



# Collaborating for Greater Influence and Impact

How collaboration, advocacy, and an “equity lens” are reshaping philanthropy

**E**ven as we head into 2022, the effects from the pandemic and events of 2020 continue to be felt, particularly in the philanthropic community. In this vibrant conversation with Glen W. Johnson, President of FOX, Bruce Boyd, Principal and Senior Managing Director of Arabella Advisors, Nancy Roob, CEO of Blue Meridian Partners and President and CEO of The Edna McConnell Clark Foundation, and Nick Tedesco, President and CEO of the National Center for Family Philanthropy, we discuss four separate-but-related issues.

- Continuing trends coming out of 2020
- Increased donor collaboration in leveraging resources and tackling the most daunting issues
- Incorporating an “equity lens” in your family’s giving
- The growing use of advocacy and education to create support and increase awareness.

**GJ:** In last year’s *Foresight* we discussed various philanthropic trends arising from the pandemic, including trust-based giving, accelerated grantmaking speeds, increased collaboration among grantmakers, and a shift in giving to areas most affected by the pandemic. Separately, the murder of George Floyd drove deeper conversations around diversity, equity, and inclusion. Did you see these same trends, and have they continued?

**NR:** Absolutely. The multiple crises of 2020 intensified the urgency of the social sector’s work and pushed philanthropists and social sector leaders to be more nimble and work differently. The continued slow progress we are seeing through 2021 highlights the need for us to redouble our efforts in supporting approaches that work, and driving greater resources to social sector leaders. I worry we’re losing the momentum that COVID-19 and our nation’s racial reckoning brought to the fore in 2020.

This conversation picks up with Nick Tedesco of the National Center for Family Philanthropy where we left off in the 2021 edition of *Foresight*.

Read that discussion with Nick and Jacqueline Valouch, Head of Philanthropy at Deutsche Bank Wealth Management, [here](#).

## The philanthropic sector has experienced significant shifts in its pace, its practice, and its purpose.

– Nick Tedesco

Across the board, it's clear we can't disentangle racial inequities from any problem we seek to tackle... education, employment, the health of people and their communities, and so on. I think philanthropists more and more are embracing the notion they can't achieve the impact they seek without centering racial equity in their giving strategies. In a similar vein, nonprofits are taking major strides forward in committing to equity in their leadership, staff, and board composition, in addition to their program strategies.

**BB:** The murder of George Floyd and the attention it generated created more awareness than ever of equity concerns and deeply affected the philanthropic community. The pandemic also surfaced many equity-related issues in terms of how different racial communities experienced COVID-19, and had different access to medical care. As a result, our clients increasingly are bringing an "equity lens" to their work. It's not just about which organizations they may support – equally important and often overlooked is the "how." How do you show up as a grantmaker? How easy is it to access your resources? Who's making the decisions? Are you, in an authentic way, incorporating the voices of affected communities? The overall goals shifted to making funding more accessible and including additional voices in the decision-making process.

**NT:** Not only are we seeing those trends affirmed, but the philanthropic sector has further experienced significant shifts in its pace, its practice, and its purpose. Families are accelerating the pace of putting capital back into the community, and recognizing the need to transform systems impeding progress. In their practices, families are understanding the need to be proximate to community, and to make more fully informed decisions by bringing in independent or community board members, leveraging advisors, and using intermediaries such as community foundations or other partners. Families also are thinking about how to diversify their foundation staff to ensure a more equitable grantmaking experience.

Another shift in practice involves collaboration – understanding that philanthropies need to partner to ultimately accomplish the objective of transforming systems and meeting the very urgent and timely needs at present. And we also are seeing what Bruce mentioned, a shift in how families apply the lens of racial justice – and racial equity more specifically – into all their work, not just looking at it as an issue to support.

### **GJ: Diversity and equity have been challenging for families to discuss given the emotional nature of the topic. How are families managing that conversation?**

**BB:** Even in the best-functioning families, these are often charged and difficult conversations to take on. Having a neutral, informed partner, someone who can do confidential interviews and help the family surface and address issues and areas of contention in a productive

way, can be very helpful. It's no different than other situations where family members may be "speaking different languages," such as when engaging the next generation.

