



Greater Milwaukee Foundation:

# Built for Leadership

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*Under the banner of community leadership, a growing number of community foundations are fundamentally re-framing their organizations and re-shaping how they interact with their communities. Their end goal is a more robust and inclusive civic sector with enhanced problem-solving capabilities. This working paper focuses on one community foundation, the dramatic changes it has made, and the challenges that lie ahead.*

In 2005, the Greater Milwaukee Foundation (GMF) decided to make the leap from “good to great” inspired by the book of the same name.<sup>1</sup> By any yardstick, GMF was an exemplary community foundation prior to 2005. It had invested serious time and money in minority neighborhoods. It was an early proponent of positive youth development. It had listened to the community by convening, conducting focus groups, and interviewing both service providers and service recipients. It had looked beyond the community to identify, import, and adapt innovative programs. It had provided the glue for many partnerships and funder collaboratives by loaning senior staff and serving as fiscal agent. It had been thoughtfully opportunistic by participating in national foundation initiatives that have leveraged intellectual and financial resources to address tough local issues. It had commissioned independent research to obtain objective data on specific issues and gain a more nuanced understanding of how its community is changing. Its assets are growing.

What could possibly be wrong with this picture? Arguably, nothing. That, in short, is why it is so difficult to fix the coordinates on community leadership. What is dispositive and differentiates community foundations focused on community leadership are:

- the passion and will to create impact beyond the walls of the foundation, not in terms of a single initiative, but on a solid majority of what the foundation, in the aggregate, does; and
- the conviction that community leadership is as good for the community foundation as it is for the community it serves.

These two factors change how a community foundation goes about its business and, on a more

fundamental level, change what its business is.

Foundation President Doug Jansson readily acknowledges that community leadership has always been in the mix, but that Collins’ book led them to the realization that it was “at the core of what we can do best.” Although the Foundation has an enviable \$9 million per year to fund discretionary grants, “that’s not going to solve anything we care deeply about,” said Jansson. “Shifting from an initiative mentality to a leadership mindset has caused us to focus less on exit strategies and more on how we can produce long-term change on issues that matter.” One of the “aha” moments for the foundation was the realization that “anyone with a good staff and board can be good at grantmaking. Our distinct advantage, our ability to make a difference, lies in all of the things we can do in addition to grantmaking,” he noted. Once the Foundation achieved clarity on the centrality of leadership to its identity, Jansson said, “we were able to articulate that we want to be known for the ability to marshal the leadership and resources to solve problems; as the go-to place on community issues; as best in class on donor services; and as stellar stewards of donor resources.”

## Good to Great Strategic Plan

The sea change at the Foundation started with a **strategic plan** adopted by the board in December 2005. The Foundation framed three goals in terms of where it believes its potential for greatness lies:

- providing leadership to improve the community;
- expanding the philanthropic vision and impact of its donors; and
- honoring donor intent while ensuring that each donor’s fund has enduring community impact.

Interestingly, community leadership is implicated in all three “great” categories. The first is a more forthright statement of community leadership, but the second two make explicit reference to impact – the ultimate objective of community leadership. In other words, these are mutually reinforcing goals which, if achieved, will dramatically increase the

- 2 • Good to Great Strategic Plan
- 3 • Changing the Board
- 4 • Operating from a Values Base
  - Aligning Staff
- 5 • Creating the Physical Environment
  - Engaging Donors and Other Co-Investors
  - Using Technology as a Leadership Tool
- 7 • Funding Community Leadership
  - Picking Issues
- 8 • Increasing Impact
- 10 • Determining What’s Got To Go
  - Conclusion

1. Jim Collins, *Good to Great: Why Some Companies Make the Leap...And Others Don't* (New York: HarperCollins, 2001).

Foundation's capacity to exercise leadership on a sustainable basis.

The structure of the plan is crisp and precise. Each of the three goals has a section that describes:

- the passion that inspired selection of the goal;
- the strategic components of the goal;
- measures of success; and
- what will change as the goal is implemented.

