



T6. How to FIRE Up an Investment-Worthy Case for Program Support

Tuesday, June 4, 2019
3:30 p.m. - 4:45 p.m.

Moderator:

- Dr. Stacey Bouchet, Products Specialist, National Responsible Fatherhood Clearinghouse, Baltimore, Maryland

Presenter:

- Bernice Sanders Smoot, Founder and President, Saint Wall Street, LLC, St. Petersburg, Florida

Dr. Bouchet: Hi everyone. This session is How to FIRE Up an Investment-Worthy Case for Program Support. I have the sincere pleasure of introducing Bernice Sanders Smoot, Founder and President of Saint Wall Street, LLC. Bernice has led the company for 21 years. She has helped effective human services providers overcome major obstacles to sustainability.

The company's Program Return On Investment (PROI) model features research fact and value-driven methods, metrics and measures that the PROI calculator software communicates as a program's impact value. Her clients are many and have included responsible fatherhood programs as well as other nonprofits, universities, federal and state agencies and corporations. With that, I will turn it over to Bernice.

Bernice Sanders Smoot: Thank you, Stacey. I like to make these sessions fun because at 3:30 in the afternoon, they need to be fun. I have incentives that include my all famous million dollar bills. Don't deposit them anywhere, except in your pocket. I also have a couple of other things that I'd like to offer as we move through.

Before I actually get into the presentation, I want to make sure that I tailored as much as possible to what your needs and interests are. I'd like a show of hands of how many of you are practitioners. If you are an intermediary service provider. If your program budget is under \$1 million a year. If your program is under three years old. Who is a founder program? Any others holding leadership positions in your program? We have a pretty conventional mix here.

I'll start by giving you a little bit of history of Saint Wall Street with respect to responsible fatherhood. In 2008, we were federally contracted by OFA to work particularly with healthy marriage and responsible fatherhood programs. Our charge was to help them understand how to make a case so they would not remain dependent on government dollars.



ADMINISTRATION FOR
CHILDREN & FAMILIES
Office of Family Assistance



National
Responsible
Fatherhood Clearinghouse
fatherhood.gov



Along the way we ended up developing a programmatic model that you'll learn about called Program Return On Investment (PROI); because, the biggest problem that we found was that the responsible fatherhood and healthy marriage programs were not able to demonstrate the value of what they do. The truth of the matter is, fathers have value, especially once they become active in their family's lives. They have tremendous value when they connect to their children and their family's lives. It's very hard sometimes to try to make a value case if the most you can say is we've served X number of fathers or we've touched these many fathers, it doesn't really communicate the significance of the difference you're making.

When we started working on PROI, we had some serious help from people who are far more sophisticated than I am in being able to identify data and calculate that data. Dr. Herbert Baum has been with me since we received that contract in 2008 and we've developed a very sophisticated means of measuring, some of which I'll share with you today.

Is everyone interested in an application for a case for support that might be different than you would think someone would want? Is everyone interested in the case for support to help raise money or in a case for support to build a partnership? Is everyone interested in the case for support to try to influence corporate involvement? Okay, all of the above. I'm going to try to cover as much as I possibly can. There was a report around 2008 titled The One Hundred Billion Dollar Man, put out by the National Fatherhood Initiative, that was the impetus for helping us on this project. When it came out, it had so much information about the value of fathers in it from a federal and state level perspective. We now have a case to make for the value of fatherhood from a more social perspective, corporate perspective, and church perspective.

Today's agenda has been broken into three parts. The first statement is social impacts that benefit children and families are investment worthy.

If your fatherhood program is helping fathers do a better job of connecting to his children and families in measurable ways, he not only feels like he's learned some things, or that you've improved his knowledge, or that he's going to be more active, but that he is more active. He is more connected. He is making a difference in his children's lives. That has a tremendous amount of value.

There are three ideas that I want to emphasize today. The first one is probably going to be one of the biggest ones in the fatherhood field. Trying to do away with old habits because there are new expectations in the market today. We're going to talk about what some of those are and the need to ditch those old habits.

We're also going to look at some of the solutions for making an investment worthy case. Those solutions have been tried by your peers, so I won't be sharing anything that's been developed in





the back of the bus, but it's actually been put to work and utilized. You will want to be able to make a case that there is such great value in the work that you're doing that you want people to come along with you and be a co-investor in that work. That changes the dynamic seriously from thinking about a funder as just a source of money.

For those who may not have thought about it, I like to say all the time, grant makers are not ATMs. Donors are not walking wallets. These are people with whom it becomes very important to have a relationship and to be able to inspire them to want to support the work you do.

Thirdly, we're going to look at what your decision is. Do you really want to double down on doing what you've been doing or do you want to fire up and start doing the things that you need to do if you're serious about getting, and I'm going to put an emphasis on this, a lot more money. Because they are what the people in the private foundation community call go away money.

Go away money is that little bit that they'll give you like \$5,000 and you go back and say, "We got \$5000." That's what they call go away money because they said they will give you that one time and you go away and you don't get to ask again. Sometimes they do that simply because you've persisted or pestered them enough. Sometimes it's because they have \$5,000 that they can stand to get rid of. Sometimes, it's just because they like the way that you look or something that you said, and they have that liberty.

