large part because they were seen to be key players in the new century's nonprofit infrastructure and, if they could develop a "shared agenda for learning and action," they could have significant impact on the sector. WKKF envisioned the cluster becoming a *community of practice* and member organizations as a *force in the 21st century nonprofit infrastructure*.

The Story of the Tools Cluster began in the autumn of 2002 when 20 selected grantees learned of the Foundation's interest in forming the cluster and CenterPoint Institute was contracted to facilitate cluster programs, including a hoped-for community of practice. Prior to this period, the grantees did not know about the Unleashing Resources initiative; the Foundation's evaluation questions; the desired focus on women, youth and communities of color; or what a community of practice might be. Representatives of the cluster organizations attended their first networking meeting in March 2003, eager to learn more about what the Foundation had in mind.

What's In It for Me?

Early in the life of the cluster, Tools members questioned the time-cost of being part of the group, asking, “What’s in it for me?” Laser-focused on their individual organization’s mission, several believed that every day out of their office to attend a Tools meeting was a day lost for being on-mission. A good number of the Tools organizations were start-ups. Funded by foundation grants that would end all too soon, they were working hard to develop strategies to sustain their organizations after grant dollars ran out. Spending time out of the office diverted their attention from the critically important issue of sustainability—a major concern for many.

Two other themes played a role in members’ thinking about the cluster. For several members, it was hard to see benefits in meeting with other WKKF grantees, some of which were competitors operating in virtually the same space. Others expressed frustration with funders in general who initiated various kinds of meetings for their grantees to attend. A few characterized WKKF as a “high maintenance relationship.”

Drawing most grantees to the first meeting was the belief that that they and their organizations would benefit in some unspecified way by rubbing elbows with WKKF personnel so they were willing to go along with the cluster idea. Initial reluctance to engage in the cluster changed, however, as relationships formed and high-quality educational programs were delivered.

By the end of Net4, when members were invited to participate in a reflection session, it was clear that the “What’s in it for me” question had answers. Multiple benefits had been derived from participation in the cluster:¹⁰

- All organizations’ teams identified specific ways their organizations had used information learned in educational sessions at the meetings: informing work on grant proposals, incorporation into training programs, business planning, branding and marketing efforts, partnering activities, and donor campaigns.
- All organizations’ teams identified specific ways involvement in the cluster aided in the success of their WKKF-funded project or their organization. Eleven of fifteen teams (73%) identified a set of ways the cluster contributed to their success: knowledge and resource sharing, relationship building, and opportunity for collective innovation.
- All teams identified specific benefits their organizations had gained from involvement: gained a peer group (87%), gained access to resources and knowledge (67%), and increased partnering or relationships with other organizations (53%), for example.
- All teams had members who identified specific things they had individually gained from involvement in the cluster: individual relationships and support systems (87%), professional development (60%), new awareness and perspectives (30%), time for reflection (27%), and access to experts (13%), for example.

¹⁰ Complete data from this reflection session is available in the Net4 evaluation report.

One member characterized his participation in the cluster as being similar to taking dance lessons as a youth. He said, “My mother forced me to go to dance lessons. I could see no benefit, and resisted energetically. Later, I was happy that I had the lessons.” This member, initially unable to see any benefit to attending cluster meetings, later stated that the quality educational sessions at the meetings was “Like getting a mini-MBA.” In a November 2003 telephone interview, one respondent summed up the general tone of the group: “The time in the meetings is a lot to ask for, but when you weigh that against what we are GETTING – the benefit outweighs the cost. It’s been worth its weight in gold.” An answer to the “What’s in it for me?” question follows:

VolunteerMatch’s Andrew Smiles was in DC on business. As he was walking between appointments, he ran into Bob Ottenhoff of GuideStar. Had they not met through the Tools cluster, they would not have recognized each other on the street. As it was, they talked for a while about the importance of registering users of their websites. VolunteerMatch was struggling with the issue and GuideStar had just finished struggling with the issue. GuideStar’s experience enabled Andrew to go home and institute a registration procedure for VolunteerMatch.

The Group Grope vs the Light Switch

The organizations involved in the Tools cluster were an eclectic group—some dealt with social capital (connecting donors, investors, or volunteers with nonprofits), some addressed the provision of knowledge (through consulting, databases, websites, or academe), and others represented a variety of technology-focused tools (information portals, databases, technology solutions, or software). The tools developed were varied and intended to serve a broad range of needs.

The tools were not, however, easily categorized into the three groups described: social capital, knowledge provision, and technology. In fact, when just such a typology was shared with a set of cluster members at Net2, they adamantly disagreed with how they or others were categorized. At regional meetings three months later, members were invited to create a typology that made sense to them and to categorize other cluster members accordingly. While members consistently categorized a couple organizations (i.e. the two university members), there was no other consistency in how organizations were characterized. This activity demonstrated that, regardless of the Foundation’s view that the members had much in common and called them all “Tools,” the grantees themselves did not see their commonalities. The perception of differences was strong and influenced the evolution of the cluster.

Throughout the life of the cluster, members wanted more information than WKKF was willing to provide—they wanted Foundation staff to flip on the light switch. Members felt they were groping in the dark, trying to figure out what the Foundation wanted them to do and trying to find the partners that WKKF wanted them to find. They asked, Why were we chosen to be in the cluster? Who are we supposed to partner with? What do you want us to do?