Each goal section concludes with a two-column chart that has the rationale for the goal on one side and examples of existing activities that illustrate the goal on the other. Foundation staff spent a year in the **Good to Great** planning process then focused on **metrics**. Some of the key metrics the Foundation adopted include:

- Allocate one-half to two-thirds of the Foundation's discretionary grant dollars to support "strategic leadership" grant programs (measured annually).
- Leverage three dollars in co-investments for every discretionary dollar allocated to leadership programs (measured annually).
- Demonstrate the effectiveness of leadership initiatives with formal evaluations appropriate to their stage of development (measured annually).
- Ensure that 95 percent of donors, prospective donors, and intermediaries view the Foundation as a philanthropic leader in the community (measured via telephone survey every three years).

Of the four metrics listed above, Jansson notes that the first has proven the most difficult. "While we now have a portfolio of 13 active leadership grants, we're still allocating only one-quarter of our discretionary grant dollars to these projects. We really underestimated the amount of staff time and effort required to build the portfolio. On the positive side, we also underestimated the level of co-investments we could generate – about \$4.50 for every dollar of discretionary funds we've invested."

### Changing the Board

In retrospect, Jansson would have brought the board in earlier. "We can't do the things we want to do without board support. Historically, our board was predominantly white, came from the business community, and focused primarily on asset

development and responsive grantmaking. Now its focus is on our impact in the community," he said. "The board hasn't abandoned its historic roles, but is comfortable blending donor development, convening, public policy, and leadership," he added.

Not only is the board intentionally more racially diverse than in the past, the backgrounds, skill sets, and life experiences of its members are different as well. "I am currently one of the longest serving board members, with another year left on my term," notes Joan Prince, Vice Chancellor at the University of Wisconsin-Milwaukee. "The composition of race, gender, and community knowledge on the board has changed dramatically over the past decade, in direct alignment with how we fund, who we fund, and where we as a board and staff have determined is the hope for the greater impact," she said. Adds Jansson, "we now have more board members with public as well as private sector experience," noting that the new composition has made the board both more conversant and more comfortable with public policy issues. In keeping with its emphasis on community leadership, board meetings themselves have changed: a quarter to a third of each meeting is now spent on a substantive issue, often with outside experts making presentations.

These changes have had ripple effects throughout the Foundation. In perhaps the most pronounced shift, the board recently changed GMF's mission from "helping donors make a difference" to "strengthening communities through effective partnerships." Even more telling, the Foundation's new vision statement describes GMF as "an effective partner that develops, supports, and advocates for projects, programs, and policy changes that strengthen communities in measurable and sustainable ways." More subtle, but no less profound, is a conscious effort to include new voices in community conversations. Jansson noted that while the Foundation has a long history of convening, the faces around the table were familiar and predictable. Now when the Foundation convenes, if the issue is crime reduction, it is more likely that

- 2 • Good to Great Strategic Plan
- 3 • Changing the Board
- 4 • Operating from a Values Base
  - Aligning Staff
- 5 • Creating the Physical Environment
  - Engaging Donors and Other Co-Investors
  - Using Technology as a Leadership Tool
- 7 • Funding Community Leadership
  - Picking Issues
- 8 • Increasing Impact
- 10 • Determining What's Got To Go
  - Conclusion

young people on probation for gun violence will be at the table with elected officials and other stakeholders. “Leadership is beginning to affect what the board thinks about,” says Jansson, “and when I step down, I expect there will be more emphasis on hiring a leader than a fundraiser.”

### Operating from a Values Base

The Foundation is guided by a simple set of values which, as Collins states, are “not to be compromised for financial gain or short-term expediency”:<sup>2</sup>

- Integrity
- Effectiveness
- Respect
- Transparency
- Innovation
- Diversity
- Equity
- Inclusiveness
- Collaboration

Operationalizing values is invariably more challenging than articulating them, particularly values related to diversity, equity, and inclusion. In one of its first actions, the Foundation created cross-departmental teams to embed diversity as a conscious commitment and practice. One result is that there are now diversity-specific annual goals for the Foundation and each department. For example, a current goal for the Communications Department is to have at least 10 percent of the attendees at the Foundation’s annual meeting and at its “prospect cultivation” event be people of color.