When it comes to really big dollars when they have to write a check they have to account for, then that requires a totally different set of metrics and methods to get that money than just going and saying, we have to meet.

Yesterday, I had the pleasure of interacting with two men; and, because I like to make this session fun, I'm going to do it to you. This is what happens when you meet me and I remember you. Chris and Kenny raise your hands. Chris and Kenny can attest to the fact that we had an interesting conversation out front yesterday afternoon, during which we were talking about the challenges of getting money. I liken the idea to the notion of a courtship. Chris, stand up. Yesterday, he was the man with the million dollars. I walked up to him and my goal was to try to talk him into giving me some money, and the idea of a relationship. Everybody understands relationship, right? You can identify with what I'm about to say and I bet all of you will just take for the door when I say it. I walked up to Chris and I said, "Hey. I understand you got it and I need to pay my rent." It's funny because we all know in the relationship business, you don't get to start a relationship by talking to someone about your needs.

That's typically what fatherhood programs do when they come across an opportunity to speak to someone who has money. You immediately start talking about your program needs. That does not begin to build a relationship. That is just as much of a turnoff to them as it would be if some





woman or man came up to you and thought that because you were given some money, you should meet their needs. We're going to look at a whole different dynamic for being in the business of developing a relationship. Again, questions, comments, interactions, will help you win the million dollar bill. Be motivated.

The first slide is going to share with you the mission disconnect. The word I want you to remember from this session today is relationship, because that's what you're going to learn how to do. You're going to learn the business of developing and building relationships that pay, but you have to start with the emphasis on relationship, and not with the emphasis on pay.

The first thing I'm going to talk about is the typical mission disconnect that nonprofits experience and I've designed this one specific to fathers. In the upper left-hand quadrant, you see the reference to a father's well-being. This is what nonprofits do. It's all about your program in that space, the outcome of which has something to do with personal improvement. Somehow the dad has improved his well-being. He's learned some things. Maybe he's actually getting a job. Maybe he's beginning to get on his feet. Maybe he's not committing crimes. He's made some personal improvements. You're very proud of that as you should be and so is he, as he should be. Then in the bottom right quadrant, you see exactly what foundations are interested in. Foundations are interested in child and family well-being. They're not really interested in whether or not a father personally improves his life. They want to see transformed lives. They want to see economic stability in their family. They want to see reduced poverty. Right there you can begin to see how vastly different your mindset is from the foundation's mindset. If you're going to have a relationship with a large funder, you have to be able to think about and connect to what is important to them in the form of mission. Any questions or comments on that?

Participant: Is there value in trying to educate the foundation about the benefits of father well-being?

Bernice Sanders Smoot: You could try but that's about the same as me trying to make a case to Chris about why he should care about paying my rent. You have to remember that these foundations are established by people who've given very careful thought to the difference they want to make in the community. Their board makes a decision and that's what they want to be about and that's what they're going to be about. Maybe over the course of time, which could mean years and years, there could be a different attitude; but, even if there comes a different attitude, it'll be because this field forces it. It won't be because one day they'll wake up with an epiphany and say, "You know what? We should really think about father well-being." It's not likely to happen. As you probably know, the general feeling in the community is men should pull themselves up by their own bootstraps. It's not going to be likely that that would happen. It's a great concept, but not likely.





Participant: How would you define child and father well-being? Often the father may be a custodial father. He's not in the household, so how are you going to define that a family is doing better?

Bernice Sanders Smoot: You know what? That's a really good question and I hope I'm going to answer it. Here is the next disconnect. I call this one the funding disconnect. This goes along the lines of the little charade I did with Chris. You have nonprofits, in general, in the upper left-hand quadrant who are addressing community needs and they say "I have people I'm helping. I need the money and I want to have the freedom to spend it as I see fit." That means you want a gift. There's no expectation of a return. You just want to be trusted with this money.

Lower right-hand quadrant, we see the feeling of grant makers. They want to see more accountability and the big buzz in the corporate foundation community and among those who are called the big bets investors, also those who get the big long-term money, want to see return on investment. I can't emphasize enough how much they're talking about that in the market space.

If you subscribe to The Chronicle of Philanthropy, or you read Stanford Social Innovation Review. If you are on top of any of the publications that the people who give the money are on top of, this is not new to you. This is what they're very much interested in. They want more accountability.

Even in the recent survey among donors across the nation, not just foundations but individual donors, 80% of them today do not trust nonprofits. How many of you would agree that if you're going to have a relationship, the first thing you have to have is trust?

You have this big gap between what your needs are and what your mindset is, and what the people with money are thinking and expecting. That gap has to close. Before you're going to be effective in any kind of communication with the market, be it grants that you're trying to go after with the grant maker, if you're trying to go after a donor, if you're trying to leverage social media, anything that you're trying to do, you have got to be able to build the relationship before you can have any success.

Next slide. Here we're talking about what it looks like to make an investment worthy case with support. How do you begin building that relationship? I like to call an investment worthy case for support a "value proposition." Just like in the business of dating, I like to describe their poster relationship in three references. There's courtship, hardship, and then there's relationship.

