Building Partnerships to Extend Funders’ Resources

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(Part four of the five-part field report Race and Place-based Philanthropy: Learnings from Funders Focused on Equitable Impact)
Even the largest place-based funders have comparatively limited resources to support community priorities. In recent years, many of the place-based funders from 12 regions across the country who gathered in a learning group in 2020 have increasingly collaborated to amplify the impact of their resources. They described how the pandemic and the racial justice crisis redoubled their commitment to work with their peers and other stakeholders, principally in four ways.

**Expanding the inner circle, to bring communities into cross-sector coalitions for change**

Several of the peer funders underlined the positive impact that effective collaboration—aligning and coordinating the efforts of diverse stakeholders toward a common goal—can have on the communities they serve. As place-based funders, they believe a critical part of their work is to engage with a wide range of cross-sector stakeholders in their respective regions, from elected officials and the heads of government agencies to community members and leaders, and from nonprofit partners and intermediaries to power brokers and local business leaders.

One illustration of this kind of cross-sector collaboration can be found in Chicago’s *We Rise Together: For an Equitable & Just Recovery*, a coalition of partners across philanthropy, business, government, nonprofits, and communities. Its goal is to support the Chicago region—especially Black and Latinx communities—as it builds back from COVID-19’s economic impact and toward an inclusive, resilient future. Hosted by The Chicago Community Trust (The Trust), *We Rise Together* has thus far raised more than $37 million and seeks to raise at least $250 million in pooled funds for this five-year initiative.

The coalition grew out of the partnerships that fueled Chicago’s COVID-19 emergency response fund. Someone with foresight asked: what do we do when the emergency is over, but the communities we care about are worse off than they were before? Memories of the inequitable recovery from the Great Recession of 2007 to 2009, which left Chicago’s Black and Latinx communities far behind, were still fresh. *We Rise Together* came to life as a collective effort to prevent history from repeating itself in Chicago.

**This cross-sector partnership has four distinguishing features:**

**A different way for funders to work.** The partnership’s logic is built around the notion that a group of people with diverse experiences and expertise will likely come up with better solutions than any single person within the group. Of course, this means that funders must break out of their silos and shift from individually trying to find “the answer,” to collectively piecing answers together with contributions from all sides. For The Trust, the potential for impact made such a shift worthwhile.
“We have long recognized the importance of working in coalitions,” said Andrea Sáenz, The Trust’s chief operating officer. “But it’s become even clearer that we won’t realize the goals we have established unless we work in collaboration with others.”

**An inclusive steering committee.** The Trust ensured that under-represented communities were represented on the coalition’s steering committee. One-third of the committee would be composed of community leaders, with business and philanthropy each getting one-third representation as well. (Importantly, The Trust kept the public sector in the loop, bringing in city and county leaders as non-voting, ex-officio members.) While organizing the steering committee, The Trust had lots of internal conversations about creating space for community members to surface those issues that are most important to them and also to look across the table and engage business leaders and funders on such topics as closing the racial/ethnic wealth gap.

Those internal conversations made clear that part of The Trust’s challenge would be to facilitate a true multi-sector collaboration to ensure that even as the business community shared its perspectives and resources, community members had an equal opportunity to share their real-world expertise. The challenge would be to find common ground across people with different priorities and build new alliances.

“We surfaced questions and possible pitfalls about bringing disparate groups to the table,” said Sáenz. “But we believe the effort will pay off.”

**Maps that identify opportunities for impact.** To get a read on opportunities for collaboration and impact, The Trust partnered with two pro-bono strategy firms (one from the corporate sector, the other a nonprofit) to landscape the ecosystems around Chicago’s historically underinvested communities.

The firms created maps that identify those neighborhoods most negatively impacted from COVID-19’s economic fallout and are ripe for investments in ground-up, community-driven economic development and could especially benefit from cross-sector support.

With the maps providing navigation points, the steering committee for We Rise Together can identify initiatives that have the greatest potential for change.

The maps can also help highlight initiatives that can benefit from the insights of diverse working groups with subject-matter expertise and community-sourced knowledge. The idea is to continuously incorporate community leaders’ insights and feedback to gut-check hypotheses that are drawn from the landscaping data. This kind of ground-level due diligence is vital, not least because the steering committee guides the coalition’s initiatives and investments.

