



# Moving Philanthropy Forward in 2022

What's holding the sector back? 10 experts share insights and offer solutions

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# Introduction

Often, when you ask anyone working in philanthropy about the state of the sector, they turn toward what's wrong. In fact over the past couple of years, there's been a lot of looking back—specifically, to understand how practices got so *out of whack*.

There's value in looking backward. But it doesn't mean much if you don't turn the insights you gain from the past into *action*.

In philanthropy, we've reached that pivotal moment. We've done a lot of cataloging of what's not working well and why. Now it's time to move forward, build solutions, and use what we've learned to improve the processes that have been holding us back.

To that end, Submittable reached out to 10 experts across the sector. They share their takes on the trends shaping philanthropy. And they give **practical advice** about how to embrace change effectively.

No matter what your role is—whether you're a foundation leader, grantmaker, program manager, or CSR professional—here, you'll find incredible tips about how to **reframe your approach** to this work for 2022 and beyond.

Let's dig in.



# The trends shaping philanthropy in 2022

Each of the following experts has a unique take on the philanthropic landscape. But if you step back, their advice is all moving in the same direction. **It's like having many different doors that lead to the same place.**

So although we've laid out 30 different strategies to help you implement change, it's not about going 30 different directions at once. It's about finding the right approach(es) for you and your team.

The solutions these 10 experts offer have some distinct overlaps across these four trends.

## People at the center

When philanthropy loses focus on the people that drive the work, things get off track quickly. Too often organizations are overly fixated on the processes they have in place. For example, some nonprofits let the structure of their long-entrenched processes shape their priorities—rather than being directed by the communities they serve. When that happens, practices

take priority over people. But of course, the processes should serve and support the community—not the other way around.

Many of these experts focus on the ways that philanthropy can **re-center people** in the work. This includes community members as well as the nonprofit leaders and employees who are driving change.

## A push toward true equity

Most organizations are thinking about equity in some form. But moving from conversation to action requires a focused effort. True equity is not about looking like a diverse organization from the outside, it's about incorporating a **wide range of voices** into the conversation and shifting the decision-making power to those who have historically been left out.

Insights these experts offered for advancing equity explore how equity touches every component of an organization, and what that means for crafting an effective approach. Plus, they shine a light on populations that have been long overlooked.



## Philanthropy as a reflection of reality

When philanthropy gets too insular, it begins to stray from the reality experienced by communities in need. Too often funders are trying to address problems without understanding the full scope of a community's experiences.

Operating with incomplete or false information creates ineffective solutions. The strategies in this guide help funders and nonprofits align their work with the needs of the people they serve and **stay rooted in community members' lived experiences.**

## Technology as a lynchpin

Many people working in philanthropy understand that progress in this day and age doesn't happen without technology. Tech can support effective collaboration, allow organizations to move swiftly, and free everyone from outdated processes that have held the sector back. Any hesitancy around investing in technology is waning fast.

The experts here share strategies on how to incorporate the right technology into your work—technology that allows you to **zero in on your mission and meet your goals.**



Photo from Brooklyn Community Foundation

# 10 experts break down 2022's biggest opportunities



Photos from Headwaters Foundation, Arabella Advisors, Brooklyn Community Foundation, *Inside Philanthropy*



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HER ADVICE:

**Expand the definition of  
philanthropy**

## **1 Giving is bigger than we can measure**

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### **LUCY BERNHOLZ**

Senior Research Scholar,  
[Stanford University's Center on Philanthropy and Civil Society](#)

As a self-described philanthropy wonk, Lucy Bernholz has spent the bulk of her career thinking about the world of social good. Right now, she sees an opportunity to reshape the borders of philanthropy itself.

## 1. Reexamine the industry

For Lucy Bernholz, there's no denying that philanthropy itself has become an enormous industry. Over [\\$88 billion](#) was given out by foundations in 2020 and that doesn't include the \$16 billion in corporate giving. Yet, even when this money is moving to communities in need, the hard borders that have formed around philanthropy can limit our understanding of what it means to give.

As Bernholz puts it: "We have cut ourselves a raw deal by equating philanthropy with rich people giving money because it is so much more than that." Rather, she encourages a more expansive view. At its core, philanthropy is about **using resources you have influence over to benefit someone else**. That could be money, but it could also be time, expertise, your network, or ideas. Often these versions of giving are left out of the conversation.

The formal structures that underpin the industry of philanthropy can also serve to exclude disruptive, less formal ways of giving. For instance, Bernholz highlights [mutual aid](#), the [solidarity economy](#), [kinship care](#), and people taking care of their neighbors. This is philanthropy too. "It's really critical to understand these

other ways of giving, especially if you're going to talk about things like **equity, diversity, inclusion, or justice**," Bernholz says.