For its part, the Foundation would not engage in match-making or prescribing particular behaviors. WKKF believed that members needed to find benefits on their own and that external recommendations would not lead to success.

Members' tendency to see their differences was one of many challenges faced in forming a community of practice. Others included the geographic distances between members; lack of consensus for what a community of practice would look like; the disparate nature of the business for each of the grantees; and the lack of frequent contact. Despite these challenges, there was evidence that a community emerged as members found their own light switches; an example follows:

NPower National and CityCares (now Hands On Network) are national organizations with networks of regional affiliates. The two organizations most likely would not have sought out each other as partners due to the perception of competitive missions. After collaborating on a venture fund activity, they found their missions to be complementary, not competitive, and an organizational relationship developed beyond the initial collaborative activity. Members of both organizations felt comfortable discussing organizational issues at a deeper level than they might otherwise have shared with a perceived competitor.

A Case of Shared Ownership—The Member's Voice

Through the process of assembling a cluster of grants, funding networking activities, and evaluating the contribution of the cluster to Unleashing Resources outcomes, the Foundation had developed certain ideas about what the cluster could achieve. Past WKKF programming experience demonstrated that bringing groups of grantees together in a sustained series of convenings would produce greater impact than the grantees could achieve in isolation. From the grantees' perspective, however, being invited to participate in a cluster was a mixed blessing. Rubbing elbows with a major funder was seen by many as an opportunity to further build a relationship with that funder and to learn more about future grant opportunities. On the other hand, participating in cluster activities was seen as a demand on one's time—a resource even more scarce than money.

One might be inclined to think that “he who pays the piper calls the tune,” but in the case of the Tools cluster, that view would be only partially accurate. Certainly WKKF owned the cluster in a financial sense and through positional leadership, yet Tools cluster members were quick to express their opinions about cluster activities. Their voice became a significant force in the evolving work of the cluster.

As early as the first networking meeting, members found their voice. The Net1 program's primary purpose was to launch the cluster, deliver WKKF messages about the Unleashing Resources initiative, and begin to develop the hoped-for “shared agenda for learning and action.” On the second day of the meeting, members worked in breakout groups to identify possible elements of that shared agenda, addressing the question, “What could the Tools cluster do together that would contribute to our collective learning and action?” But when the breakout

groups reported their discussion and members were asked to find themes that would translate into a shared agenda, they balked. They stated firmly, “We don’t know each other well enough yet”—resulting in modification of the program schedule to accommodate members’ need to learn more about each other.

For subsequent networking meetings, members responded to CenterPoint’s invitations to serve on planning teams. These teams guided meeting goals and objectives, helped identify and select speakers, and assisted with the development of other program elements. Members willingly accepted leadership roles and often volunteered for extra tasks, establishing their co-ownership of the cluster; an example follows:

Tools members requested time to meet in small groups to discuss issues of shared interest. To meet this request, the planning team for the third networking conference developed a small group programmatic structure, dubbed “Construction Crews.” To form the Construction Crews, each planning team member offered to convene a group focusing on a self-selected topic of interest. The discussion/peer-learning aspect of the Construction Crews succeeded in varying degrees. The ultimate goal—responding to, and facilitating, a need voiced by the participants—was achieved.

Whose Goal Is It, Anyway?

As noted earlier, many of the organizations in the Tools cluster received WKKF grants very early in the developmental period of the Unleashing Resources initiative. Strategies were still evolving even as the cluster was forming. While a central goal of the strategy was the engagement of communities of color in philanthropy and volunteerism, it was not a stated goal or condition of funding for the individual Tools grants. Nonetheless, in forming the cluster WKKF wanted the Tools organizations to adopt the Unleashing Resources goal of increasing the engagement of youth, women, and communities of color in their organizations as well as increasing services to these populations. The Foundation believed that these cool, new *tools for nonprofit sustainability and innovative giving* should serve all people in all communities and that outreach, in particular to communities of color, was essential.

While neither the number nor programmatic content of networking meetings was pre-determined by WKKF, the Foundation did choose “engaging communities of color” as the program focus for Net3. In characteristic fashion, as plans for Net3 were unveiled at the end of Net2 some cluster members resisted the Foundation’s imposition of this program focus as well as the group process selected for addressing the topic at Net3.

Some members objected to the Foundation’s focus on youth, women, and communities of color, asserting that all kinds of diversity, including sexual orientation, should be included. Others rejected the group process that had been selected for addressing the goal of engaging youth, women, and communities of color—a process that would have produced a shared action agenda related to the topic. They asserted that the cluster was not comprised of people who would go home after a meeting and work together on a shared agenda. Instead, members wanted a meeting

method focused on content: specific examples of how other organizations successfully engaged people of color, in-depth information on current research, census data, Internet usage and barriers, purchasing habits, giving patterns of communities of color, cultural literacy, channels, pipelines, gatekeepers, and so forth. Eventually the Net3 program was designed to meet both the needs of the Foundation and the interests of the members.