Although Milwaukee has many communities of color and is now a majority-minority city, a Foundation analysis revealed that many area nonprofits serving diverse populations had few board members of color. Treading lightly, GMF simply started asking every grant applicant what percentage of its board members are African-American, Hispanic, or Asian. Then the Foundation began routinely deferring action on applications from nonprofits serving diverse populations that have 10 percent or fewer minority board members. When funders change behavior, fund seekers take notice. Today, GMF can point to many instances where its actions have resulted in greater board diversity.

Increasing its own staff diversity, and improving the cultural competency of existing staff, are also priorities. The Foundation requires that qualified applicants of color be recruited and interviewed for all job openings before a position is filled. In recent years, it has expanded diversity in its Program Department and achieved diversity for the first time in the Donor Relations, Development, and Communications departments. Senior staff participated in two trainings on race and racism in 2008, and staff members are supported in attending performances and events that increase their understanding of different cultures and ethnicities. “We recognized at the outset that the Foundation could not credibly convene diverse stakeholders around community issues unless we ourselves had a diverse staff and board. Embracing diversity was first and foremost about organizational effectiveness,” Jansson said.

### Aligning Staff

Community leadership Milwaukee-style is staff intensive. “We’re working more and more across departments,” says Jim Marks, Vice President and Director of Grant Programs. When grants are being discussed, Communications and Donor Services staff members are in the room, as is the Director of Community Partnerships.

At the same time that people are working more closely across departmental lines, the emphasis on co-investment caused the Foundation to split development and donor services into separate departments. In the Foundation’s view, serving current donors and landing prospective donors require distinctly different approaches and skill sets. “Serving donors has become very complicated because now it’s about donor engagement and co-investment. You have to be wonderful at building relationships with donors, attuned to their charitable interests, able to excite them about new opportunities – and at the same time knowledgeable enough about the programs we fund to take donors to see them,” says Jansson.

- 2 • Good to Great Strategic Plan
- 3 • Changing the Board
- 4 • Operating from a Values Base
  - Aligning Staff
- 5 • Creating the Physical Environment
  - Engaging Donors and Other Co-Investors
  - Using Technology as a Leadership Tool
- 7 • Funding Community Leadership
  - Picking Issues
- 8 • Increasing Impact
- 10 • Determining What’s Got To Go
  - Conclusion

## Creating the Physical Environment

The Greater Milwaukee Foundation moved to a new home in April 2009. Having outgrown its former space, the Foundation spent more than a year seeking new space with a laser beam on community leadership. “How do you walk into a space and *immediately* know you’re welcome?” asks Doug Jansson. More space for convening, plenty of free parking for guests, and an open floor plan to promote staff collaboration are among the considerations that influenced the final decision. “We have to erase physical barriers and status symbols such as who has a window or a private office,” says Jansson. “All of us have to feel we’re in the same boat and that no one can succeed without the support of other staff members.” The new site, located in the historic Schlitz Park business complex, has space for meetings of up to 75 people, an open commons with interesting meeting possibilities, easy access from the interstate, lots of free parking and, unlike the current site, all staff will be located on the same floor.

## Engaging Donors and Other Co-Investors

“Leadership and co-investment are symbiotic,” Jansson says. “If we’re seen as a community leader and provide donors with exciting co-investment opportunities, they’ll give more; with more resources, we can do more community leadership.” “While the concept is simple,” notes board member Prince, “the feeling of ownership by our donors is powerful.” The Foundation views co-investment as a multi-pronged strategy that (a) builds and solidifies relationships throughout the community, (b) strengthens the Foundation’s reputation as a philanthropic leader, (c) increases the number of people and institutions involved in and knowledgeable about an issue, and (d) increases the potential magnitude and sustainability of impact.