In the courtship phase, you are very busy making that value proposition. If you know she likes flowers, you want to give her flowers. If you know he likes a good meal, you want to fix him a good meal. You're trying to connect to what that individual values. That's that courtship phase





and that's the phase that you're going to have to be in and that's what your case is going to have to do for you. It's going to have to help you court that funder by connecting to what matters to that funder and not using that opportunity to build an incredible relationship to make it all about you. There are three questions that we want to be able to answer in this courtship phase. Who would like to read off those three questions in the dark box?

Participant: The first one is what's the problem specific to your community, relative to co-investors, investor's interest and growth challenge? Number two, are you different and better at solving problems, competitive advantage, value proposition? Number three, where's the proof? Likely cost benefits per key social impact, estimated return on investment, research backed their party validated.

Bernice Sanders Smoot: What you just heard is you have to be able to articulate the problem from the perspective that's important to the funding source. You have to be able to stick to a specific problem in your community. I cannot tell you how many times I've seen nonprofits put out information about what the problem is, and they'll end up talking about everything but the problem. Then when you look at the work that they provide, it's like this much of what they talked about is the problem. If I'm a funder and you're going to tell me that the problem is children don't have shoes and the wife doesn't have food and so on, then you're going to tell me about your fatherhood program. What your fatherhood program does is help me feel good about them, it's like there's no connection.

It can range to a lot of things. You can talk about the rate of poverty in your community. You can talk about the need for jobs in the community. You can talk about all those things. Then, if you say what your fatherhood program does is help men get their feet back on the ground, but there's no connection to how many of them really get jobs, how many of them really get their families out of poverty. How many of them really make the changes that you say are problematic. Then I'm not believing you. The opportunity for trust has just gone straight out the window.

While you think you're building an impressive proposal while throwing all those things in, you're shooting yourself in the foot. I want to challenge you, when you're developing your grand proposals or donor appeals, to try to think like the people you're trying to reach. Do not think like the organization in need. Think like the people you're trying to reach. Don't assume that you can run the game on them because most of them have been doing this a long time, especially if they're attached to the big bucks. They can't be snowed. You can't just throw everything but the kitchen sink in and think that you're making a great case. You're not. You're shooting yourself in the foot. You have to be specific to your community. You have to relate to the co-investor's interest. What are they interested in? They're interested in accountability. They're interested in proof of impact. Impact is not outcomes with a new name. That's the other thing I see that nonprofits do. They started calling outcomes impact. There's a difference between impact and





outcomes. Anybody want to take a gamble for a million dollars and tell me what the difference is between outcomes and impact?

Participant: Impact shows a return on investment.

Bernice Sanders Smoot: Actually, that's a good reference. Impact will evidence somehow. It will link to a return on investment. I think that's a good one. That's worth a million dollars. Anybody else want to take a stab at that one? The difference between outcomes and impact? I mean that's really a great summary.

Participant: I think impact is how it impacted the people right in front of me. Outcomes are sometimes the people in front of me. When I think impact, it is the neighborhood and community.

Bernice Sanders Smoot: You're in the ballpark but not exactly there. Outcomes are often relative to that market that you're serving, where impact will generally extend beyond just him. An outcome might be increased knowledge or the number in attendance. Impact would be the difference that, as a result of participating in your program, he's now making.. The children are doing better in school. Maybe he gets married, where he wasn't before and is now co-parenting, where before they were fighting. That impact has an action that benefits beyond the father. Again, don't think that you're going to pull a fast one over a funder by renaming your outcomes impact.

Participant: We do something called impact report. In there, we tell our county how much money we saved in child support. \$246,000 was paid in child support. We saved the county \$1.4 million in taxpayer dollars by fathers not being incarcerated. That's impact. Then we call something outcome as 44 fathers were employed who came in unemployed. Is that correct?

Bernice Sanders Smoot: Yes. The way you're doing it is good because the impact is actually on the greater community. The fact that the father has a job is personal to him. However, the income that the father makes can become an impact because that income gets to benefit the children and the family. For instance, if he's now actually paying child support because he has a job, then that income, that job is now creating an impact. There is a way in which an outcome can turn into an impact as soon as it begins to benefit the community, beyond the father.

Participant: The question I have is the difference between outcomes and impact. It sounds like to get the true measure of the impact, an organizational program would have to be in existence for a good amount of time to get that information. What can an organization do when they haven't been around that long to make sure that this is going to happen?





Bernice Sanders Smoot: I think that question is going to get you \$1million. When you are a new program and you haven't had the opportunity to create that evidence, what you can consider using is an evidence-based model. When you look at that model, you can also look at the challenge for your community, specific to your community, and through a series of strategic planning activities. Assess the likelihood that your program will create certain impacts using that model. You want to find a model that works. You want to consider its application in your community. Then, you want to make certain impact projections accordingly. Someone give me an example of that. How might that look? You have a program that's under two years old, what would you do?

Participant: I work with a university that has a new 24/7 dad curriculum that we just started using. We would then use evidence of other programs using that same curriculum as it applies to our community. You say dads who have babies less than five years old. We would project to our funders that this is the possibility that can come from the curriculum as we apply it.