The moral of the story is that asking grantees to embrace a goal that was not stated at the time the grant was made, a goal they did not set for themselves and that they did not necessarily see as an organizational priority, is not likely to produce optimal results. Yet the learning sessions at Net3 and the subsequent Venture Fund for Engaging Communities of Color encouraged members to engage in research, try new strategies, explore the relevance of the goal to their organizations, and encouraged partnerships with communities of color that otherwise may not have occurred. An example follows:

The hope that the Tools organizations would become a “force in the 21st century nonprofit infrastructure”—a “community of practice” with a “shared agenda for learning and action”—may have been an audacious goal, but it was clearly a goal. When it became evident that not all 20 organizations would be able to develop and implement a unified action agenda, we nevertheless saw all 20 sharing learning agendas in their networking meetings and smaller partnerships forming action agendas through the venture fund program. According to one cluster member, “We were skeptical and downright critical of the cluster idea. We thought it was a diversion from our mission. But we have come 180 degrees and now recognize the value of being involved.”

Doing Deals

One goal for the cluster was to increase partnering activity among the cluster organizations. It was believed that partnering and collaboration would be a tool for improving organizational effectiveness and contribute to organizational learning and sustainability. As described in the [The Group Grope vs the Light Switch](#) story, cluster members were frustrated with the high degree of ambiguity regarding why they had been invited to the cluster. Some saw little similarity between themselves and other members; others saw too much similarity—to the point of being competitors. To encourage partnering in either case was a bold goal. Clearly, an incentive was needed.

Past experience had shown the Foundation that some partnerships would occur as a matter of course when grantees were brought together, particularly when groups of grantees were brought together repeatedly over a period of time. Shared experiences and shared learning fosters such relationships. Venture funds, however, proved to be an innovative incentive for facilitating the rapid formation of multiple partnering efforts.

“Venture fund” was a name given to program in which dollars were earmarked to support Tools members to “do deals” with each other. Over the life of the cluster, there were four venture funds (please see page 5 for details). None of the venture funds was competitive in the way that grant-seeking is competitive; all cluster members were entitled to receive funding if they proposed a

project that involved one or more other members. The amounts of funding were relatively small, varying between \$4,000 per organization for the first venture fund and \$2,000 for the fourth, but the impact was large. The venture funds helped create an environment that promoted creativity, encouraged members to seek opportunities to find meaning, and fostered risk taking in the sense of partnering with organizations that might appear to be one's competition.

By the end of the cluster,

- Two mergers were in place:
 - Michigan Nonprofit Alliance and NPower Michigan and
 - Groundspring and Network for Good.
- One new affiliate relationship had been established:
 - NPower National and Michigan Nonprofit Alliance.
- Nine pairs of organizations were engaged in ongoing partnerships activities:
 - GlobalGiving and Women's Funding Network;
 - Association of Small Foundations and The Foundation Incubator;
 - GuideStar and Community Foundations of America;
 - Community Foundations of America and CompuMentor/TechSoup;
 - Network for Good and VolunteerMatch;
 - CompuMentor/TechSoup and NPower National;
 - NPower National and Plugged In;
 - Arizona State University's Center for Nonprofit Leadership and Management and Grand Valley State University's Dorothy Johnson Center; and
 - Grand Valley State University's Dorothy Johnson Center and the National Center for Nonprofit Enterprise.
- One pair of organizations had concrete plans in place to pursue partnership activities:
 - Acumen Fund and Community Foundations of America.
- One organization attributed the success of a project to the support (information/services) of another cluster member:
 - GuideStar reported benefiting from support provided by CompuMentor/TechSoup.

Fueled by networking meetings, regional meetings, participation in planning groups, and venture funds, partnering activity among the cluster members increased dramatically. At the start of the cluster work, only nine of the cluster members (45%) reported being engaged in two-way partnerships with other cluster members and only six (30%) reported being engaged in

partnerships outside the cluster. By the end of the cluster, all members (100%) reported two-way partnerships with at least one other cluster member and fifteen (75%) reported being engaged in partnerships outside the cluster. An example follows:

Grand Valley State University (GVSU) and National Center on Nonprofit Enterprise (NCNE) partnered in the Venture Fund for Learning and Collaboration. The funding enabled GVSU to join NCNE thereby increasing NCNE's membership and enabled NCNE to hold a seminar in a part of the country where they had not had a member before. By joining NCNE, GVSU is able to offer new, high quality educational programming to nonprofit organizations in the area.

Words Create Worlds

In the early days of the cluster, language was coined. That language labeled the hoped for outcome of the convening of cluster members as a “community of practice.” Once coined, members of the Kellogg team and cluster members alike wondered aloud and to themselves, “What IS a community of practice?” A discussion paper was written in an attempt to describe it—to give meaning to the newly coined language. The paper was shared with everyone and the information it contained was accepted by all as the definition and full description of what the new language intended to convey.

Although the content of the paper was never discussed in a networking meeting, perhaps actions speak louder than words in this case. The Tools cluster was convened four times in face-to-face networking meetings and met twice in regional sub-groups. Members had opportunities to partner with one another in four venture fund programs, and helped shape the content and structure for this work through participation on planning teams and through surveys.

Finding common ground for working together proved to be an intellectual test at the beginning. At the first networking meeting, the group was challenged to develop a “collective agenda for learning and action” and declined to do so, indicating they did not know enough about one another (see [A Case of Shared Ownership—The Member's Voice](#) page 11-12). Despite not having developed the type of joint action agenda originally envisioned by WKKF, it was not an insurmountable obstacle to their being able to learn together, to learn from one another, and to gain benefits which are often evident from communities of practice. In fact, members identified many benefits similar to those Wenger, McDermott, & Snyder (2002)¹¹ indicate are derived from communities of practice.