The Foundation surveyed its donor advisors in 2005 and again in 2008 and discovered from respondents that:

- 74% ranked receiving information on area nonprofits as important;
- 73% ranked receiving information about community issues and needs as important;
- 57% would like to learn about new programs to address emerging community needs; and

- 53% ranked grantmaking advice and assistance as important.

Of even greater significance, there was a tremendous convergence on the issues that board, staff, and donors cared about: education, children and families, and persistent poverty. “If board, staff, and donors all think the same things are important, shame on us if we don’t figure out how to engage our donors as co-investors – all the more so when we distribute twice as much annually in grant dollars from our donor advised funds as we do from our discretionary grant funds,” Jansson said.

The Foundation defines an engaged donor by one of three primary criteria. The donor has (a) already co-invested \$1,000 or more, (b) informed the Foundation of a deferred gift, or (c) provided a prospect referral or cultivated other donors. Donors are also classified as engaged if they satisfy three of five secondary criteria, which include attending Foundation events, using online resources for research or grantmaking, adding to their funds, and accessing staff for grant-making or estate planning advice. By the end of 2008, 65 percent of the donors the Foundation has targeted to engage were engaged based upon these criteria. From 2005 through 2008, the Foundation secured \$3 million in co-investments from donor advisors and \$24.5 million in co-investments from private foundations, corporations, and government agencies.

## Using Technology as a Leadership Tool

Although purchased before its **Good to Great** epiphany, the Foundation has a versatile technology platform, Dotche, that Jansson describes as “a perfect fit. It provides for online grantmaking and gives donors robust information and functionality in line with our goal of being the go-to place on information about our community.” Donors had input in system design, and each donor’s areas of interest are coded either after a discussion with the donor or a review of previous grants made. “The whole intent was to give donors information on nonprofit agencies,

- 2 • Good to Great Strategic Plan
- 3 • Changing the Board
- 4 • Operating from a Values Base
  - Aligning Staff
- 5 • Creating the Physical Environment
  - Engaging Donors and Other Co-Investors
  - Using Technology as a Leadership Tool
- 7 • Funding Community Leadership
  - Picking Issues
- 8 • Increasing Impact
- 10 • Determining What’s Got To Go
  - Conclusion

community issues, and co-investment opportunities they couldn't get anywhere else," says Denise Calloway, Director of Communications.

Research on local issues used to be password protected but is now accessible to the general public and has evolved into 20 issue areas ranging from early childhood development to water quality. In each of these areas, it is possible to view both national and local research, to dive deeper on any topic with the click of a mouse, and to learn about exemplary programs and organizations the Foundation has funded dealing with that topic (see **Assets sidebar below**). This section of the Foundation's website (<http://www.greatermilwaukeefoundation.org/research/>) has been developed in collaboration with the University of Wisconsin-Milwaukee's Center for Urban Research. The Center's role is to compile local data and prepare an overview of each issue. The Foundation then identifies exemplary programs that are addressing the issue and provides links to more information about those programs.

For those who would rather snorkel than dive deep, the Foundation launched a bimonthly newsletter, *BranchingOut*, (<http://www.greatermilwaukeefoundation.org/donors/>)

([branchingout.shtml](#)), in June 2006. Jansson and his senior staff concur that hiring a journalist to visit grantees and write short, compelling stories about their programs was a stroke of genius. Available in both print (when requested) and electronic forms, *BranchingOut* puts a human face on Foundation-funded programs and identifies specific funding needs, e.g., "\$800 for two lunar magnifiers" for a program serving the visually impaired. Every issue of *BranchingOut* features a story about one of the Foundation's leadership projects, as well as descriptions of five or six other projects, thus encouraging co-investment by smaller donors who may not receive personal calls and visits from staff. To date, 110 programs have been featured in *BranchingOut*.