Bernice Sanders Smoot: Very well said. He's talking about using a particular curriculum and then pondering the application for his particular program and then considering how you can actually communicate or project the potential for impact based on what has been experienced before. That's actually used a lot in business and in other applications. You just want to be able to use what's already available. Now, here's the important part about making certain too that you consider what is going to be appropriate for your community. One of the organizations that I worked with years ago is based in Baltimore. They had a very popular program. They had a model where dads would come in wearing suits to learn how to get job training. It worked for them because they had ambitions with these men getting jobs in Baltimore City, which is where you want to be able to present in a corporate way.

Then you take that same tactic to a program in West Virginia where the likelihood is the man is going to get a blue-collar job; it's impractical to dress him in a suit. That's a very basic way to look at it. Overall, you want to be able to think logically about the application of an evidence-based practice to your own. Just because it's evidence-based and it worked here for this population, doesn't mean it's going to work for your population and what you do. You have to weigh that out very carefully in your strategic planning.

The next element you see is the reference to growth challenge. You want to be able to talk in terms of what is the opportunity for growth. Given this problem, let's say that you know that you have 24,000 dads that are in serious need in your community. Your program currently serves 150. What is your growth challenge to being able to reach your desired threshold of 500 fathers? You want to be able to articulate what that is. Is your problem outreach? Is it that you have the demand but don't have enough space? The better your growth challenge is, the better it suggests a potentiality to create greater impact, the more attractive it will be to a funder. If it's just that





your program in the past has helped 150 fathers and you've touched 591 that touched 750, that didn't promise an impact. That's just making connections. Who wants to give you \$1 million just to connect? We're talking about large funding opportunities, greater accountability, greater responsibility.

Participant: When you are communicating with large funders, is it more beneficial for them to see mostly statistical information or personal stories of how individual people have been impacted?

Bernice Sanders Smoot: Both. I'm going to tell you why. You will have people make an argument to tell a great story. A great story is very important. It really does touch the heart. With people writing a big check, you have to touch the head too. Because the heart may really want to give you a lot of money, but it has to make sense for the head to do it because that funder has accountability too. You want to make sure you've done your due diligence. You've given them both the data and the stories.

That moves into what I call the hardship phase of the relationship. The courtship you begin to identify with them. The hardship is, now you have to produce. You have to give them everything they want to build that trust and hold on to that trust and cultivate a relationship that will be longstanding so that you don't get a small check one time. You get a big check and a big commitment for years. Another way that you get that big commitment for years is when you're talking about the problem, you're going to project now how you'll be different in better solving the problem. You want to offer a solution that's goal oriented. Let's say in five years you want to have this kind of impact. We're so accustomed to thinking about the short term and then we'll say, well, I just need \$85,000 to do this one thing. You don't realize that once you get that \$85,000 to do that one thing, then you need more for the next thing. If you strategically plan to think, what is it we need to do over a period of three to five years, how do we do it, and what kind of money will we will need to make that happen, then you're barking in the league of the big funders.

You have to be able to make that case. That means strategic planning. That's hardship stuff. That's not just sitting in the meeting room and dreaming of something and writing it down and saying, okay, we can make this work. It requires some hardcore thinking and planning around the theory of change that's very realistic and based on what you understand in your community. Anybody know what the theory of change is supposed to do?

Participant: It's the roadmap of what it is you're trying to change up through the strategies and the things you're going to do and how you're going to measure them to get to your ultimate outcomes and the goals of the project or the change you're trying to affect at a population level.





Bernice Sanders Smoot: Absolutely. We have another \$1million winner. You can think of it as a roadmap. Another reference that I like to call it is bridge building. Let's say that your program is right here. Whatever the size and scale of your program, it's right here. What you're trying to get to, is right here. You have this chasm in between. Your theory of change should build a bridge or roadmap from here to here in a way that makes sense. It's hard work, but you don't get the big bucks easily. If you did, everybody would be getting it. It's going to take a lot of work and there are organizations that are willing to roll up their sleeves and do the work. You don't have to do it all by yourself. You should have a board involved. You should have partners involved. Because the truth is, the kind of things that need to happen for fathers' lives to improve is very likely going to take more than just your program.

You need to be able to make a case to have partners and co-investors, and volunteers, because this is too heavy a load to lift all by yourself. The truth is the funders expect that. The big funders do not expect you to come in with a program that's been in existence for three to five years and has a staff of four, and you're going to sell them any idea that you're going to revolutionize your community and touch 24,000 fathers' lives. You can't sell that. I mean, would you buy that? Because if you do, we need to talk after.

It becomes very important that you want to be able to talk about how you're different and better. Who can tell me right now how is your program different and better? Why should I fund you versus someone down the street?

Participant: Our program is different and better because it has no parameters. We are able to service all fathers, all ages, all criteria, all backgrounds, all colors, all ages and stages. We have no parameters of men whatsoever. We're able to take our curriculum and change it to a way that we just do infant or child development in teams when we talk about education.

Bernice Sanders Smoot: That sounds really good. I would love to know a little bit more about how you do it. The first question that comes to my mind is, how large is that organization. Second question is, what are you doing that the others aren't doing. I haven't heard that part though.