In the words of one cluster member, “The cluster has paid off for me in knowledge of the cluster members and what they have to offer. I can't begin to quantify how many times I have used this knowledge without having to hunt for answers and how many times I have referred others to

¹¹ Wenger, McDermott, & Snyder (2002). *Cultivating communities of practice*. Boston, MA: Harvard Business School Press.

useful resources. It has paid off in a network of colleagues I feel very comfortable call and connecting with.” For example,

Andy Wolber (NPower Michigan) indicated that he now makes more referrals to organizations in the Tools cluster because he ‘knows’ them and feels a connection to them.

Conclusion (How do YOU Spell Success?)

Determining progress toward achievement of intended cluster outcomes is difficult due to the disparate nature of the work of the cluster members and the differing levels of formal project evaluation. However, it is clear that

cluster members made progress on several fronts. Partnering activity increased: 100% of cluster members had at least one partnership with another cluster member and 75% reported on partnerships with organizations outside the cluster. One year after the end of formal networking activity, cluster members continued to report important contributions that partnering had or was having on their organization’s success.

It seems clear that for many of the cluster members a community of practice was established. Even a year after the end of cluster convenings, the majority of cluster members (90%) were actively engaged with at least one other cluster member in meaningful ways that extend the learning that is a central benefit of communities of practice. Through the increase in partnering behavior, members began to feel that the cluster held some characteristics of community for them. The reflections shared through focus group interviews, again at the fourth networking meeting, as well as during the joint meeting with the Cultures of Giving cluster, indicated the value cluster members gained from convening.

All members described evidence that their tools reached clients, customers, users, or members, and their numbers reflected new efforts and audiences reached:

- The dollar amount of donations generated across the group was over \$13.4 billion;¹²
- Cost savings to the nonprofit sector was over \$300 million;
- More than one million donated technology products found their way to nonprofits that needed them;
- \$600 million in capital to support community development efforts was generated through loan issuance and liquidity;
- Over 280 million volunteer referrals and 700,000 matches were made;
- Nonprofits reported that the rate at which they were able to convert referrals to actual volunteers increased; and

¹² This number represents the total reported increase in assets through fundraising across the period of the; although members used many different means to raise these funds, at least one-third of the total can be attributed to the use of the new tools developed by the cluster members.

- The number of information portals, websites providing valuable knowledge to the sector for improved decision making, training opportunities and academic programs, and outreach and advocacy efforts increased.

The emphasis on the three primary population groups (women, youth, and communities of color) informed and shaped many of the cluster members and their organizations. Several efforts to learn more about the primary population groups and to identify the needs of these populations were completed, as were several efforts to understand current users and customers and to identify the extent to which these groups were being served. Because of these activities, a number of cluster members reviewed and revised procedures, staffing and board structures, curricula, policy, etc. in an effort to reposition themselves to engage the primary populations in their programs and services effectively or to advocate on behalf of the primary groups.

Reports from cluster members indicate that not only have short-term outcomes intended for the cluster been achieved, but there is evidence that anticipated impacts are beginning to be realized. Unanticipated outcomes also have occurred, but have not been studied. Surely the story will continue to develop outside the scope of WKKF funding.

Whether the Tools cluster became or will become a “force in the 21st century nonprofit infrastructure is unknown. But without a doubt, member organizations contributed immeasurably to the giving of time, money, and know how. Cluster members:

- Made it easier for people to find places to volunteer and for organizations to find volunteers.
- Enabled massive online responses and donations to early 21st century disasters such as 9-11, the Southeast Asia tsunami, and hurricanes Katrina and Rita.
- Put discounted technology in the hands of nonprofit organizations and supplied technology training to nonprofit workers.
- Put technology and resources in the hands of underserved populations.
- Extended and made the sector’s knowledge base more easily accessible.
- Made it possible for ordinary Americans to support quality-of-life projects around the globe and in their own backyards.
- Increased the quality and quantity of philanthropy expressed in small foundations and community foundations.
- Put the financial expertise of Wall Street to work for social issues.

As always, there are unanswered questions, but the social return on investment in tools to build nonprofit sustainability and innovative giving is apparent. Now it is time for the community of practice to do what effective communities know to do: celebrate success. An alumni reunion may be in order!