Disrupting existing power imbalances is key. For funders looking to support giving that lies outside of traditional philanthropy, Bernholz recommends listening first. "Rather than inviting folks to your table, ask to come to theirs, listen, lay out what you have to offer, and then **heed their advice** on whether there is a place for you in the work," she says.

## 2. Broaden your understanding of social good

In Bernholz's view, a narrow definition of philanthropy has skewed the conversation around social good more generally. Too often the focus is on incentivizing the wealthy to give rather than putting policies in place that would help everyone get engaged in their communities. To improve outcomes, you sometimes have to go outside the confines of traditional philanthropy.

For example, efforts to encourage people to give or engage in civic life often focus on making changes to the tax code. But evidence suggests that tax law matters most to wealthier givers. "If the goal is to engage a broader swath of people in community life, meaningful incentives might be found in making



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**We have cut ourselves a raw deal by equating philanthropy with rich people giving money because it is so much more than that.**

**LUCY BERNHOLZ**

childcare or broadband more affordable, not in tweaking the tax code,” Bernholz says.

Sometimes you might find that the questions you ask lead you away from philanthropy and toward [public policy](#). Being open to the other levers that can make change will allow you to take a multi-pronged approach. It will also ensure you understand **how your efforts fit into or work against** larger movements happening within and outside of philanthropy.

### **3. Rethink the structures that hold us back**

When it comes to philanthropy, more is not always better,

Bernholz argues. She cautions against sticking to old ways of evaluating success. “Look at how the sector measures itself,” she says. “We measure the sector by contribution to GDP, number of people it employs, how many assets are under management.” But these metrics don’t measure **whether people’s lives are actually getting better**. Reframing how we measure success will help support the outcomes that matter most.

Some of the structures created to support philanthropy can also hold back progress. For example, Bernholz sees some mutual aid groups becoming nonprofits. “This is a disaster,” she says. “Mutual aid is a horizontal structure, a group of people

with equal power making decisions, and the accountability is internal. Nonprofits are exactly the opposite—they're vertical, hierarchical, and their accountability is designed externally.” The [501\(c\)\(3\)](#) structure isn't going to fit all philanthropic groups. Finding ways to provide resources and tools to these groups without overtaking their missions will be important in supporting this work.

What gets lost sometimes is why people give. Most of all, folks want to support the **people and institutions that show up for**

**their communities.** Bernholz says that the focus on the tax code often obscures this. In reality, only 8% of donors care about the nonprofit status of the organizations they give to. This was particularly evident during the pandemic when people gave to local restaurants, bookstores, and neighbors alike.

Asking what people need and what makes their lives better will help drive how we measure success across philanthropy. It will also help determine which structures we dismantle and which ones we build.



Photo from Stanford University's Center on Philanthropy and Civil Society

## 2 Equity is a priority

### **BRENDA SOLORZANO**

CEO, [Headwaters Foundation](#)

Brenda Solorzano has spent her career working in the philanthropic sector, taking on the role of program manager, CEO, and everything in between. She sees local collaboration as a key component to making meaningful change.



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HER ADVICE:

**Share power to support equity**

## 1. Reimagine what it means to be a funder

To support equity, Brenda Solorzano believes the first step is for funders to radically reimagine their role. “The way we’ve always done it doesn’t have to be the way we always do it,” she says.

The main recalibration is around who holds the power. Solorzano encourages funders to find ways to cede or share power with the people, organizations, and communities historically denied a seat at the table. Though many foundations get input from the community, that isn’t enough. To achieve meaningful, lasting equity, the **decision-making power really needs to shift**.

It’s worth noting that this work takes time. “People want the quick checklist—give me the three things I need to do to become more equity centered,” Solorzano says. “It doesn’t work that

way; there is no checklist.” She encourages foundation leaders and employees to look at everything they do through an **equity lens**. It’s not only about grantmaking, but also how priorities are set, who sits on the board, and how spending and investment policies are determined.

## 2. Let communities set priorities

When the Headwaters Foundation set out to create an agenda for how they would address community needs, they did not go the “usual route”—hiring a consultant. Instead, Solorzano and her teammates went out into the community. They spoke with any community members who would talk to them. In the end, they had about 600 conversations.

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**The way we’ve always done it doesn’t have to be the way we always do it.**

**BRENDA SOLORZANO**





“We talked to everyone from high schoolers to hospital CEOs and everybody in between,” Solorzano says. From these conversations, the Headwaters team pulled out a list of themes the community cared about most.