“We’re looking for ground-up solutions that are embedded in sustainable, long-term practices that are more community driven, which are more likely to have a positive impact.”

*Andrea Sáenz, chief operating officer, The Chicago Community Trust*
Pathways for ongoing community engagement. Drawing on the collaborative approach that *We Rise Together* is taking, The Trust is organizing community conversations, so the fund can tap into local coalitions for input on neighborhood-level planning. In this way, the salutary effects of working collectively ripple from the communities to the fund, and from the fund back out to communities. Said Sáenz: “The fund’s structure allows for greater collaboration and coordination [between our investments and work underway in the community].”

In addition to The Trust’s work with *We Rise Together*, other peer funders are also using cross-sector groups to harness the power of diverse experiences, perspectives, and expertise. In doing so, they are similarly setting a big enough table to ensure that community members have an equal number of seats.

“The notion of ‘nothing for us without us’ is permeating throughout our whole organization,” said Avo Makdessian, vice president of community partnerships and learning at Silicon Valley Community Foundation. “Our collective impact initiative will have a diverse governance group, with a CEO sitting next to a mother of young children who cares about advocacy, but doesn’t have time or resources to otherwise engage. All at the same table, all talking about how to rebuild a better economy that works for everyone, not just the one percent.”

**AVO MAKDESSIAN, VICE PRESIDENT OF COMMUNITY PARTNERSHIPS AND LEARNING, SILICON VALLEY COMMUNITY FOUNDATION**

Using social capital to connect community leaders to decision makers

Even as the place-based peer funders think through approaches to building power in communities, all are deeply cognizant of the power (and reservoirs of untapped power) that permeates the neighborhoods they care about. They value lived experience as much as technical expertise. And they know that because individuals and families are closest to the challenges they face, they often have solutions that elude social-sector professionals.

At the same time, these funders recognize that the power to catalyze social progress still resides with those who hold the “D”—that is, the decision makers who lead public, private, and social-sector institutions. So, to help community-driven change come to life, funders are using their social capital to connect grassroots groups and frontline nonprofits with their regions’ power brokers and other funders.

**Connecting community-embedded nonprofits with other funders and funder dollars.**

Broadly speaking, it’s a two-step process for helping grantees achieve the “Double D:” first come the decision makers, then come the dollars. Such was the case when *The Kendeda Fund* introduced a grantee to another funder, amplifying Kendeda’s initial investment.
In 2018, following Georgia’s highly contentious gubernatorial race, the pressure was on to turn out even more of the state’s voters for the 2020 presidential race, especially Black voters and other people of color. Tamieka Atkins had recently become the executive director of ProGeorgia, a nonpartisan, voter-engagement advocacy network of more than 30 organizations, which works to connect and coordinate state-spanning civic participation efforts.

In late 2018, Kendeda’s Tené Traylor, the organization’s fund advisor, met with Atkins and became an early investor in ProGeorgia’s 2020 initiatives, providing the organization with a significant, multiyear general operating grant (as described in the third part of this series). But with a new, high-potential leader helming such a critical voter advocacy organization, Traylor wanted to do more. “Tamieka understood what she was doing, but I knew it was going to be difficult for her to get to local donors,” said Traylor.

At the time, Kendeda was co-funding other Georgia organizations in partnership with the Annie E. Casey Foundation’s Atlanta Civic Site. In a conversation with the Casey Foundation’s leadership, Traylor made a pitch for Atkins, whom she described as a “leader with vision.” After doing its own due diligence, the Casey Foundation joined Kendeda in co-funding ProGeorgia. In addition to contributing unrestricted dollars, the Casey Foundation also provided wrap-around supports to increase ProGeorgia’s ability to accomplish more. And while The Kendeda Fund typically works behind the scenes, it also made an effort to spotlight ProGeorgia’s civic-engagement initiatives, in hopes of attracting additional funding for ProGeorgia from other philanthropies.

Importantly, The Kendeda Fund and the Annie E. Casey Foundation partnered in a way that complemented their co-funding. “With the Casey Foundation providing [infrastructure] support, we could give more unrestricted capital,” said Traylor. “And from there, Tamieka’s work just took off.”