APPENDIX A:

Tools Cluster Organizations and Members

Acumen Fund

- David Buxbaun
- Jacqueline Novogratz
- Peter Poli
- Mariko Tada
- Brian Trelstad
- Gavin White

Arizona State University

- Robert Ashcraft
- Stephanie Hiatt
- Patricia Lewis
- Madia Logan
- Andrew Ortiz

Association of Small Foundations

- Louis Beccaria
- Thomas Blaney
- Charles Flemming
- Christyne Hamilton
- Kathryn Petrillo-Smith
- Tim Walter

Capital Markets Access

- Gregory Stanton

Community Foundations of America

- Dalene Bradford
- Carla Dearing
- Caroline Heine
- Susan Herr

CompuMentor home of TechSoup

- Billy Bicket
- Matt Florence
- Bennett Grassano
- Daniel Ben-Horin
- Jody Mahoney
- Rebecca Masisak
- Gayle Samuelson Carpentier
- Dara Westling

GlobalGiving (formerly DevelopmentSpace)

- John Hecklinger
- Mari Kuraishi
- Britt Lake
- Carol Realini
- Elizabeth Stefanski
- Uma Vohra
- Dennis Whittle

Grand Valley State University

- Allison Lugo Saenz
- Gustavo Rotondaro
- Ashima Saigal
- Angela Vander Hulst
- Donna VanIwaarden

Groundspring

- Dan Geiger
- Cheryl Gipson
- Joseph Mouzon
- Michael Stein

Guidestar

- Chuck McLean
- Dan Moore
- Bob Ottenhoff
- Debra Snider

Hands On Network (formerly City Cares of America, Inc.)

- Stuart Alan Clarke
- Lisa Flick
- Paige Moody
- Michelle Nunn
- Jesse Salinas

Michigan Nonprofit Association

- Sam Singh
- Erin Skene
- David Swenson

Appendix A (cont.)

Tools Cluster Organizations and Members

National Center on Nonprofit Enterprise

- Richard Brewster
- Linda Lumbert
- Sarah Masters
- Dennis R. Young

Network for Good

- Scott Case
- Kate Grant
- Bill Strathmann
- Ken Weber

NPower Michigan

- Jan Gensheimer
- Kristine Mucher
- Kathleen Teodoro
- Andy Wolber

NPower National

- Steve Anderson
- Emily Bancroft
- Lindsay Bealko
- Roz Edison
- Joan Fanning
- Jaime Greene
- Aho Sai Mauck
- Megan McNally

Philanthropix Partners, Inc.

- Jim Carreker
- Christine Denniston
- Mike Fine
- Diane Schweitzer

Philanthropy Incubator Silicon Valley (formerly The Foundation Incubator)

- Elizabeth Bremner
- Eleanor Clement Glass
- Lorna Lathram

Plugged In-Learning Through Technology

- Magda Escobar
- Christina Heitz

VolunteerMatch

- Jay Backstrand
- Gregory Baldwin
- Deborah Dinkelacker
- Sarah Rhyins
- Andrew Smiles

Women's Funding Network

- Christine Grumm
- Debi Harris
- Emily Katz Kishawi
- Cynthia Schmae
- Debbie Zamd
- Amy Marie Zucchero

85 individuals from 21 organizations attended the networking meetings.

Net1 was attended by 43 individuals representing 19 organizations.

Net2 was attended by 44 individuals representing 21 organizations.

Net3 was attended by 37 individuals representing 20 organizations.

Net4 was attended by 33 individuals representing 18 organizations.

Net5 was attended by 31 individuals representing 19 organizations.

Appendix A (cont.)

WKKF Personnel

The following individuals attended all five networking meetings:

- Thomas Reis
- Mike VanBuren
- Alandra Washington
- Huilan Yang

Additional attendees at Net1:

- Karla Lutjens

Additional attendees at Net2:

- Charles Davis
- Christine Kwak
- Robert Long
- Dan Moore
- Lesley Williams

Additional attendees at Net3:

- Alicia Santiago-Gancer

Additional attendees at Net4:

- Robert Long
- Karla Lutjens

Additional attendees at Net5:

- Kim Andrews
- Christine Kwak
- Donna Lartigue
- Robert Long
- Karla Lutjens
- Dan Moore

Total number of WKKF staff attending at least one networking meeting: 13.

CenterPoint Institute Personnel

The following individuals attended all five networking meetings:

- Katheryn Wiedman (Heidrich)
- Dee Jimenez
- Cathy Martinez
- Brien McHugh

Nia Willis attended Net2, Net3, and Net4; Jessica Heidrich attended Net5.

Appendix A (cont.)

Cultures of Giving Cluster Organizations and Members Attending the January 23-26, 2005 Cluster Networking Meeting

African American Legacy Council

- Barbara DeBaptiste

Alliance for Education

- Stephan Blanford

American Indian Family Center

- LaVon Marie Lee

American Indian Family Empowerment Program

- Carrie Day Aspinwall
- Juanita G. Corbine Espinosa

Ananse Consulting

- Omisade Burney-Scott

Arab-American Family Services

- Nareman Taha

Arab Community Center for Economic and Social Services

- Maha Freij
- Taleb Salhab

Asian Americans-Pacific Islanders in Philanthropy

- Lori K. Kodama
- Peggy Saika

Association of Black Foundation Executives

- Kenneth Austin
- Emilio Dorcely
- Judy M. Ford

Black Philanthropy Trust – People of Color in Philanthropy

- Ruby V. Smith Love

Boston Women’s Fund

- Yee Won Chong
- Renae Gray

Cardinal Stritch University Leadership Center

- Angela McCullough
- Jeanette Mitchell
- Sheila Payton

The Center for Community Action

- Donna Chavis
- Mac Legerton

Center on Philanthropy and Civil Society

- Eugene D. Miller

Changemakers Foundation

- Donna Bransford
- Mark Toney
- Stephanie M. Walker
- Stephanie Yang

Chicago Foundation for Women

- Mary Morten

Community Development Institute

- Rashid D. Herd

The Community Foundation for Greater New Haven

- Kia Nikole Levey

Delta Research and Educational Foundation

- Mona H. Bailey

Appendix A (cont.)