In June 2007, *BranchingOut* became customized for donors while at the same time keeping leadership projects at the fore. Donors who log-on to

- 2 • Good to Great Strategic Plan
- 3 • Changing the Board
- 4 • Operating from a Values Base
  - Aligning Staff
- 5 • Creating the Physical Environment
  - Engaging Donors and Other Co-Investors
  - Using Technology as a Leadership Tool
- 7 • Funding Community Leadership
  - Picking Issues
- 8 • Increasing Impact
- 10 • Determining What's Got To Go
  - Conclusion

## Increasing Assets for the Working Poor

The Greater Milwaukee Foundation has a long history of convening for results, and an increasingly sharper focus on persistent poverty as a Foundation priority. This led GMF to convene the Social Development Commission, the Milwaukee Health Department, the Milwaukee Asset Building Coalition, and the Badger Care Network in 2003 to discuss the federal Earned Income Tax Credit (EITC). This tax credit for low wage workers is underutilized in many communities, leaving substantial sums of money "on the table" that could be benefiting individuals and families, as well as re-circulating throughout the local economy.

Although a number of groups were already engaged on this issue, the convening resulted in the creation of "Super Sites" where, in addition to free tax preparation and filing services, eligible individuals can be enrolled in other programs such as health care and food stamps. Individuals are also encouraged to open bank and savings accounts at the sites and receive counseling to discourage utilization of services offered by predatory lenders such as payday loans, check cashing, and refund anticipation loans. In its first year, 4,431 returns were completed at Super Sites, producing more than \$2.3 million in tax credits and \$3.2 million in refunds. Six years later, in 2008, the Super Sites accounted for nearly 7,140 returns generating more than \$8 million in tax credits, \$11.1 million in total refunds and \$4.8 million in economic stimulus payments. Moreover, the Super Sites were responsible for opening 718 new bank accounts and setting up more than 3,400 direct deposits.

The Foundation exported this extraordinarily successful program to neighboring Waukesha County in 2006 and has added Ways to Work, a program that provides low-cost financing to help families with auto repair or replacement.

*BranchingOut* initially see a leadership project story, but the remaining stories relate only to programs that match their coded interests. Donors may also change their interest areas online or by contacting their Donor Services Officer. A more recent innovation is special editions of *BranchingOut* that focus on one topic only, such as emergency food and shelter programs, exposing donors to a broad array of programs while at the same time broadening their understanding of multi-faceted issues. In 2008 alone, the Foundation has documented \$261,000 in co-investments in projects from donor advisors after they were featured in *BranchingOut*.

The Foundation also maintains detailed profiles of more than 700 area nonprofits. It had limited success in securing nonprofit profiles with “the carrot that donors will see your information if you put it online,” said Craig Nuechterlein, Director of Operations. “The stick – you can’t get a grant from the Greater Milwaukee Foundation without a profile online – worked.” Donors can make grant recommendations directly through the Foundation’s Philanthropy Online portal. As donors browse the topics included in the research/exemplary programs section of the website, links to Foundation-funded organizations and programs are liberally sprinkled throughout, thus facilitating co-investment in particular, and more informed decision-making in general.

“Since we redesigned the website after focus groups with donors in 2008, we’ve had an 11 percent increase in visits,” said communications director Calloway. In an early affirmation of the site’s utility, a few weeks after the “leadership page” ([http://www.greatermilwaukeefoundation.org/leadership/leadership\\_grants.shtml](http://www.greatermilwaukeefoundation.org/leadership/leadership_grants.shtml)) went up on the website, a donor contributed \$10,000 to Sponsor-A-Scholar, one of the first leadership grant programs.

### Funding Community Leadership

“Because our leadership work is labor intensive, we decided to create an endowment called the Leadership Fund, and set a goal of five million by 2015. We didn’t want to raise funds annually other than by asking current and former board members to make an annual contribution of \$1,000 to \$5,000, though there have been some surprising gifts, including a decision by a former board chair to leave his IRA to the Leadership Fund,” Jansson said. The Foundation opted instead to build the

endowment by taking the first 12 months of administrative fee revenue from all new funds and bequests. Until the goal is reached, leadership efforts will be funded out of current income, after which the endowment will yield about \$250,000 per year for leadership activities.