To narrow the focus further, they hosted a meeting in every county they would serve. With an open invitation, anyone could come give input. Solorzano and her team presented their findings from the hundreds of conversations they had, and let community members make the final decision. That’s how they wound up centering their work on early childhood development.

### 3. Move with urgency

In philanthropy, a huge [bureaucracy](#) has been built to help teams make decisions about who should get money. This can be incredibly frustrating for nonprofits. They put in hours to apply for a grant and wait months to hear back. Sometimes they don’t get funding and if they do, they have to wait even longer for the check to arrive.

At the Headwaters Foundation, the team sought to cut out the long wait times, which don’t serve anyone. “If you’re mission aligned, we should be supporting you,” Solorzano says. Rather than a complicated grant application process, they expedite grantmaking by modeling the application process after a credit card approval process. It’s semi-automatic, allowing grantees to submit basic pieces of information. The process takes five minutes to apply, and a general operating grant is approved within 24 hours.

Not only does this urgency cut down on wasted time, but it levels the playing field and helps build relationships. “The stories we’ve collected of the work that’s being done with these general operating grants—**it’s transformational in many of these communities,**” Solorzano says. “And these are communities that don’t have big infrastructure, don’t have large nonprofits, don’t have development people. They’re the kind of people who wouldn’t be as competitive in a traditional application process.”



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HIS ADVICE:

**Think about long-term  
impact**

## **3 Philanthropy needs to prepare for the next big disruption**

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### **CHRIS HOBBS**

COO, [Arabella Advisors](#)

From his experience working closely with nonprofit organizations, Chris Hobbs has seen what it takes to make lasting change. He believes in building strategy with an eye on the future.

## 1. Embrace policy advocacy

Philanthropy is often reactive, responding to communities in need or in crisis. Chris Hobbs believes this work is important, but he sees an opportunity for funders to **prioritize prevention** as well. [Policy advocacy](#) is a key way for organizations to work to minimize problems on the front end.

For example, providing services and resources to unhoused people is important. But how much further would your impact go if you also worked to address the policies that created the conditions for homelessness in the first place? Hobbs sees more and more funders supporting both community programs and advocacy work.

Policy advocacy can enable large-scale, transformational change. It's what will help society at large prepare for future crises. Hobbs encourages foundations to get invested in this work now—which means getting board members and donors excited about the idea. As he puts it: “Systems change equals policy change, so **get comfortable with policy change.**”

## 2. Build sustained relationships

Across philanthropy, it is common for funders to constantly

pivot as new needs emerge or crises hit. While surveying the landscape, funders are always looking for ways to make the biggest difference for communities in need. The drawback? Hobbs believes that this frequent reshuffling of priorities can undercut the power of **sustained relationships**.

Building stable, long-term partnerships with community organizations and grantees will allow philanthropy at large to better respond when crises hit. Hobbs points to the big disruptions of the past two years as an example. “Some of philanthropy saw that it didn't have relationships in the right places to affect change,” he says.

Of course, funders want to continue to respond to sudden shifts, but making the effort to invest and stay engaged in existing relationships will build a much stronger foundation for the future. Further, Hobbs encourages grantmakers to **see grantees as partners** rather than entities to be invested in.

## 3. Avoid duplicating efforts

Funders often try to respond to pressing community needs. Though this work requires urgency, Hobbs advises finding a balance between that push to make change quickly and the

necessity of understanding the landscape. Sometimes peoples are so eager to get started making an impact, they miss essential work on the front end.

In particular, Hobbs advises taking time to understand what existing efforts already address the issues you care about.

Starting a new organization takes a lot of resources. If there's already someone out there doing the work, your efforts might be better spent supporting or partnering with them rather than starting a brand new program. As Hobbs puts it: "Before you create new and different, **do you understand the need for new and different?**"

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**Before you create new and different, do you understand the need for new and different?**

**CHRIS HOBBS**





## 4 Community partnerships are more important than ever

### MARCELLA TILLET

Vice President of Programs and Partnerships

[Brooklyn Community Foundation](#)

Overseeing the Brooklyn Community Foundation's strategic grantmaking and community leadership, Marcella Tillett understands the dynamics that shape relationships between community organizations and funders. She sees strong partnerships as the bedrock of effective philanthropy.



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HER ADVICE:

**Center voices from the community**

## 1. Build a listening practice

Making space for community members to share their perspectives is the first step in establishing trust. “Our approach at Brooklyn Community Foundation always starts with listening,” Tillett says. “Not only does this develop an open line of communication with our communities, it creates the space for more people to enter the conversation.”

Brooklyn Community Foundation formalized their listening practice by launching [Brooklyn Insights](#), a community engagement project, in 2014. This program helped the foundation connect with area residents, who were able to share their concerns about community challenges, as well as their visions for the future.