Cultures of Giving Cluster Organizations and Members Attending the January 23-26, 2005 Cluster Networking Meeting

Diversity Leadership Academy

- Juan D. Johnson

Diversity Pipeline Alliance

- Karen Johns

Emerging Practitioners in Philanthropy

- Rusty M. Stahl

Empower New Haven, Inc.

- Althea Marshall Richardson

Faith Partnerships

- Cynthia Williams
- Diana Jones Wilson

Grassroots Leadership

- Alfreda R. Barringer
- Pam Pompey
- Monica Raye Simpson

Hands On Atlanta

- Malukah Berry
- Gary L. Turner

Hands On Network

- Toby Chalbert

HindSight Consulting/NGAAP/Ujamaa

- Darryl K. Lester

Hispanic Association on Corporate Responsibility

- Rima Kazuko Matsumoto

Hispanic Federation

- Jose Calderon

Hispanics in Philanthropy

- Jenny Everett
- Lydia Johnson
- Rafael Mazer

Hopi Foundation – Natwani Coalition

- Andrew Lewis
- Micah Loma'omvaya
- Barbara Poley
- Loris Ann Taylor

JP Morgan Private Bank

- Lisa Philp

Leadership Education for Asian Pacifics, Inc.

- J.D. Hokoyama

Maali Enterprises

- Amjad Maali

National Black MBA Association, Inc.

- Barbara L. Thomas

The National Center for Black Philanthropy

- Janice Ferebee
- Samuel N. Gough, Jr.
- Rodney M. Jackson
- Michelle Reid

National Community Development Institute

- Kelley Denise Gulley
- Diana Marie Lee
- Frank J. Satterwhite

National Society of Hispanic MBAs

- Cristina Candia Lopez

Native Americans in Philanthropy

- David Cournoyer
- Joy Persall
- Gabrielle Strong
- Cecilia Martinez

Appendix A (cont.)

Cultures of Giving Cluster Organizations and Members Attending the January 23-26, 2005 Cluster Networking Meeting

The Overbrook Foundation

- Rini Banerjee

Oxley Hill Missionary Baptist Church

- Vonner G. Horton

Potlatch Fund

- Andrea Alexander
- RedWolf Pope

Public Allies

- Alison R. Beloin Dean
- Artavia B. Berry Roberson
- David McKinney

Resource Generation

- John Harrison
- Taij Jumarie Moteelall
- Jamie Schweser

Rose Community Foundation

- Elsa Holguin

Social Justice Fund NW

- Bookda Gheisar

Social Venture Network

- Pamela Chaloult
- Deborah Michelle Nelson

Southern Partners Fund

- Fernando Cuevas, Jr.
- Cynthia Laramore
- Tirso Moreno
- Janet Perkins

Sponsors for Educational Opportunity

- Jonathan Feldman
- William A. Goodloe
- Daree Lewis

The Twenty-First Century Foundation

- Sandra Toussaint-Burgher

University of North Carolina – Chapel Hill

- Charles Price

William Caspar Graustein Memorial Fund

- Maria Mojica

Women of Color Fundraising Institute

- Alison Bowens

Women’s Foundation for a Greater Memphis

- Ruby Bright

Women’s Fund of Greater Milwaukee

- LG Shanklin-Flowers

Women’s Funding Network

- Deborah Marie Harris

Women’s Theological Center

- Donna Bivens

APPENDIX B:

Networking Meeting Programs and Expert Presenters

All five networking meetings had two goals in common: connecting with other organizations and refining Kellogg's vision for the cluster. To facilitate these goals, formal and informal activities such as group dinners, extended breaks, marketplaces, and receptions were built into the schedule. Organization profiles were distributed, portrait photos were posted and each organization was given space to display literature and materials. Each meeting also had a unique third goal that required specialized activities such as workshops, seminars, small group discussions, or themed events. Highlights of each meeting are summarized below.

Net1 – March 2003, Tempe, AZ

Unique Goal: The unique goal of the first networking meeting was to begin the development of a community of leading edge organizations offering tools for nonprofit sustainability and innovative giving. Such a community would consist of organizations working not only toward their own mission achievement, but possibly toward a shared agenda for collective learning and action.

Shared Agenda for Learning and Action: First in small groups then in the large group, members worked to develop a shared agenda for learning and action. In the process, they voiced strong opinions about working together. Relationships between the organizations weren't well established yet. Members felt they could not develop a shared vision until they knew more about each other. In less than an hour, the meeting schedule was revised to give members more opportunities to showcase their own organizations and to hear about the work of others. Members delivered brief, formal organization presentations that were videotaped and posted on the web.

The Marketplace and Venture Fund: WKKF envisioned networking meetings as a method for fostering partnerships among Tools organizations—"doing deals" in the parlance of the day. Two program activities were developed to encourage deal-making. The first venture fund (Venture Fund for Learning and Collaboration) was announced, offering financial support for organizations to explore commonalities with other Tools cluster members. A marketplace, with organization displays, decorations, music, food, and refreshments helped members get acquainted and find partners to collaborate in a venture fund activity.