### Picking Issues

The threshold question for the Foundation is “whether our involvement is essential to success,” says program vice president Marks. Ideas can come from anywhere, such as donor Dick Paddock’s dream to acquire a 640 acre-block of rapidly-appreciating land that spanned two counties, restore it to the condition in which it existed in the 1830s, and turn it into a nature preserve, a dream that the Foundation continues to pursue although the donor is no longer alive to bring it to fruition. Or, the impetus may come from Foundation staff and require persuading a skeptical board to get onboard. Such was the case with Mosaic Partnerships, a program that involves one-on-one pairing of people of different races and ethnicities, with structured and unstructured activities over the course of a year (**see Mosaic sidebar page 8**). Before seeking board approval, co-investors from the Foundation’s own donors were secured, a few inside-the-board advocates were identified, and individual meetings were held with each board member. “While the process of selecting critical issues and initiatives to fund such as Mosaic Partnerships was intensive, it was also imperative not to forget to have the discussion of who actually ‘owns’ the initiative long term – the foundation or a community partner,” notes board member Prince. “To be an ethical partner in funding such programs, we, as a board and foundation have learned to be very diligent in not just focusing on the grantmaking side, but working with co-investors to determine the long-term replicability and permanent home for the project.”

Those activities in which the Foundation takes a deeply personal interest came to be known as “leadership projects.” **Criteria for “leadership projects”** came early in the process. In almost all

- 2 • Good to Great Strategic Plan
- 3 • Changing the Board
- 4 • Operating from a Values Base
  - Aligning Staff
- 5 • Creating the Physical Environment
  - Engaging Donors and Other Co-Investors
  - Using Technology as a Leadership Tool
- 7 • Funding Community Leadership
  - Picking Issues
- 8 • Increasing Impact
- 10 • Determining What’s Got To Go
  - Conclusion

leadership projects, Foundation staff members serve on steering committees and other governing bodies. It is worth noting that very few of today's leadership projects were initiated under that moniker. Some simply pre-date the Foundation's shift to a primary focus on community leadership and the development of assessment criteria. The potential of many others, however, was not apparent until the Foundation had developed a multi-year relationship with the grantee. There may be a "chicken or the egg" issue on the majority of leadership projects to date: did the Foundation build the capacity of promising projects to the point where they fit the criteria or did Foundation staff gain insights over the course of multi-year relationships that led to new understandings about the projects' potential? The lesson for the field may be to start with what is already known about current and past grantees.

"Leadership grants helped us understand how we can do so much more when we combine our money and our convening with those sharing the same concerns. We're now at a point where people

feel good about the direction, but we want to go to the next level – what we can do beyond leadership grants," Jansson said.

### Increasing Impact

The Foundation is well on its way to the next level. The board reached consensus at a retreat two years ago that many of the issues pivotal to Milwaukee's future, such as low graduation rates from the city's public schools, cannot be resolved with grant dollars alone. After the Board Chair and Vice Chair visited The Boston Foundation to examine its approach to community leadership, it was agreed that GMF would focus in a more concerted and deliberative fashion on three key activities:

- Commission research on selected community issues, particularly when the dearth of objective

- 2 • Good to Great Strategic Plan
- 3 • Changing the Board
- 4 • Operating from a Values Base
  - Aligning Staff
- 5 • Creating the Physical Environment
  - Engaging Donors and Other Co-Investors
  - Using Technology as a Leadership Tool
- 7 • Funding Community Leadership
  - Picking Issues
- 8 • Increasing Impact
- 10 • Determining What's Got To Go
  - Conclusion

### Mosaic Partnerships

Race remains a volatile topic in America, and the landscape is littered with failed efforts to improve race relations. Milwaukee, one of the country's most segregated cities, is no exception. In 2006, GMF took a calculated risk on Mosaic Partnerships, a program pioneered in Rochester, NY to counter racism and promote cultural understanding. Mosaic pairs community leaders of different races using an online survey to identify intersecting interests. Over a nine month period, partners meet informally each month at a time and place of their choosing, and six times for small group discussions. Small group topics are as wide ranging as advice African American parents give their children if stopped by the police to Wisconsin's proposed marriage amendment.