Although dollars of course matter most, it’s never wise to discount the value of social capital. By simply putting in a good word with other decision makers, funders can still help nonprofits—even those that are not grantees—move along the path to progress.

“Even if I’m not in a position to fund, I will ask the applicant if a phone call would be helpful for context, so I can share why I can’t invest,” said Ryan Palmer, the A. James & Alice B. Clark Foundation’s director of Washington, DC community initiatives. “Those calls give me a sense of other partners we can put them in touch with and what else might help or hinder them. I talk a lot with other funders and we do make those connections.”

In 2020, Palmer spent a lot of time working on maternal health and childcare with three hospital partners and three community partners. Across those partnerships, eight working groups explored ways to achieve population-level change around issues including health
economics and culturally responsive care. Even as the Clark Foundation helped fund those efforts, Palmer looked for additional ways to use Clark’s clout to help those actors advance their impact.

Said Palmer: “A big part of my job is figuring out how I can responsibly leverage the power that a significant investment buys you, to help push the work forward in support of those organizations and their goals.”

**Coaxing decision makers to talk to grassroots grantees.** Although more and more funders recognize the power in supporting communities as they lead their own change, that realization can still evade those who stand at the peak of the social and public sectors’ power hierarchies. The big dogs might tell communities that “we’re all in this together,” while simultaneously upholding vast power differentials. Funders can at least take a step toward closing that gap by pushing power brokers to connect with grassroots groups they should know well, but too often don’t.

One peer funder, who thought it was essential that funders connect regularly with grassroots leaders and the heads of frontline nonprofits, recalled a conversation with the head of one of the largest philanthropies in their state. He was beginning to shift more of his organization’s focus around equity, but he was reluctant to meet with the leader of a community group—a person of color—who was also a grant applicant. “I told him he had to take the meeting,” the funder recalled. “People need to know that you care and hear them. They would rather hear a ‘no’ from you than being ignored and you being untouchable.”

Funders who want to bridge the divide between unreachable power brokers and the communities they serve have other tools at their disposal, in addition to discrete, one-on-one conversations. Such was the case when one of the peer funders tried to broker a meeting with community leaders and parents from a majority Black and brown neighborhood with a very remote school superintendent.

In the winter of 2020, during the depths of the COVID-19 pandemic, many of the families in this largely low-income community lacked the technology and connectivity to keep pace with online learning. Despite parents’ alarm over what they perceived as their children’s substandard education, the superintendent kept most of his focus on other issues. “The feeling among many parents was that the district had given up on maintaining standards around distance learning for their kids,” the funder recalled. “But the superintendent would not hear, meet with, or make space for parent and equity groups concerned about children being left behind.”

Even as this particular funder recognized that the district’s remote learning plan was failing children—especially Black and Latinx children—other funders didn’t. So the funder organized a meeting, so those other funders could hear directly from their own grantees—that is, nonprofits that had a close-up view of the struggles of underserved young people and their concerned parents. With the complaints of parents and community groups ringing in their ears, five funders who were deeply invested in the district set up a meeting with the superintendent, where they relayed what they heard from the community.
“The meeting did not go well,” the funder told us. “But it was important for my colleagues to realize that if this guy is acting this defensive with us, imagine how he must be with the community.”

Despite hearing directly from the funder group, the superintendent still kept his distance from the community. But he did deputize staff to meet with community groups and work out a new remote learning plan that incorporated some of the community’s requests. The moral of the story: funders can use their position and influence to get a powerful public sector leader to take in the concerns of advocacy groups as well as parents, even if the dialogue had to occur through intermediaries. And there is more than one way to make that happen.

Making the case for other funders to work with allies on community priorities

Many of the peer funders are using their influence to encourage power brokers and other funders in their regions to work collectively to advance community-driven priorities. Their efforts have yielded at least three insights for influencing their peers and other stakeholders.

Think about who the best messenger might be. Sometimes, it’s more effective if white allies use their place and privilege within philanthropy’s power structure to champion the need to work collectively to advance community-driven change across Black, Indigenous, and people of color (BIPOC) communities. At other times, BIPOC leaders are better positioned to drive that narrative. The point is, “The messenger matters in philanthropy,” said the Kendeda Fund’s Tené Traylor.