Speakers:

Robert Ashcraft – Director, Arizona State University Center for Nonprofit Leadership and Management

Net2 – October 2003, Tempe, AZ

Unique Goal: The planning team stressed that the over-riding concern of Tools members was their organizations' survival. Many were startup organizations funded largely by grants and facing financial imperatives. For this reason, the unique goal of Net2 was organization sustainability strategies and related topics. A workshop model featured expert presenters on alternative funding strategies, commercial ventures, organization collaboration, marketing/branding, and product/service pricing. A fish-bowl exercise offered the workshop presenters as doctors trying to diagnose and cure the ailments of the nonprofit sector.

CompuMentor (a Tools cluster member) presented a case study of their award-winning business planning process and the award application steps. Tools cluster organizations were also given up to \$170 to obtain educational materials directly related to their unique sustainability issues and questions.

Planning Team: Net2 was the first networking meeting planned with significant input from members. Likewise, the programs for Net3 and Net4 were developed by member planning teams.

Venture Fund: The second Venture fund was unveiled at Net2. The purpose for the Venture Fund for Engaging Communities of Color was to increase Tools cluster organizations' ability to serve the needs of these communities, involve them in programs and services, and include them in decision-making and leadership roles.

Speakers:

Kevin Walters – Managing Director, Global Capital Management, Inc.

Jerr Boschee – Executive Director, Institute for Social Entrepreneurs

Elyse Cherry – Chief Executive Officer, Boston Community Capital

David LaPiana – President, La Piana and Associates

Bob Tobin – President, Williams Group

Toyin Moore – Account Executive, Williams Group

Rigoberto Rodriguez – Consultant, Orange County Future Search Network

Sandra Janoff – Consultant and Director, Future Search Network

Net3 – March 2004, Philadelphia, PA

Unique Goal: In a closing session of Net2, the unique goal of Net3 was announced—engaging communities of color—and Future Search methodology was announced as the program plan for developing strategies to engage communities of color. Cluster members expressed considerable confusion on a variety of issues and at different levels concerning the methodology and the intended outcomes. A number of questions remained unresolved as Net2 concluded. Telephone interviews with cluster members following the meeting clarified the issues and prompted a redesign of the Net3 program focused on content rather than process. Members wanted useful, applicable, data-driven information about communities of color as opposed to an opportunity to engage in the Future Search process.

Workshop and general session topics included: changing national demographics, race/gender, relationship marketing, board/staff diversity, online engagement, and researching/engaging donors of color.

Construction Crews: In response to cluster member feedback, the planning team developed a small group programmatic structure, dubbed “Construction Crews.” The crews coalesced around specific topics but members were free to extend their discussion to other topics of interest to the crew. The meeting schedule agenda included time for construction crews to meet.

Venture Fund: The third venture fund, Venture Fund for Continued Connecting, was offered to cluster members who wanted to continue building a shared knowledge base and relationships within the Tools cluster. Options for using venture funds included continuing work from previous venture funds, developing joint proposals with other Tools members for new collaborative activities, attending the American Marketing Association 2004 Nonprofit Marketing Conference, and/or attending the Association of Small Foundations 2004 Annual conference.

An Out-of-the-Park Home Run: Arguably, the most memorable event of all five networking meetings was an off-site dinner held at a community performing arts venue in East Philadelphia. The menu and entertainment represented the cultural and ethnic diversity of the neighborhood. [insert something more about the menu and music?]. By the fourth musical ensemble of the evening, clapping and toe-tapping cluster members could no longer contain their enthusiastic response to the music. Following the lead of a couple members, soon virtually every person in the room joined in dancing. Members later said, “It was an out-of-the park home run.”

Speakers:

Martha Farnsworth Riche – President, Farnsworth Riche Associates

Juan Johnson – Vice President, Coca Cola Company

Alfred Ramirez – Senior Consultant, Policy and Outreach, Maya Advertising & Communications

Berit Lakey – Senior Consultant, Boardsource

Randal Pinkett – President and CEO, BCT Partners

Jessica Chao – Principal, Chao and Associates

Eugene Miller – Assistant Director of the Center on Philanthropy and Civil Society, City University of New York

Felinda Mottino – Senior Fellow at the Center on Philanthropy and Civil Society, City University of New York

Erica Hunt – Executive Director, The Twenty-First Century Foundation

Net4 – December 2004, Tempe, AZ

Unique Goal: At Net3, cluster members learned that Net4 would be the last networking meeting in the series. Consequently, the unique goal of Net4 included a celebration of the achievements of the Tools cluster and developing strategies to strengthen relationships with other organizations. The workshop structure of previous networking meetings was replaced by general sessions on alliance strategy, scenario planning, and negotiation/deal-making.

Speed Dating: One of the evening meals featured a variation of speed-dating. For each course of the meal (appetizer, salad, entrée, and dessert), members switched to a different table with different organizations to exchange information on what they needed from others and what they had to offer others. The objective was for cluster members to think about how to help each other.

Reflections: A reflection session at the end of Net4 presented an opportunity for foundation staff and cluster members to talk about the learning, networking, and partnering that occurred because of the meetings. WKKF Vice President Bob Long closed the session saying that the Foundation had made an investment in the skills and leadership capacities of the individual cluster members. He challenged everyone to “make a difference in the sector.”