Participant: We're the only one in our city with no parameters. We don't service as one type. We don't service a certain age. I have 16 years old and 60 years old. You end up having a peer pressure educational support all in one. No matter where they're at, that first diaper stinks so you really don't need a curriculum for some stuff and conversation and to be able to vent and be able to get things out, which also helps in a lot of different ways.

Bernice Sanders Smoot: You're saying that by your mission directive, you're not limited to service guys from 16 to 24, or you're not going after just low-income black dads.





Participant: Absolutely.

Participant: My name is Thomas. I'm with the Denver Indian Center. What we have done is we put a traditional spin on our program, and we integrate some Native American traditional aspects to our program, which is general enough to reach across tribes, not just one tribe.

Bernice Sanders Smoot: Here we have two different approaches, but they have a uniqueness in each. The first one you heard, which is broad strokes. We welcome all dads no matter what. The other one is offering a curriculum that's very tailored to the Native American population where it serves. It makes it unique because my guess is, they're no other programs doing that for these fathers.

Participant: There is another one, but it's on a reservation. We're in an urban area. We have urban Native Americans.

Bernice Sanders Smoot : You're off reservation?

Participant: Yes.

Bernice Sanders Smoot: That means that's another area of uniqueness?

Participant: Yes.

Participant: Our organization is a CAP agency, Community Action Partnership. We have Head Start under us, so we focus on the fathers of children from 0-5. We also focus on the low-income sector around building housing. We partner with different agencies to try to get them back into the workforce through job skills, carpenters and so forth. We get them very early. We try to get them involved in the classroom, the value of being present. We take the stigma away from gender oriented and assign things that they could actually do.

Bernice Sanders Smoot: Now one more thing that's very important is partnership. I already know he's from an organization with a pretty hefty budget. They have partners. That's very important to think about.

Participant: In our city, we found out that we have more of an employee issue than we do an employment issue. We have 15,000 jobs and I need to find men and fill them. We provided a six-week curriculum that teaches men employment skills, relationship skills, financial literacy skills, and time management skills. At the end of the program we have a job fair along with driver's license restoration and expungement programs in place.





Bernice Sanders Smoot: What I love about what he just said was that we don't have an employment problem, we have an employee problem. Then he went specifically down the list of the services they provide to improve the ability of dads to become better employees. Even down to driver's license restoration and records expungement. Do you see the difference that that kind of presentation makes in terms of your being able to understand and see the benefit? It's wonderful that you all have great ideas, but it has to be backed up by hardcore iterations of what makes that great idea a great idea.

We also want to get into what's the proof? What are the likely cause benefits of the social impact, and I say key social impact? I'll talk about that in a minute. What's the estimated return on investment? You want to make sure that anything that you are making reference to in a financial way is research backed; and, we recommend third party validation, not necessary, but it adds to the extra measure for trust sake.

The PROI approach. I don't know how many of you have visited the Saint Wall Street website but if you have, you would see on our page the testimonials where the fatherhood program people were talking about how much money they received. The Ridge Project increased their budget by \$5.79 million. The KISRA program in West Virginia quadrupled their budget. One of my favorites came from Halbert Sullivan at the Fathers Support Center in St. Louis, Missouri, who said that there had been a corporation they had been receiving \$5,000 a year from for many years. When he shared with them their new case for support, they were immediately increased to \$100,000 a year.

If you can achieve that kind of growth, is it worth the hardship? Now you have to not only say it is worth it, you have to be willing to roll up your sleeves and do the work. We think that what we do makes it easier because we give you the framework around which to do it. We help you focus on what we call value. That's the word you don't hear in nonprofit communities. Nobody talks about value. Yet, if you are an effective human services provider, you are creating incredible value for society. You are transforming people's lives. As soon as lives get better, economy gets better. Who knows the definition of the word economy? It's an English translation of the Greek word *oikonomia*. It means management of a household. When we talk about economy and the corporate world wants you to think, "jobs equal economy," that's not true. Management of a household creates economy because unless you manage a household well, you don't create employees who can work jobs to build economy.

You are on the economic stimulation side. You are actually creating the better households necessary to create the people who can hold the jobs and build the economy. That's what you do. You never think about your value. You think about your needs. When you start thinking about





your value, then you can start making a case that will impress a funder because nobody wants to be sought after under the idea of your presenting your needs.

You come to me, you make a value proposition. If I tell you, "Look sir, if you give me a dime, I'll give you a dollar." How many of you are going to run out and get all the dimes you can get? You won't let me leave the room. You're going to run and get dimes from here to eternity because I'm going to give you a dollar.

That's the same case you want to make to a funder. Essentially, you want to say for every dime you give me, I'm giving you a dollar. You're now making a case that is absolutely irresistible. We're talking about you wanting to make sure that indication makers research back. You have to have a valid program. You have to have a solid plan that's based on a likelihood of success. You want to make sure that it's something that the funder will favor that is child and family focused. I know that you're doing dads. I love dads. I had one. Even though he was an absent father most of the time, I can certainly understand the value of a dad. My daughters, they love their dad. I understand that. This is where the focus is. If this is where the money is, you have to speak to where the money is. You want to be state specific. Please, do not count on just federal data about the status of fathers in America. Don't say, across the United States, this is one that there's 50% absentee fathers. Know what it is in your state.