Hearing directly from community members allows the Foundation to set priorities based on **residents’ lived experiences**. Tillett emphasizes the importance of listening with intention. “We’re not just listening to hear, but listening to take direction,” she says. Brooklyn Community Foundation uses information from these conversations to prioritize resources for grantmaking, as well as determine how they engage with the media, what issues they highlight, and how they shape their capacity-building strategies.

Listening also requires understanding which voices you want to elevate. Brooklyn Community Foundation applies a racial justice lens to all of their work. This shapes who they seek feedback from. Tillett explains that they aren’t interested in hearing from everyone. The foundation team makes it a priority to connect with the **people facing the most harm from systemic oppression**.

## 2. Incorporate a participatory framework

Listening to the community is essential on the front end, but there should also be a mechanism to involve community members in decision making. For Brooklyn Community Foundation, that means leaning into [participatory grantmaking](#). Community members are involved in determining which organizations get funding from the foundation.

**Transparency** is a big part of the practice for Brooklyn Community Foundation. Team members are intentional about sharing information with the community. “We really try to be in a partnership as equals,” Tillett says. To that end, the Foundation team stays open about what they do and how they do it. And they continually ask for feedback and make recommendations based on what they hear.

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**We’re not just listening to hear, but listening to take direction.**

**MARCELLA TILLET**

Applying a participatory approach doesn’t have to happen all at once. For Brooklyn Community Foundation, it made more sense to start incorporating this model into certain programs first. When that proved effective, they made the commitment in 2019 to establish advisory councils for all of their portfolios.

### **3. Ask the hard questions**

Being in a position of power means that you get to set a lot of parameters around the relationships you build. Because of this dynamic, grantees are rarely in the position to question your practices. That’s why it is imperative that funders take it upon themselves to ask the difficult questions about why and how they do their work.

For many folks Brooklyn Community Foundation works with, past relationships with institutions have been extractive. People have come into the community with the intent of getting something out of it. Understanding context and asking how your work is a

part of that experience for people is a big step. Tillett explains that her team is always clear with constituents about where and how the Foundation applies the learning they do within the community—too many times researchers have come in to do a study and then applied the benefits of that work elsewhere.

One of the main questions Tillett recommends asking is, “**In what ways do we show up that are harmful?**” Acknowledging that harm happens in funder/grantee relationships is the only way to move toward repair. “Asking this question is a way to shift power because you’re asking the person or organization you’re in a relationship with to actively continue to create what the bounds of that relationship are,” Tillett explains.

Don’t be afraid to ask questions and accept feedback—it can only strengthen your organization’s reputation. Tillett says that their grantees are often the ones who amplify the foundation’s message and help the team reach new organizations.



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THEIR ADVICE:

**Get strategic about tech**

## 5 Tech is no longer a standalone initiative

### AMY SAMPLE WARD

CEO, [NTEN](#)

With experience in direct service, as well as with policy, philanthropy, and capacity-building organizations, Amy Sample Ward knows how important technology can be for social change. They note an opportunity to bridge the gap in the nonprofit sector by taking a new approach.



## 1. Change your relationship to tech

From their vantage, Amy Sample Ward sees plenty of opportunities for organizations to better leverage technology. The best part? Much of their advice costs nothing. As Ward puts it: “The size of your budget does not determine whether or not you’re going to be successful with technology.”

Getting strategic about how you budget for and understand the role of tech in your work is the first step. Ward advises budgeting for technology on its own rather than lumping it together with other supplies. This allows you to make intentional decisions and truly understand **the power of the investment** you make.

Ward also encourages everyone to take time to articulate how technology fits into their [strategic plan](#). Putting effort into understanding how technology supports your mission will help you make decisions about where to invest time, money, and resources. It’s also essential to have someone responsible for tech management placed on the leadership team. This ensures that technology is incorporated into your organization’s plans in a holistic way.

## 2. Focus on people

It’s easy to forget that [technology is about people](#). Ward believes this is an important piece of doing tech right. First and foremost, conversations about tech need to be inclusive. Everyone on the team should feel like they have the resources and tools to use technology effectively. The decision-making process should be collective, and everyone should get training.

Make sure everyone can participate in the conversation, whether it’s an internal discussion of your workflow or a dialogue with community partners. Avoid terminology that alienates people. Instead, frame the conversation around ideas that are easy to understand and engage with. To this end, Ward recommends talking about technology in terms of how it serves your mission. For example, rather than getting caught up in the technical details of how an API works, explain what the tool allows you and your community partners to do or how it changes your processes.