The premise is that individuals will be changed by the inter-racial relationships they form, and that those relationships will eventually lead to more systemic forms of change. "Unless you get enough community leaders beginning to have conversations regarding race relations, as well as building a Rolodex so they begin to have trusted relationships across race, you can't really change race relations in a city like Milwaukee," says Foundation President Doug Jansson.

From 2006 through 2008, 538 people have participated in Mosaic and an independent evaluation is underway. Anecdotal evidence is promising. Jansson introduced his partner, a vice president at Aurora St. Luke's Medical Center, to the notion of making the hospital a mobile site for the Earned Income Tax Credit, a program that puts cash in the pockets of the working poor and which enjoys significant foundation backing. Another partner collaboration led to the addition of stepping, an African American dance form, to the Marcus Center for the Performing Arts' "Get Up & Dance" series in 2007.

The Foundation expects to continue Mosaic for a fourth and fifth year, although there is concern that the current economic climate may negatively impact the ability of some funding partners to contribute at desired levels. There is also a strong interest in providing programs for Mosaic alumnae.

information inhibits an informed community discussion of public policy choices.

- Convene stakeholders around community issues.
- On selected issues, support advocacy efforts for public policy or programmatic changes.

To initiate, coordinate, and oversee these activities, the Foundation hired Marcus White in June 2008 to head a newly-created Department of Community Partnerships. In his first six months on the job, White had one-on-one interviews with approximately 150 community leaders, asking them to identify the three or four most important things that need to be addressed now to ensure a prosperous future. “People often lament the lack of vision in Milwaukee,” White said. “We don’t have much conversation about where we want to be ten or fifteen years down the road.” Jansson adds, however, that in his periodic visits with donors “there’s a growing sense of urgency in Milwaukee that much more must be done to tackle today’s issues more effectively or the future won’t be as rosy as the past.”

Soliciting information and opinions was only part of GMF’s agenda. Equally important was the opportunity to sow the seeds for future collaboration by introducing community leaders to the Foundation’s interest in playing a more active civic role that includes venturing into public policy. White says they were “fairly strategic” about whom to contact and in what order, with the Mayor topping the list. It is worth noting that all GMF board members were interviewed as well. The largest group interviewed came from nonprofits (including philanthropies and higher education), about 25 percent were business leaders, and about 25 percent were public officials ranging from school board members to members of Congress. There was broad consensus, regardless of race or sector, on four issues that need to be addressed:

- education, with a particular focus on improving Milwaukee public schools;
- economic development/job creation;
- early childhood education; and
- public transit, including improving the local bus system and rail transportation to connect Milwaukee, Chicago, and Madison.

According to Jansson, “the real test for our board will be when we advocate for the Foundation to take a position on a public policy issue, and that time may

be just around the corner.”

As White was in the thick of the interview process last fall, the notion of the Mayor taking over Milwaukee public schools as a part of the solution to a troubled system gained considerable traction. The ascension of this issue on the public agenda caused the Foundation to commission a study that examined five communities similar to

Milwaukee. The ensuing report focuses on the following questions:

- “To what extent has governance reform in large, urban public school districts resulted in better student performance, greater accountability, and more educational innovation?”
- When a school district is governed by a mayor, do the district’s fortunes improve?”<sup>3</sup>

In the face of resistance and praise in roughly equal measure, the Foundation did not equivocate on whether to publicize the report. Foundation leaders discussed the report with the editorial board of the newspaper, which resulted in an editorial the following Sunday. In conjunction with Marquette Law School, the Foundation hosted a public forum featuring local leaders, including the school superintendent, the president of the Milwaukee Common Council, the president of the teacher’s union, a member of the school board, and three community education advocates. The forum was subsequently broadcast on the local public television station. The report itself does not make recommendations but serves to highlight the many variables at play and the long-term nature of urban public school reform. “There is incredible interest in not only what is happening academically in the Milwaukee Public Schools, but who is running the school district,” said Jansson. “As this issue gains more and more public attention, we felt it was critically important for the community to know what’s taking place in other cities where there’s been a transition from an elected board to another form of governance.”