The power dynamics in a given situation often signal who the right messenger might be for that particular moment. Recalling one such circumstance, Traylor reasoned that it made the most sense for Kendeda’s executive director (ED), Dena Kimball, to represent the fund to a large group of grantmakers. “It was one of those moments when we needed a white leader to articulate what I’d been doing and saying, to show that my work wasn’t separate [from her work]. It’s important for philanthropy to hear that EDs aren’t leaving it to the Black program officers or directors to do all the work. They need to own it, to show our alignment around the mission, from the top.

“On the other hand, Dena and I talk about how I am—and should be—the face of Kendeda’s equity work for most people,” Traylor continued. “For a lot of conversations with business, state leaders, and community folks, they need to know there’s someone who looks like me. In the city of Atlanta, there are not a lot of Black and brown faces doing this work.”

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TENÉ TRAYLOR, FUND ADVISOR, THE KENDEDA FUND
Another funder described work to align the right messenger with the message. “We do all this work around Black men, but we had no Black men in our leadership,” they continued. “Now we do. He and I talk about who is the best messenger to advance a particular issue. When is it too risky for [my Black male colleague] to push? When do we tag team? That’s the work to be done.”

Use data to lift community voices. Data can sometimes speak for community leaders who are underrepresented at certain decision-making tables. Case in point: funded in part by Houston Endowment, Understanding Houston is a data-rich platform that gives the region’s donors, community leaders, and residents a window into the region’s well-being. With more than 200 indicators on quality of life issues, the website delivers data-driven insights that at minimum, help make the case for necessary change. Such as the fact that in Houston, where “[deliberately placed] toxic waste dumps and industrial facilities emit high levels of pollution in and near predominantly Black and brown neighborhoods, ...Black children are 10 times more likely to develop asthma than white children,” according to the website.

“We believe data can support the voices of community members,” said Lisa Hall, Houston Endowment’s vice president of program strategy. “Data can be another way to capture the public’s attention. There is a place for funders to make sure that those public headlines push for more equitable policies.”

Funders are also using data to make the case for transforming inequitable systems. After a groundbreaking 2014 report ranked Charlotte, North Carolina last in economic mobility among America’s 50 largest metropolitan areas, the community pulled together to do something about it. Foundation For The Carolinas (FFTC) coordinated the creation of the Charlotte-Mecklenburg Opportunity Task Force, comprised of 20 community members, to dig into the data and explore why a Charlotte child born into the bottom
income quintile had less than a 5 percent chance of reaching the top quintile as an adult, less than half that of more upwardly mobile metro areas, such as San Jose, California.

The task force followed where the data took them, which included a deep dive into the underlying forces that most “create or constrain opportunity” in the region, such as housing, education, criminal justice, segregation, bias, and other factors. Based on their in-depth study, in 2017 the task force released a sweeping report that identified investment opportunities and more than 20 strategies for catalyzing upward mobility throughout the region. The data-driven report resulted in Mecklenburg County investing $9 million for free pre-K education and the private sector pledging $6 million to help build a diverse pre-K workforce, among other investments that ultimately total $56 million annually.

For its part, FFTC used the report and the data in it to make the case for why it is investing in Black issues within the Charlotte community. Much of the foundation’s reasoning is rooted in the data around the region’s racial disparities and the history of racial inequity and racial injustice within the region. “We called out [in the report] the work that needs to be done in education, health, etc.,” said Brian Collier, executive vice president of FFTC. “But unless we call out Charlotte’s history of segregation and how we treated Black communities, we won’t get to the solution we’re looking for.”

**Custom fit the message to the donor.** Community foundations have another specific stakeholder to consider: their donors. The average community foundation only has a small percentage of assets under management; individual donors direct the majority of funds that community foundations distribute. As a result, foundation officers seek to understand their donor base and identify the best ways to communicate with them, even as they double-down on working with those donors and potential partner funders who are already aligned on priority areas.