And prepare for resistance to change. Ward explains that technology is always changing—and so **tech management is often about change management**. “A lot of the time, we’re not



**The size of your budget does not determine whether or not you're going to be successful with technology.**

**AMY SAMPLE WARD**

talking about technology, we're talking about human psychology and getting people to agree," they say.

### **3. Get smart about your data**

These days, many organizations are trying to understand how data fits into their mission. When measuring impact, Ward cautions against being too driven by arbitrary numbers. They advise taking a step back and ensuring proper intention and strategy around your approach to data.

For the nonprofit sector, getting smart about data starts with [data collection](#). We can't talk about how to leverage data if

organizations don't have the right pieces in place to collect and manage the information they need. Ward suggests asking these guiding questions:

- What data are we going to collect?
- How are we securing it?
- Who gets to access it?
- What do we want to do with the data once we have it?

You also need to determine who on the team will be responsible for accessing and managing the data. "Even if you're collecting great data, if no one can access it, it's not useful," Ward says.

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**Chantal Forster**

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## 6 Power imbalances are shifting

### DAVID CALLAHAN

Founder and Editor, [Inside Philanthropy](#)

David Callahan, author of seven books, founded *Inside Philanthropy* in 2014 to pull back the veil on the world of giving. To move the field forward, he thinks relationships between funders and grantees need to be recalibrated.



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HIS ADVICE:

**Build relationships rooted  
in trust**

## 1. Prioritize multi-year general operating support

More funders are looking for ways to ease the burdens on their grantees. “The easiest thing to do is to shift from giving project support to giving general operating support, and to shift from a one-year grant to a two- or three-year grant,” David Callahan says.

Providing [general operating support](#) puts the decision-making power in the hands of the grantees. Rather than being told how to use the money they get, these teams can make the investments they believe will best support their work—whether that’s more employees, new technology, training, facilities, or something else. This is a huge step in **building capacity** and **increasing flexibility**.

General operating support also helps nonprofits react quickly to community needs. “Grantees only have as much nimbleness as funders give them,” Callahan explains. When community organizations have latitude to make decisions without seeking funder approval, civil society as a whole is better prepared to react to sudden changes or crises.

## 2. Speed up the process

“I think for nonprofits it can be really agonizing to wait around for months and months just to get a meeting with a foundation and wait around for a couple months after that to know if they’re going to get funding,” Callahan says. He believes that cutting down on this wait time would benefit everyone.

For example, are there ways you could make your grant application process simpler and more straightforward? Consider:

- Do you ask for the same information in multiple ways?
- Do you require grantees to provide publicly available information?
- Can you leverage technology to speed up the review process?
- Can you deliver funds faster?

Callahan believes that accelerating these processes not only will allow for a more effective crisis response, but will also help **strengthen the relationships** between funders and grantees. When foundations show that they value organizations’ time and resources enough to move with urgency, that inspires trust.



### 3. Understand the limits of evaluation

Trust-based practices also require striking the right balance during impact measurement and evaluation. As a funder, you want to know that your contribution is making an impact. But you also need to acknowledge the limits of what can be measured.

Callahan recommends **looking holistically** at whether an organization is making an impact rather than trying to parse out very specific metrics around each program. He also encourages trust in the nonprofit leaders. If you give unrestricted funding, you might not be able to draw a straight line from your gift to clear outcomes. That's okay. Trust the organization to know what's best. And if they say that they are making an impact, **be inclined to believe them.**

"There are limits to how much funders can have a micromanaging approach to evaluation, given the nature of this work, especially if it's related to policy and advocacy, where the results are just really hard to measure," Callahan says. An organization might do everything right, but outside factors could render their advocacy ineffective in advancing new policy. That doesn't mean the work should be abandoned.

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**Grantees only have as much nimbleness as funders give them.**

**DAVID CALLAHAN**



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HER ADVICE:

**Take a holistic approach**

## **7 Movements and identities are intersecting**

### **LORI POURIER**

President and CEO, [First Peoples Fund](#)

Since 1999, Lori Pourier has served as the president of the The First Peoples Fund, finding ways to support Indigenous artists and culture bearers. She believes that philanthropy needs to honor both the economic and human components of giving.

## 1. Understand the ecosystems within communities

When Lori Pourier talks about First Peoples Fund, she starts with the history of Indigenous people. To understand the work, it's essential first to **appreciate the identities and experiences of the people the organization serves**. Pourier says for those outside the tribal community, it's about taking time to learn and letting go of the things you think you know. She wants people to understand what has been extracted from Indigenous communities over hundreds of years and how that reality shapes the work of artists and culture bearers today.

Not only is historical context important, but First Peoples Fund seeks to honor the full human identities of the people it serves. Rather than focusing only on the work artists do, the organization supports them as community and family members. "We begin with the household—the individual within the family," Pourier says. "And we know that if the family's stronger, it will ripple into the community. And from there, it ripples wider into the whole tribal nation."