The Foundation’s action, undoubtedly not its last on the hot button topic of public education, is consistent with its commitment to “conduct research

- 2 • Good to Great Strategic Plan
- 3 • Changing the Board
- 4 • Operating from a Values Base
  - Aligning Staff
- 5 • Creating the Physical Environment
  - Engaging Donors and Other Co-Investors
  - Using Technology as a Leadership Tool
- 7 • Funding Community Leadership
  - Picking Issues
- 8 • Increasing Impact
- 10 • Determining What’s Got To Go
  - Conclusion

on pressing or emerging community issues.”<sup>4</sup> In fact, the cornerstones of the newly-created Department of Community Partnerships are research, convening, and coalitions. This is less a new direction for the Foundation than it is the culmination of what has been learned over the last two decades. “With our poverty grants, we have seen the incredible need that there is out there,” said Judy Jorgenson, the Foundation’s board chair. “We have become even more cognizant of what is going on in the community and all of the things people are hoping to get done. Nobody is going to accomplish all of this alone.”

Adds Jansson, “it really requires thinking about philanthropy differently. It requires getting engaged in public policy and organizing the community around issues to take required action.” Jansson cites a recent example where, in response to the current recession, the Foundation provided large unrestricted grants to several agencies that provide emergency assistance to local food pantries. While laudable, he notes that the more compelling need is to reform the way the county manages the food stamp program. “The program is chronically understaffed so that applicants face huge delays in getting approved for assistance,” he said. “An advocacy effort to fix this program will have a much greater and more enduring impact on low-income families than our other grants in support of emergency food services.”

### Determining What’s Got To Go

“The hard part in implementing a **Good to Great** strategy is to stop doing things where we’re good, but not great, and that take up a lot of staff time,” says Jansson. Agency endowments are one example. “They’re time consuming, especially to start, so we’ve increased the threshold to \$100,000 and aren’t actively pursuing them.” Another is “funds that raise money – high volume transactions are not what we’re in business to do. Our senior staff meets regularly to review our ‘stop doing’ list. In three to five years, we’ll be a different institution than we are today,” he said.

### Conclusion

The Greater Milwaukee Foundation has heeded the fable of the tortoise and hare. Nearly five years elapsed between the development of the Good to Great strategic plan and the completion of partnership director White’s interviews. Board and staff have had input every inch of the way. For example, the board chair and senior staff participated in interviews of all six finalists for White’s position. “There are no shortcuts,” Jansson says. “Process is as important as substance because change of this magnitude impacts everyone.” Patience is also the byword of the new Department of Community Partnerships. The Foundation is willing to accept the tradeoff of short-term gratification for long-term impact. There is a clear recognition that the time it takes to inform public debate, find common ground among people who not only disagree but sometimes disagreeably, and put in place the many solutions every complex problem requires is measured in years if not decades. It will be worth it, says Jansson, if “in the long-term we’re seen as the place that makes change happen.”

- 2 • Good to Great Strategic Plan
- 3 • Changing the Board
- 4 • Operating from a Values Base
  - Aligning Staff
- 5 • Creating the Physical Environment
  - Engaging Donors and Other Co-Investors
  - Using Technology as a Leadership Tool
- 7 • Funding Community Leadership
  - Picking Issues
- 8 • Increasing Impact
- 10 • Determining What’s Got To Go
  - Conclusion

4. GMF website, Community Partnerships, [http://www.greatermilwaukeefoundation.org/File/pdf/CP/community\\_partnership\\_handout.pdf](http://www.greatermilwaukeefoundation.org/File/pdf/CP/community_partnership_handout.pdf).