You want to take a value driven approach versus a needs driven approach. You also want to make sure that you use methodologies where there's PROI or another one. It has to somehow save you some time. It has to be cause effective. It definitely ought to be peer proven. You need solid ways to do this work. You don't want to get your board and a lot of people together strategizing around something that will not work.

Participant: When you're talking about funders are you talking about foundations or government?

Bernice Sanders Smoot: I'm talking largely about foundations, even though when I was asked to do this, it was very interesting to me that they specifically wanted me to bring PROI back to the focus because they understood that it's talking about return on investment. Whether it's something the government's thinking about I can't say. I do know if you want corporate support, this is very important.

These are the three things that you want to focus on. You want to be able to plan, produce, and prove. These are the benefits of making planning from a courtship phase. You want to wow your stakeholders. You get to promote brand superiority. These are the things that clients have said happened. You boost staff morale and retention. You get to strengthen your board support. You





can attract partners. You get to actually lean toward demonstrating very high ROI, far higher ones.

Here is the hardship phase. Dirty gloves, you have to do the hard work. You want to do the hard work of being more responsible and accountable to those who are going to trust you. That is generally where you get into your impact measurement. I'll tell you quickly about value driven CQI, continuous quality improvement. For those of you who don't know, CQI was actually developed to help corporations improve industry and improve product line activity. If you're going to do it and use it for a nonprofit, it needs to cater to the idea of improving processes for humans and not creating product. Product you can count and see the productivity increase. "Humans" is totally different. It's not just how many humans we touch, but how their lives improve. That's a totally different approach. When you do it, you will be able to see the father impact on child and family well-being, and on the economy and social change. You will prove financial stewardship, your work above cost, and you will boost the personal integrity of your program.

Participant: My name is Lisa Watson. I'm the deputy secretary for the Pennsylvania Department of Human Services. Everything that's being discussed here, I can tell you as a funder, as the Commonwealth is applicable to government. I receive a number of proposals that are asking for money to fund different types of programs. Every technique and methodology and strategy being discussed is related not just to foundations, but to government entities as well.

One of the important things that was said is you really have to allow us to get to know who you are, but most importantly, you need to know who we are. Many organizations come to us and have no idea what our priorities are. Meaning you have to take the time to do the research to know as a state government what are our priorities? Where are we looking to go? Where are we spending our money? Then talk to us about how your program fits into our priorities.

The other thing is accountability. That is key. I've had someone say, even here at this conference, we would love for you to give us money, but we don't want to track. Well, that's just not going to happen. The reality is, as a state government, we get the majority of our funds from our federal partners. They are not going to allow us to just spend money frivolously. We have to account for it. We want to work with you and not make it burdensome. The best thing you can come to us with is to already have your strategy in place about how you're going to effectively track the money we give you.

Bernice Sanders Smoot: Thank you Lisa. Here's the part about proving. You really want to show value worthy of a long-term relationship. We have software to help you with that. Somehow, you have to do impact evaluation and reporting if you're not using our PROI software. You're actually demonstrating that you've improved child and family well-being. You can





demonstrate the government gains and savings. You can demonstrate the value of employee incentives, the value of community support, and the return on investment for funders. Those are all the things you can actually demonstrate in terms of actual value achieved.

This is the example of a case for support exerted that we did for another organization. I did not choose a fatherhood program to show you because I didn't want to steal another fatherhood program's information. This is for Project Bridges, a faith-based organization that we serve in the Washington, D.C. area. This is like their elevated pitch. The best way to transform communities is to empower those who influence them. No one influences low-income communities better than church and ministry leaders. No place empowers church and ministry leaders in the metro D.C. area better than Project Bridges. They're making a lot of claims here, but then we have to back them up. We look at the problem. What we're talking about is very specific to D.C. residents. We're not talking about what's going on in the metro D.C. area. We're not talking about the nation. We're talking about the fact that many of them are turning to local ministries that lack skills, scale, and support to meet their many needs, and that the ministries must be empowered.

We're making the case about what the problem is and the challenges that we've stated that this organization addresses. Then we talk about how they're bigger and better. They've been around for 21 years and are entirely funded by a board of collaborating black church leaders. If any of you know anything about the black church, number one, we have a lot of them collaborating, that's huge. Number two, if you have them all giving money to operate a program together for 21 years, that is enormous. It is unheard of. Their partners include leading universities, organizations and corporations. We're talking about bigger and better. We take to greatest scale, helping ministries meet the material and spiritual needs of families in solving the poverty throughout. More than 600 square miles of Washington, D.C. Are we getting a sense of bigger and better? Then we see co-investors that would pick social impact and a high return on investment and then how it can actually grow higher. Now, in terms of the proof. We just looked at the last two years and they actually distributed \$2 million worth of material goods free of charge to over 1,100 families and children in poverty with the partnership they have with World Vision and Costco. They facilitated higher education attainment for 142 ministers and then they value the education that they received at \$600,000.