Pourier's advice to funders is to educate themselves and understand the full ecosystems within BIPOC communities.

It's not just about the economic impact. She advocates for understanding and honoring the **cultural values** and the **informal systems** that already exist, yet are often not recognized. For First Peoples Fund, it's about returning to this core question: **"How do we remain rooted in community?"**

## 2. Focus on leadership and education

Sometimes funders are so caught up in making an immediate impact, they overlook opportunities to make more lasting gains. Leadership development and community investment are long games, but their potential impact is huge.

Pourier has seen first-hand what mentorship can mean. In the mid-1990s she served as the executive director of the Indigenous Women's Network. One of their focuses was building leadership experience for native women through a mentorship program. "Young women would work alongside the women doing really critically important work in tribal communities, building their own nonprofit organizations and then we would place them inside a national foundation so they could better understand the philanthropic sector," Pourier says. This program empowered a whole generation of Indigenous women to take on leadership roles and influence philanthropy within native communities.

As more organizations are looking to support equity, **building leadership capacity and supporting alternative models of community investment** should be a big part of the conversation. Pourier has watched the Indigenous women who started in that mentorship program over thirty years ago develop into incredible leaders who are driving systemic change today.

### **3. Build coalitions**

For Pourier, a lot of work at the Fund revolves around sharing stories and connecting with others. Native people have been subjected to so much erasure and invisibility. She sees incredible power in giving voice to the history and experiences of Indigenous communities.

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**We begin with the household—the individual within the family. And we know that if the family’s stronger, it will ripple into the community. And from there, it ripples wider into the whole tribal nation.**

**LORI POURIER**

Pourier also sees this openness as the **foundation for collaboration**. Over the years, First Peoples Fund has sought out opportunities to connect with BIPOC-led organizations and other like-minded cultural practitioners. At first, they connected during meetings with funders. “We found ourselves in a Ford Foundation meeting with other organizations of color,” she says. “We found ourselves meeting separately from our cohort, discussing how the tools we were being offered would look much different within our communities—in Utica, Mississippi or on the Pine Ridge Reservation. Although we were given tools to consider, they couldn’t be replicated in our communities—it wasn’t going to work.”

By finding where their work overlapped, First Peoples Fund connected with like-minded organizations that also center cultural practitioners. These conversations helped spur the founding of the [Intercultural Leadership Institute](#), which brings together organizations like [Sipp Culture](#), the [Pa’i Foundation](#), the [National Association of Latino Arts and Cultures](#), and [Alternate Roots](#). The institute seeks to develop cultural leaders and foster relationships while disrupting dominant social norms that can hold back progress.

Pourier emphasizes the importance of being in a room together to make these connections. She encourages community organizations to seek out others with similar missions. And for funders looking to facilitate these connections, sometimes it’s about bringing people together and then stepping back.



Photo from First Peoples Fund



## 8 Accessibility is a key component of equity work

### JENNIFER LASZLO MIZRAHI

President, [RespectAbility](#)

As an advocate for the disability community, Jennifer Laszlo Mizrahi is focused on inclusion and empowerment. She sees accessibility as the key to unlocking the potential of many people who have been marginalized.



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HER ADVICE:

**Incorporate disability into  
your DEI efforts**

## 1. Get serious about inclusivity

Jennifer Laszlo Mizrahi is encouraged by the urgency around equity that has developed over the past couple of years. But she's noticed a big omission in the work. "The vast majority of DEI efforts have not included disability at all," she says.

The good news is that **improving accessibility** can be easy and sometimes even free. But organizations have to pay attention. They need to consistently ask themselves how accessibility is being addressed in both their internal and external work. Are captions enabled in Zoom meetings? Are event locations wheelchair-accessible? Are websites designed to be used by people who are blind or have low vision? Too often no one bothers to ask these questions on the front end and big portions of the population are left out.

But it's not just about who can access information or attend an event. Mizrahi points out that accessibility is also about who is part of the conversation and who holds the power to make decisions. Philanthropy has a problem. [1 in 4](#) adults in the United States have a disability, but according to a [recent survey](#) less than 1% of foundations have even one person with a disability on their full-time staff.

## 2. Reframe the conversation

Too often, people don't consider how much talent people with disabilities can contribute. "There are really incredible people with disabilities who are ready to lead on behalf of the disability community and others," Mizrahi says. It's a disservice to everyone to leave those with lived disability experiences out of the work. Perhaps organizations wouldn't struggle so much to prioritize accessibility if they included in their staff and leadership people who best understand its value and how to make it happen.