**NT:** We see many families bringing in facilitators to talk through what it means to incorporate a commitment to diversity, equity, and inclusion in their grantmaking and governance, and how to orient toward a place of justice. This often centers around a conversation about effectiveness. In order for philanthropic capital and philanthropy to be effective they must account for equity and orient toward justice.

**GJ: Collaboration has been mentioned as a way for families and groups to come together to tackle large, systemic issues. What factors are prompting this activity?**

**NT:** Necessity is certainly a critical factor in terms of the pandemic and racial justice, but also the systemic issues arising from both. When the pandemic emerged in March 2020, tremendous capital was required to meet immediate needs. Those funds also served as the innovation capital to test some solutions, such as vaccines, and ultimately treatments and treatment protocols. Yet very few people have experience addressing these issues. Intermediaries emerged who were experts in vaccines, delivery, and other pandemic-related needs. Donors, wanting to put their capital to work quickly, looked to the guidance of these intermediaries to do so in a more leveraged and efficient manner.

This approach was reaffirmed throughout the racial justice movement. It was an opportunity to invest in leaders, in communities, and in movements best able to strengthen communities to do their best work. There was also a recognition in both situations that we need to rebuild systems if we're going to see enduring change in communities and across these critical issues. To do so we need a coalition of partners to fund alongside each other, learn from, and partner with one another.

**BB:** We now see a level of collaboration within philanthropy we have not seen before, which is really encouraging and makes a lot of sense. You have an ability to leverage your resources, to learn together, and incubate new ideas.

We work closely with a group of nonprofit intermediaries that host dozens and dozens of donor collaboratives focused on issues ranging from marine conservation, to reducing gun violence, to early childhood education, and all sorts of efforts. Donors come together to work together to affect the issue they care about. Typically they start with one or two founding donors, who often are experienced donors in a particular space, and then it will grow from there.

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**NR:** Collaborative giving has been on the rise for a number of years, but the collective sense of urgency philanthropists felt due to the devastation of the pandemic boosted interest in collaboration significantly. We experienced new capital flow from philanthropists wanting to step up and give in a bigger way given the pandemic's effects. Overall, though, even with philanthropists' desire to give in a bigger, more immediate way and the progress we've seen, it's still vastly subscale relative to the huge needs we face in this country. Against that backdrop, I think it's the responsibility of all philanthropists to challenge ourselves in asking – are we doing all we can? How can we be better at supporting leaders, especially leaders of color? What new structures and vehicles need to be built to help facilitate more impactful and equitable philanthropy and enable those social sector leaders on the front lines to access right-sized capital?

**GJ: What are some of the benefits of collaborative giving?**

**NR:** The most critical benefit is impact. Families are finding you can accomplish so much more, and much faster, by working in collaboration. Very few of us can make the kind of scaled investments that transformative impact requires by going out on your own. Pooling resources also allows you as a philanthropist to take on greater risk and provides greater ability to see your resources have more significant impact. Another benefit of collaboration is being able to join a community of peer philanthropists, and the cross-learning that facilitates. Many of our partners have significant grantmaking activities independent of our platform. Their efforts inform and strengthen our work together, and vice versa.

**GJ: What are the critical factors that lead to the success of a collaboration?**

**NT:** The success of any collaboration requires communication and governance. Donors must commit to open, honest, and equitable channels of communication. And there must also be defined governance practices to ensure it's clear how decisions are made and by whom. And the relationships must be continuously nurtured.

**NR:** Effective partnering requires a willingness to share in the decision-making in pursuit of greater impact. It also demands all parties come into the work with a learning mindset. If you enter thinking you have all the answers, you can't be an effective partner. The opportunity to engage with social sector leaders, experience their work first-hand, and learn from that exchange is what drives a learning community and effective collaboration.