We have additional gains and savings all of which by the way are documented. My company created a survey and we surveyed some of their partners and came up with an average of tens of thousands of dollars in value that they felt they received as a result of their partnerships. Their current estimated program value in terms of impact, not budget, is just over \$2.5 million. How's that for return on investment? 621%. Bigger and better. This is not undoable for you. It's hard work, but it is possible if you're doing a great job. Here is the connection to the whole idea. This is where I hope I'm answering the gentleman's question from earlier. We're looking at the



ADMINISTRATION FOR
CHILDREN & FAMILIES
Office of Family Assistance



National
Responsible
Fatherhood Clearinghouse
fatherhood.gov



various ways in which value is associated with the impact that fatherhood programs typically have on dads. We did it according to the FIRE acronym. Family-focused, you're strengthening parenting, you can be reducing child abuse and neglect, you can be reducing domestic violence and increasing child support. All those things can be translated into dollar value. To connect it you're strengthening employer benefits, reducing crime balance of recidivism, or perhaps, increasing marriage.

Resilience. You're elevating education and earnings. Perhaps you're reducing divorce, helping people recover from substance abuse, reducing homelessness. Then ideally, you're going to be reducing generational poverty, increasing family assets, improving child academic outcomes, reducing juvenile delinquency and unwed pregnancy. How's that for value? You see fathers in that?

Now, what if you were able to give a dollar value to every one of these fathers you helped create? I'm going to point out one more story. Yesterday, Kenny shared that there was a young man that he's been working with since he was very young. He is now a man in the construction trade. He recently helped his friend get some much-needed construction work done in his home. I'm thinking to myself, and in my head I'm adding a value. I'm thinking about all the years that your mentoring service helped kick this young man. I'm thinking out of prison. Perhaps he didn't become an unwed father. Perhaps he's getting the employment, working for number of years. He has acquired a trade and he is now working in that trade. He's married. He owns his own business. This just got even better. If I had to make a case for that one man, we're easily talking about \$1 million in value looking over the years. One dad and counting.

Here's a summary of the key points. You want to actually make sure that you're going to be focusing on improving child and family well-being, that you're going to focus on return on investment, and you're going to make sure that you connect fathers to improve child and family well-being. The sheet that I gave you is like your bridge building. It's to help you begin to think about that theory of change.

If you saw that 5,500 grants were available for child and family well-being, two of them for fatherhood, do you need to make a connection to child and family well-being? Yes.

Participant: I've heard a couple of comments about adapting curricula to a specific program. We made a proposal using 24/7 Dads in homes because that's what our agency does in all of our other departments. We have an early Head Start program, early intervention, parents as teachers and others. Despite being funded years later, we were told that that was not being applied with Fidelity. We had a letter from the person who developed 24/7 that said I do not approve this, but he featured it in his newsletter. I would just caution anybody trying to adapt the curricula to be very careful about how you do that. The second thing, the other program that we applied for that





they said was not effective was rookie dads. We taught dads how to make sure the formula wasn't too hot, how to swaddle their children, how to change diapers, and more importantly, how to recognize or respond to their infant and toddler's emotional needs based on what it was. That's clearly connected to a reduction in child abuse and neglect. A piece that a lot of people need to write into their proposals is, the more confident and secure dads are in taking care of their children, the less likely they are to get angry and frustrated, which tends to lead to abuse. That's one suggestion that may help somebody write a proposal to connect those two pieces together.

Participant: You were talking earlier about relationships. I find out about them through their goals and mission statements then use that information to build on that relationship. What is the best way for them to find out about me?

Bernice Sanders Smoot: When you said them, you mean funders?

Participant: Yes, funders. Because she was saying get to know us first. So, I get to know them by their goals statement, mission statement, values statements and I'll read all through that and then that gives me all their "profile" information or relationship. What is the best way to let them know who I am?

Bernice Sanders Smoot: I think the best way for you to get a funder to want to know you is to speak very clearly about what you do and how it meets what that funder says they're interested in. That's the matchmaking. That's the relationship building. The better you're able to do that, the greater your chances.

Participant: Now I see why Deborah Taylor wanted me to come to this. You've been trying to tell me a lot of things for three years. I almost felt used. When you talk about "go away money," I found out that I've been given some "come along money." What I mean by that is organizations who are more established and have their paperwork in order have come to partner with me and used my statistics to get their big checks and they just give me Scooby snacks on the side. How do I get out of that arena and begin to get into a benefitting funder?

Bernice Sanders Smoot: I have to give you another \$1 million. Honestly, what you really want to be able to do first and foremost is become a steward and a champion of the value that you're creating. You have to be doing that. As long as you're seeing yourself as needy, you are vulnerable to exactly that kind of situation because you think that you need them, and you don't understand that they need you. You have to be able to make that value proposition clear. When you're talking to someone who wants to come in and use what you have, you have to be able to negotiate what you want from them, what they're going to get from you and how many dollars in that mix are going to be settled. Advocate for the strength and the value of what it is that you're doing. Don't give away the family store. You get another \$1 million just for raising that point. I





want you to be able to get that. How many of you believe that you're going to start valuing your program differently, seriously? Somebody tell me what's one thing you're going to do differently when you leave here today?