Mizrahi highlights the fact that many disabilities are not visible to the naked eye. Mental health and chronic pain should be part of the conversation. She also reminds us that there is no hard border between the disabled community and the rest of society. As people age, they may lose their hearing or vision. And accidents and illness can reshape bodies and brains in profound ways. Advocating for inclusion is everyone's work.

As an organization, RespectAbility is focused on solutions rather than simply calling out problems. There is a valuable lesson here for anyone doing equity work. "There are a lot of groups who are under the impression that marginalization is an identity," Mizrahi says. "We know that marginalization is a problem that

can be solved.” Seeking to **call others into solution-building efforts** has helped increase access and get more voices and leaders engaged in this work.

### 3. Track the data

One big omission that Mizrahi has noticed in the discussion of disability and access is around data. Though many organizations are ramping up efforts to track metrics related to diversity, disability is not often included. Mizrahi encourages organizations to start tracking this information. That’s the only way to get a clear picture of whether progress is being made.

The other benefit of creating an avenue to collect this information is it gives folks the chance to speak up, even anonymously. “A lot of people who are working might have a disability but might not

be self-disclosing due to stigmas,” Mizrahi says. “They might not be asking for an accommodation that could help them perform better in their roles.” For instance, someone on your team might benefit from captions in virtual meetings. Imagine catching only 50% of what your colleagues say. That would make it incredibly hard to do your work well and feel like a part of the team. When you collect data around disability and accessibility, you’ll have a better sense of what people need to do their jobs, and you can take action to make those accommodations available for all.

Without data, it’s also difficult to understand the full scope of the benefits of inclusivity. Of course equity itself is a worthy goal, but a [recent study](#) found that companies with good disability inclusion financially outperform those without.

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**We know that marginalization is a problem that can be solved.**

**JENNIFER LASZLO MIZRAHI**



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HER ADVICE:

**Change the culture of  
nonprofit work**

## 9 The people doing the work need support

### **CARRIE AVERY**

President, [The Durfee Foundation](#)

Carrie Avery has spent her career seeking out strategies to help philanthropy make a bigger and more meaningful impact in communities. Right now, she sees an opportunity to move away from the burnout pace of the nonprofit sector.

## 1. Move away from burnout culture

Nonprofit work has become notorious for its [burnout culture](#). Carrie Avery sums it up this way: “It’s as if you’re not dedicated to the cause unless you’ve sacrificed everything at the altar of the cause.” People are expected to work at an incredible pace, often without the tools they need, and for pay that doesn’t match their skills or experience. Not only is this unsustainable for those doing the work, but many talented people are dissuaded from joining the sector altogether.

Avery believes it’s time to shift away from the burnout culture that often pushes leaders so far past the brink, they leave the sector. Because when people leave, they take their expertise and institutional knowledge with them. And it’s difficult to **build lasting relationships and create meaningful change** if organization leaders are starting from scratch every few years.

Avery also points out that putting people under that much strain doesn’t result in good outcomes. People don’t make good decisions when they are exhausted. They don’t have the time or energy to get creative in developing long-term solutions. And these are leaders working to address some of society’s biggest issues. At the very least, they should be equipped to bring their best selves to the work.

## 2. Focus on the people behind the work

Part of the focus at the Durfee Foundation has been to center the people doing the community work. One big way they’ve done that is through their [sabbatical program](#), which provides support for nonprofit leaders to get a three-month break from their work for personal rejuvenation. “It’s building in a culture of care and a normalization that people need rest and renewal,” Avery says.

By providing a sabbatical, the Durfee Foundation [helps effective leaders stay in their roles](#). This builds **stability and sustainability** for everyone. In fact, the foundation did a 20-year [retrospective study](#) to assess the impact of the program and found that the investment offered remarkable returns not only for the leaders, but for the organizations and communities at large.

One of the requirements of this sabbatical program is that interim leadership must come from inside the organization. This develops the [leadership capacity](#) and skills of the rest of the staff. Often when a leader returns from a sabbatical, there is a permanent shift in work-life balance for everyone. The break gives the whole organization a chance to reimagine their practices and reshape their cultures. Leaders are able to let go of some of the daily management tasks and focus more on long-term planning.



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**It's building in a culture of care and a normalization that people need rest and renewal.**

**CARRIE AVERY**

After seeing first-hand what a break can do, many organizations who've received sabbatical support from the Durfee Foundation have gone on to institute their own sabbatical programs for their staff. For organizations that are struggling to shift away from a burnout culture, Avery recommends finding ways to build in new practices that **support rejuvenation**. Maybe that looks like a short sabbatical or maybe it's about shifting the expectation around working hours.