Tools Fair: In conjunction with Net4, Tools cluster members were invited to participate in a local “nonprofit day” program, hosted by the Arizona State University Center for Nonprofit Leadership and Management. Members set up displays and marketed their products and services to Phoenix-area nonprofits.

Speakers:

Ben Gomes Casseres – Principal, Alliance Strategy Consulting

Andrew Blau – Scenario Practitioner, Global Business Network

Gregory Neidert – President, World of Work, Inc.

Net5 – January 2006, Tempe, AZ

Unique Goal: During all of the previous Tools cluster meetings, members stated they were eager to meet Kellogg grantees outside of the Tools cluster for marketing and product research purposes. A networking meeting of another group of Kellogg grantees presented such an opportunity. Though most Tools grants had ended by this time, Tools cluster members enthusiastically attended this extra Net5 meeting. Additionally, Net5 provided an unexpected opportunity to collect further cluster-level evaluation data.

Cross-Cluster Connecting and Venture Fund: While the two clusters came together for separate purposes, were at very different places in their development as clusters, and followed separate schedules, the program offered several cross-cluster connecting opportunities. The most memorable opportunity was a marketplace fiesta, where Tools cluster members and Cultures of Giving cluster members displayed information about their organizations. Music, food, decorations, and refreshments made the atmosphere festive and relaxing and gave members of both clusters the opportunity to stroll through the marketplace, talk with one another, and sow the seeds for future organizational relationships. WKKF also took the opportunity to “grease the wheels” by offering a fourth venture fund (Venture Fund for Cross-Cluster Connecting) to foster partnering activities among Tools and Cultures of Giving cluster organizations.

APPENDIX C: Reports and Communication Products

All of the items listed in this Appendix are available from CenterPoint Institute upon request.

Tools Cluster Reports and Papers

Net1: evaluation report

Net1 synthesized report: Rolling Up Our Sleeves

Net2: evaluation report

Net2 synthesized report: Sharpening Our Tools

Net3: evaluation report

Net3 synthesized report: Sharing and Using our Tools in Diverse Communities

Net4: evaluation report

Six Cluster Evaluation Reports: October 2003, March 2004, September 2004, April 2005, October 2005, February 2007

Four Venture Fund Reports: Venture Fund for Learning and Collaboration, Venture Fund for Engaging Communities of Color, Venture Fund for Continued Connecting, and Venture Fund for Cross-Cluster Connecting.

What is a Community of Practice? A strategy for achieving desired outcomes in the Build Tools for Nonprofit Sustainability and Innovative Giving Cluster.

Organization Profiles created for Net1 and updated for each subsequent networking meeting, including members' photos.

Tools Cluster Newsletters

Newsletters

Tools News V1N1 – April 2006

Tools News V1N2 – May/June 2006

Tools News V1N3 – Aug/Sept 2006

Other Communication Products

Scope of Work 4-color Document

Program Echoes

APPENDIX D: Glossary of Terms

Approach: In the Unleashing New Resources initiative there are three “programming approaches.” An approach is a funding stream focus—a way to think about and organize grantmaking in the initiative.

Cluster: A group of grants addressing a common issue related to a program area approach. The “Tools Cluster” addresses the issue of “Building Tools for Nonprofit Sustainability and Innovative Giving” within the Unleashing New Resources initiative.

Initiative: A multi-year, multi-phased set of programming activities, targeted to impact social systems change, in alignment with WKKF mission and priorities. The Initiative is a deliberate and significant investment of WKKF resources designed to create a desired change by integrating selected stakeholders, stimulating synergy among them, and leveraging their collective knowledge and capacity.

Intermediary: An organization through which the Kellogg Foundation carries out various leadership and organizational support activities for grants and for the foundation itself.

Net1, Net2, Net3, Net4, Net5: Shorthand for the Tools cluster networking meetings. Net1: Tempe, AZ March 24 – 26, 2003.

Net2: Tempe, AZ October 28 – 30, 2003.

Net3: Philadelphia, PA March 23 – 25, 2004.

Net4: Tempe, AZ November 30 – December 2, 2004.

Net5: Tempe, AZ January 23 – 26, 2006.

Organization Profiles: Short, written summaries that provide an overview of organizations in the cluster. The purpose for organization profiles is to help members get acquainted with others in the cluster.

Sustainability: The grantee, community, or other beneficiary’s ability to continue the work that was funded in a self-renewing manner after WKKF funding ceases.

Tools, Tools Cluster: Shorthand for the group of organizations within the “Build Tools for Nonprofit Sustainability and Innovative Giving” approach.

Unleashing New Resources: Title of the P&V initiative whose purpose is to strengthen and connect new leaders, donors, and emerging forms of philanthropy and volunteerism. It is focused on building, identifying, and advancing new and creative approaches that stimulate people and organizations to give time, money, and know-how.

Venture Fund: Small grants made available to members of the Tools cluster to complete focused projects that promote learning and advance the goals of the cluster. The first venture fund supported learning and partnering among cluster members; the second supported activities to increase Tools organizations’ ability to serve the needs of communities of color, involve them in programs and services, and include them in decision-making and leadership roles; the third venture fund supported continued connecting among Tools organizations; the fourth fostered partnering activities among cluster organizations; and the fifth supported cross-cluster collaborative activities with one or more organizations in the other cluster.