**GJ: What role is the next generation playing around collaborative giving?**

**BB:** It's very interesting to see how the next gen – both millennials and Gen Xers – think differently about philanthropy, in terms of impact investing and the partnerships with their preferred nonprofits and donors. We find

that many are more interested than their predecessors in using different types of giving and impact vehicles, from donor collaboratives to fiscally sponsored projects hosted by intermediary organizations, akin to what Nick described. They also tend to be much more attuned to equity issues and more focused on systemic change that involves advocacy.

**NR:** Newer generations of philanthropists are eager to learn from the past to have greater impact and be able to pivot rapidly. I think that's one reason younger generations are seeking alternatives to the traditional endowed foundation model. And it's why we're seeing the rise of collaborative/pooled vehicles and experimentation with non-foundations, such as 501(c)(4)s and limited liability companies.

We see this momentum and interest continuing to build, which is exciting. We believe this movement is a critical mechanism for unlocking far greater flows of capital that can be deployed to the greatest effect.

**GJ: How has advocacy's role within philanthropy changed over the past decade?**

**BB:** Advocacy certainly has been around for a while. But its activation accelerated during the systemic failures of the pandemic and the equity issues that became apparent to more people than ever following the murder of George Floyd. It's important to understand that advocacy can include a wide variety of tactics and is often focused on education rather than lobbying. In many cases, it's not about seeking to influence a particular piece of legislation but educating and advocating for an issue – even with policymakers.

**NT:** Advocacy is a critical component to philanthropy's success. It's important for philanthropic families to reflect on how they might use their voice, their influence. It's a recognition that, without using our voices to advocate for change and to think differently about how systems are or are not working, then we're not likely going to see the needed changes. Particularly among the next generation, advocacy as a tool is important, and one the next generation feels very comfortable using.

Like just about every other industry, the philanthropy world is experiencing its own (rapid) evolution following the events of 2020. We encourage you to discuss among family members the forms collaboration, equity, and advocacy might take within your own philanthropy. And as always, don't hesitate to contact FOX should you need help facilitating such a conversation.

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**Bruce Boyd** is a Principal and Senior Managing Director of Arabella Advisors. Bruce works with Arabella's individual, family, foundation, and corporate clients, helping them effectively and efficiently deploy philanthropic and investment capital for good. Prior to joining Arabella, Bruce spent 13 years at The Nature Conservancy where he led the Illinois Program, the Upper Mississippi River Project, and the four-continent Great Rivers Partnership. In addition to Arabella, Bruce serves on the board of the Windward Fund—a 501(c)(3) fiscal sponsor and grantmaking intermediary—the Morrison Family Foundation, the Lilly School of Philanthropy, Rare, and the Lake County Community Foundation.



**Nancy Roob** is the CEO of Blue Meridian Partners and the President and CEO of The Edna McConnell Clark Foundation (EMCF). While at EMCF, Nancy played a major role in developing and implementing EMCF's grantmaking strategy. Prior to that, she developed EMCF's Program for New York Neighborhoods, which launched community-building and neighborhood-stabilization projects in the South Bronx and Central Harlem. One of the program's projects evolved into the Harlem Children's Zone, whose success inspired legislation to create "Promise Neighborhoods" throughout the nation. Before she joined the Foundation, Nancy worked for the Boston Persistent Poverty Project, the Fund for the Homeless, and the Child Care Resource and Referral Center in Boston.



**Nicholas (Nick) Tedesco** is President and CEO of the National Center for Family Philanthropy (NCFP). Prior to joining NCFP, Nick served as a senior advisor in the J.P. Morgan Philanthropy Centre helping clients meet their philanthropic goals. Previously, Nick was at the Bill & Melinda Gates Foundation, where he helped launch the Giving Pledge. Nick managed relationships with the Pledge's current and prospective members, as well as their staff and advisors. Nick began his career as the Deputy Director of the Children's Health Forum – a national nonprofit focused on preventing and eradicating childhood diseases disproportionately affecting underserved communities. He serves on the Regional Board for UNICEF USA and as a panelist for the Echoing Green Fellowship and MacArthur Foundation 100&Change Initiative.