### **3. Concentrate on empowerment**

One big reason that burnout culture has been allowed to proliferate so thoroughly is the power imbalance between funders and grantees. Often grantees don't feel able to ask for what they need. Instead their pace and workload is dictated by the funders. Avery believes this dynamic needs to be recalibrated. "I want the nonprofits to feel empowered to tell funders, 'no, this is too much,'" she says.

Incorporating [trust-based practices](#) is a big step toward reshaping the funder-grantee relationship. By operating with trust, funders can empower nonprofits to set the pace and scope of their work. For the Durfee Foundation, building trust into their processes is ongoing work. "It's about **changing culture**," Avery says. "The practices are a manifestation of the culture change."

Part of changing the culture will be normalizing conversations around work-life balance and setting reasonable expectations for nonprofit employees. Providing general operating support is a great way to put your money where your mouth is as a funder. It gives the nonprofit team the opportunity to direct the resources as they see fit. By giving these people the tools they need—whether that's training, technology, new facilities, or more payroll—you empower them to do their jobs well and stay engaged in the work.

## 10 Collaboration is key

### JIM FRUCHTERMAN

Founder and CEO, [Tech Matters](#)

As a serial tech and social entrepreneur, Jim Fruchterman has been a part of large-scale transformational change in both the for-profit and nonprofit sector. He sees relationships as an essential component for effective growth and evolution.



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HIS ADVICE:

**Find the right tech  
partners**

## 1. Center the mission

Jim Fruchterman has seen first-hand how philanthropy's [squeamishness about funding technology](#) holds the sector back.

"The social sector by and large is a decade behind on how it applies technology," he says. "But in this day and age, to make an impact, you have to be strategic with technology."

Technology done right increases the capacity of nonprofits to do good for more people.

"Take time to explain technology as it relates to mission," Fruchterman says.

**How does tech allow you to do more good?** It might be about freeing your team up from administrative tasks so they can do more relationship building in the community. Or tech might allow you to reach more people, increase accessibility and equity, or deliver resources faster.

Framing your investment in technology around your mission will not only help you get your team and leadership on board, it will ensure you're making the right investments. No one wants to

pour resources into a solution that doesn't fit the work.

## 2. Avoid the "cult of the custom"

Fruchterman has noticed a trend of organizations trying to create custom tech solutions for themselves.

"I see million-dollar-a-year nonprofits who think they are so magically unique that they need someone to write some custom software," he says. "This is a lengthy and expensive process. If you're the only customer, you're the only one paying for maintenance. And in the end, the solutions don't work all that well."

Although it's easy to get caught up in what makes your organization unique, Fruchterman advises looking for the ways your technical processes overlap with others in the sector. Likely a lot of other organizations have similar needs and practices. Rather than starting from scratch, you can leverage solutions that already exist.

## 3. Leapfrog the "trial and error" of evolution

Teaming up with a tech partner allows you to benefit from the evolutions that happen in the for-profit sector without having

to fund the research and innovation that goes into them. Often technology companies are able to take risks and try new things. They have the capital to invest in development, and the capacity to continually improve.

Trying to make technological leaps on your own can be difficult. Most nonprofits don't have the resources to build and test their own technology. But you don't have to let that hold your organization back.

Leveraging partnerships lets you tap into the solutions you need.

"It's about moving organizations forward, but not to the bleeding edge of tech," Fruchterman says. "It's about adopting proven solutions."

For instance, much of the nonprofit sector still uses 1-800 hotlines. Enabling text messaging is not a cutting edge advancement, but it has the potential to add a lot of capacity and reach more people.

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**In this day and age, to make an impact, you have to be strategic with technology.**

**JIM FRUCHTERMAN**

## A time to look forward

The next era of philanthropy will be defined by the people and organizations willing to embrace change. As you look to craft new strategies, shift your culture, and refresh your practices, you want to do so with a focus on the people at the heart of the work.

This guide is not meant to be the end of the conversation. It's the beginning. The advice from these experts is a starting

point, a way to give shape to a new future for your team, your organization, and the philanthropic sector as a whole. Because when it comes to evolving, the work is never really done. It's a constant process of questioning assumptions, seeking feedback, and reimagining the way you do your work. As Carrie Avery of the Durfee Foundation puts it: "You have to be comfortable with the fact that you'll never arrive."







Photo from First Peoples Fund

## The right software to meet the moment

As you look to incorporate some of these principles and practices into your work, you want to have a solution that can support your whole team. Submittable is a [social impact platform](#) designed to streamline your processes and spur collaboration.

Find out more about how Submittable can help you:

- Build relationships
- Increase your capacity to do more good
- Operate with equity and transparency
- Move with urgency

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