For example, The Chicago Community Trust (The Trust) partnered with a design firm to learn how to ask more focused questions of current and prospective donors: Less of, “Are you interested in funding education?” More of, “Are you interested in grassroots opportunities in the South Side of Chicago?” Those answers helped The Trust understand how it could begin to impact dollars under its influence, by engaging donors on initiatives that are truly aligned with their interests.
Then there’s Seattle Foundation (SeaFdn), with its more than one thousand funds and fund holders. As referenced in the first article of this five-part series, a 2020 report by the National Committee for Responsive Philanthropy (NCRP) made clear that if the foundation was to shift a significant amount of its funding to BIPOC leaders and communities, it would have to convince its donors, who direct a substantial majority of resources from individual Donor Advised Funds. SeaFdn has used the COVID-19 pandemic and the nation’s reckoning with racial injustice to make the case to donors that this is a once-in-a-generation opportunity to put far more of their investments into solutions that BIPOC communities help shape and lead.

Previously, the foundation engaged as a neutral, philanthropic bank, dedicated to serving the unique needs of individual fund holders. But as disparities deepen across communities, SeaFdn is working to engage donors more proactively in pursuing its vision for a more equitable region.

“Because historically we have been purely responsive to the donors’ direction, we have not had an intentional philosophy or approach to engage donors and fund holders,” said Kris Hermanns, SeaFdn’s chief impact officer. “We are using this moment to change that.” This work required the foundation to segment its core donor base, to surface opportunities to shift mindsets and behaviors. It then tested a variety of mediums and messages that were tailored to specific donors’ interests and motivations. Those approaches included:

- Webinars that briefed donors and fund holders on the foundation’s strategies and tactics for deploying the various funds, such as the Fund for Inclusive Recovery, The Creative Equity Fund, and the Evergreen Impact Housing Fund.
- Shared data, disaggregated by race, which underlined for donors how the pandemic disproportionately impacted the region’s BIPOC communities.
- Virtual meetings that spotlight the real-time work of grantees and BIPOC-led groups and coalitions.
- Video and print storytelling that connected communities’ narratives—almost entirely featuring BIPOC-led groups and grantees—with data showing “where gaps exist” and therefore, opportunities for funding.

All of these efforts were coupled with the SeaFdn’s advisory work by its donor-facing colleagues, who pointed wealth advisors, institutional funders, and private family offices to BIPOC-led organizations working at the forefront of the region’s racial-justice movement.

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Kris Hermanns, Chief Impact Officer, Seattle Foundation
“Our hope is to take what is much more circumscribed to scale, to work with influential individual donors to create a louder chorus advocating and reinforcing this behavioral shift,” said Hermanns.

Building alliances with other funders to invest collectively

Although funder collaborations don’t require a globe-spanning pandemic for them to come to life, a crisis certainly comprises the backdrop for the formation of some of those partnerships. Such was the case in the fall of 2007, on the eve of the Great Recession, when Detroit was already beginning its spiral into a nearly cataclysmic economic downturn. It was then that The Kresge Foundation launched the Detroit Neighborhood Forum for local and national funders investing in the city.

The forum began as a monthly breakfast for those Detroit-focused funders, as well as financial institutions, intermediaries, and key public officials—roughly 75 in all. The breakfasts featured keynote speakers and guided discussions around a myriad of issue areas, such as bankruptcy, foreclosure, and school reform. By 2008, with mortgage foreclosures on their way to impacting one out of every four habitable houses in Detroit, the forum “became the city’s primary philanthropic vehicle to understand and respond to the challenges facing Detroit neighborhoods,” according to an article authored by Wendy Lewis Jackson, managing director of Kresge’s Detroit program.

Those collaborations spawned a wide array of initiatives, including: a mini-grant program that funded neighborhood-led efforts to remediate vacant property; public-private partnerships that supported neighborhood green infrastructure programs, and another such partnership to enable community-based organizations to acquire, renovate, and resell up to 500 vacant houses; and initiatives that supported neighborhood business development and community-led improvements to streets and public places.

In one of our interviews, Lewis Jackson described the Detroit Neighborhood Forum, which continues to this day, as “a muscle-building exercise. If we weren’t doing it, I don’t know if Detroit would have come together philanthropically to make our major investments. There is a lot of work that happens outside of the meetings to foster collaboration, but the meetings are the glue.”

Across the peer-learning cohort, other funders have also established practices to foster conversations that might catalyze collaborations.