Participant: Do a better job at statistics.

Participant: I want to make sure that I go back in the return on investment of what's actually occurring in this portion. That they understand what is actually going back into the community by the investment that is coming.

Participant: I'm going to just take everything that you taught me as far as courtship, planning, produce, and then proving it because we have it. We have it all. We're in partnership with one of the biggest education centers. We have all that data and are basically using it ourselves. I'm in the same situation where we're putting in all the legwork, the grunt work and they're eating off our hard work.

Bernice Sanders Smoot: I hate when that happens. You have to fight against that.

Participant: I'm going to start thinking like a funder.

Participant: I'm going to go home and look at everything that I do from the lens of child and family development versus father development, which is where I've been. You had as pieces of evidence, reductions in child abuse, neglect and domestic violence. Those are community-wide trends. How do we connect our program that might serve 100 dads in 12 months to a community-wide trend? How do we provide evidence of reduced child abuse and domestic violence?

Bernice Sanders Smoot: You call Saint Wall Street because we have personalized all that. We have per person, per state, per unit costs for every one of those things that you saw listed on that FIRE slide. We have it all in the calculator and in a 20-minute interview with you. If you have your data ready, we can run a report.

Participant: We're part of CQI and our CQI actually shows that our clients are benefiting greatly from the program, but from the life coaches and the facilitator, I think following up on the same thing is how to quantify that. We work a lot through our Department of Children and Family referrals and they've actually adopted a lot of the curriculum into their work. They've embedded it into their faith-based efforts. What's the benefit cost analysis of this and how do I quantify it to really show that return on investment? I know we're doing it. I know the staff are doing it, because people actually want to see the dollar amount. We're having the conversation with our five commissions that look at our early education. We're having them with Department of Children and Families. We're soon going to approach Child Protective Services, but I don't have





the ability to say, this is the dollar amount that you are saving as a result of our life coaches and our facilitators working with your dads.

Bernice Sanders Smoot: You have the statistical data. You just don't have the cost benefit analysis. You definitely need to get in contact with us

Participant: As you're getting to know different funders and you see what's important to them, is it better to try to create a story for each of them? You speak directly to what they want to support versus create a fair story of who you are and then be choosy about who you reach out to that's a better match. Should you be really choosy about who you want investing in you instead of just taking whatever money you can get from anywhere?

Bernice Sanders Smoot: What do you think?

Participant: I think there's value involved. Money is money, but at the same time I think it's important to be really strong and clear about who you are.

Bernice Sanders Smoot: I can tell you that the best funded nonprofits actually do the second one. They actually understand clearly who they are and what their value is and then they find funders that track with that. That's really the better way to go. Remember, you're not chasing money, you're building relationships that pay. The first issue is relationship, not pay. You have to be able to make the case for your relationship. How much is the estimated dollar impact of absent fathers that headlined the landmark in a National Fatherhood Initiative report?

Participant: Hundred billion.

Bernice Sanders Smoot: It was a Hundred Billion Dollar Man report. Second question for a million dollars. What are three meaningful, measurable ways child and family well-being improve as a result of responsible fatherhood?

Participant: Strengthening parenting, reducing child abuse, neglect and domestic violence to increase child support.

Bernice Sanders Smoot: You got it. Whoever gets the answer to this gets \$2 million. What do researchers say is the prevailing cause, not the symptom of father absence?

Participant: Role models

Bernice Sanders Smoot: Role models. It's called parental bonding. Because, if you don't have parents who have bonded and cooperated, you cannot improve child and family well-being. That





becomes another important thing for you to think about as you entertain your idea of strategic planning and moving forward.

Participant: Part of this is a brand identity that's created. Everyone talks about the logo, but it's really brand identity. What would you say are the three key things that an organization could do to improve their brand identity for fatherhood for a funder?

Bernice Sanders Smoot: The first thing you will have to do is get your board onboard with the value of the field. Having data that actually speaks to the value will be very important. Most people think about branding as an external thing, but your brand actually starts inside. If you don't have it sold inside, you can't sell it outside.

Second, you have to get the value of your program onboard. You have to understand what is the value of the work that you're doing? How can it improve with the new theory of change? How much greater can it be so you can make the case for the bigger money? Once you start understanding what that bigger bridge looks like, it's going to automatically boost your brand because you are already elevating the future of your program and what it's going to look like.

The third thing I want to encourage is collectively you all work on boosting the value of fatherhood to child and family well-being in the field. If you are a part of NFI or other organizations serving fathers, encourage them to start working more at connecting fathers to child and family well-being. They are supposed to be advocating for you. Make them work. Make them do it. Encourage them. Whatever groups you're involved in at your state level, local level, encourage that. We had a conversation back in 2009 with a group of the best fatherhood leaders at that time, Ron Mincy, Jeff Johnson, Joe Jones all in one room. We talked about making the case for fatherhood in the name of child and family well-being. There's been a lot of progress made, but not in that regard, and it has to change if you're going to have a sustainable future. Thank you all so very much. It has been my pleasure to serve you today.