In Chicago, as the pandemic began to surge across the Midwest, The Chicago Community Trust and other regional funders connected through weekly Zoom calls, to coordinate their response to the crisis. Those conversations (as well as the crisis itself) reinforced for The Trust that one of its evergreen roles is to continue providing for basic human needs. The weekly call-ins were also “a moment for us to collectively acknowledge what is possible when we prioritize community voices,” said The Trust’s Andrea Sáenz. “A few months in, we started asking, ‘Well, what’s next?’” This prompted the creation of We Rise Together.
In Washington, DC, the pandemic catalyzed a deeper level of communication and coordination between the A. James & Alice B. Clark Foundation and other funders in the region. In one major issue area, early childhood, president and CEO Joe Del Guercio began connecting through weekly Zoom calls with the leaders of two other regional foundations. Their conversations helped them develop a shared understanding of the communities’ priorities and build the muscle for coordination and collaboration—identifying where they will lead or potentially co-invest.

At the same time, the Clark Foundation shared its real-world knowledge, gleaned from working with frontline nonprofits, with corporate foundations and other funders. “Given the dedicated focus of Clark staff, we have a high level of knowledge about community assets and needs,” said Del Guercio. “We can share those insights with other funders and business leaders, where there’s a level of trust in our perspective, based on our history of investment in the DC region.”

In addition to funder forums and regular check-ins, funders are also using small co-investments to lay the groundwork for future collaborations that could include larger co-funding efforts and deeper partnerships with frontline nonprofits. Their logic: it sometimes takes the small stuff to make the big stuff happen.

**Ballmer Group’s Los Angeles program also leans into a “citizen funder” approach.** That is, the philanthropy sometimes co-invests in local initiatives, even if the issues those initiatives address don’t align seamlessly with its institutional priorities, out of a belief that “being a good neighbor means recognizing that for work to happen in a community, you need to partner with community members and other local funders,” said Ballmer-Los Angeles Executive Director Nina Revoyr.

For example, even though adult chronic homelessness is an issue that typically resides outside of Ballmer-LA’s wheelhouse, it contributed $100,000 to support a funder partnership that had made housing for the homeless a top priority during the COVID-19 pandemic. Essentially, it was a “pay-to-partner” investment, which signaled to the funder collaborative that Ballmer-LA was aligned as a place-based funder that was responding to a crisis in its community and wanted to be a “good neighbor”—not an insignificant consideration in a regional context, where so many of the key players know each other.

**Questions for Reflection and Action**

- How might your social capital better connect community leaders to other decision makers in your region?
- How might you set more places for community members at cross-sector decision-making tables? What are the dynamics you’ll need to navigate?
- How might you use more of the voices of your own organization and/or data to represent and advance community priorities? Who in your organization is best positioned to help surface and champion what matters most to community members?
Where Might Race and Place-based Philanthropy Go from Here?

The peer-learning cohort of 12 place-based funders who shared their real-world knowledge across this series of five articles came together during one of the most tumultuous times in modern American history. A pandemic that infected millions of Americans and killed hundreds of thousands. The nation-spanning protests in the wake of George Floyd’s murder. The insurrection at the Capitol. The unavoidable evidence of deep, systemic racism, which once again boiled to the surface.

Through it all, as the peer funders grappled with some of the fundamental questions that confronted so many place-based funders during that time of crisis (and will undoubtedly confront them in the crises yet to come), the participants surfaced dozens of tactics and practices for benefitting many more under-resourced communities. An array of new options, as well as those that are known to at least some other funders, is often what it takes to fuel renewal. Because, as Seattle Foundation’s Kris Hermanns put it, there is no such thing as a one-size-fits-all solution.

“’There isn’t ‘an answer,’’” said Hermanns. “Especially in a time that feels incredibly hard and raw, it’s really nice to try and find an answer. To have something that you can grasp. What’s helpful with this learning community is that you find your answers based on the wisdom and experience, and even f-bombs that people are willing to share. And you think about how you distill and translate that experience.”

This series is intended to be an entry point in keeping that conversation going. We hope you find something to apply to your work, something to help reframe a problem, or something to share—or even debate—with your colleagues. If you have a practice or insight to extend to the rest of us, please reach out to Debby Bielak, one of this paper’s co-authors (debby.bielak@bridgespan.org). We will use your feedback as we figure out next steps for sharing what we’re learning about how place-based funders are leaning into more effective, more equitable philanthropy.