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Rethinking Philanthropic Partnerships:

Wisdom from Nonprofit Leaders on Trust,
Collaboration, and Empowered Support

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Adam Ambrogi was a 2022-2023 Visiting Practitioner at the Center for Public and Nonprofit Leadership in his personal capacity with a 20+ year career working in the democracy, elections, and voting rights space. Adam has brought together stakeholders in the social sector, philanthropic community, and government to work at the intersection where strategic vision, policy creation, resource mobilization, and coalition-building meet. Adam previously worked in government, private sector, philanthropy and currently serves as the Chief of External Affairs at the League of Women Voters.

Introduction

The social sector is highly dependent on contributions from philanthropic institutions. This dynamic between nonprofit leaders and foundations can be both a productive and challenging partnership. It is becoming clearer that the voices of nonprofit leaders in the field need to drive more of the conversation around the direction of philanthropy and where this relationship can be improved. This piece is an effort to bring those social sector voices, stories, and ‘best/worst’ practices to life in a way that, I hope, provides guidance to foundation leaders and nonprofit leaders alike.

Much has been written about the relationship between funders and grantees, including key trends and recommendations around important issues like trust-based philanthropy¹ and participatory philanthropy². By simply intervening in a specific field, grantmakers’ preferences and incentives influence potential grantees; and there is always a risk that funders have a limited perspective of the communities they are trying to serve. Consequently, grantmakers should maintain regular communication and a sense of curiosity and humility with both grantees and other field leaders. Leaders of philanthropic organizations bear a great responsibility to evaluate their organization’s values and social impact, determine where their power limits their grantee’s work, and identify opportunities to push back against unproductive structures. Grantmakers should uphold a duty of care to both the ecosystem in which they operate and the nonprofits they opt to assist.

I interviewed four current and former nonprofit leaders in the democracy and civil rights ecosystem to explore how the dynamic between funder and grantee manifests. We talked about what worked, what didn’t work, and how future philanthropic interactions might be improved. Nonprofit leaders who are women and people of color face unique challenges in the current philanthropic sphere.³ Lifting up the voices of communities not equally represented in public discourse and social sector analysis was important in showing we could reimagine and craft the nonprofit relationship with philanthropy. Each interviewee had a unique story to tell about how they viewed relationships and dynamics between their organizations and the funders who supported them. There were also clear throughlines amongst the interviewees, which I share in this paper.

To gather insight from these nonprofit leaders, the following questions were posed:

- What were the expectations you had of philanthropy upon entering your role as executive director and how did those expectations measure up to reality?
- What were some of your uniquely positive experiences and practices from philanthropy that you experienced?
- When were there uniquely challenging or destructive tactics that hindered your work?

¹ "Trust-Based Philanthropy Project." Trust-Based Philanthropy. January 2020.

<https://www.trustbasedphilanthropy.org/>.

² Gibson, Cynthia M. "Participatory Grant Making: Has It's Time Come?" Ford Foundation. October 2017.

https://www.fordfoundation.org/media/3599/participatory_grantmaking-lmv7.pdf.

³ "Overcoming the Racial Bias in Philanthropic Funding" Stanford Social Innovation Review. May 4, 2020.

https://ssir.org/articles/entry/overcoming_the_racial_bias_in_philanthropic_funding

- If you were creating a foundation from scratch in your chosen field, how would you staff it? What would you want staff to know, and what values would you prompt them to follow?

To ensure the interviewees spoke freely and without regard to repercussions, attribution of specific quotes and perspectives have been granted anonymity. The names of any foundations or donors mentioned will also remain anonymous. Using insights and examples from these leaders, I put forward three broad recommendations for how funders can best aid the nonprofit sector to make each dollar most effective. These recommendations include reimagining nonprofit-foundation relationships, broadening opportunities for supporting nonprofits, and connecting foundation staff with the community in a deeper, more authentic way. By providing specific examples in each of these focus areas, this paper aims to imagine how both nonprofit and philanthropic stakeholders can enter into a new age of effective and powerful leadership.

Recommendation 1: Reimagine Nonprofit-Foundation Relationships

The relationship between nonprofits and foundations has historically been predicated on an unfortunate power imbalance, around money and influence, between the grantor and grantee.⁴ Grantors often temper the operations and programming of nonprofits, but nonprofits rarely have the opportunity to influence the structures or decisions in philanthropic organizations. However, by looking beyond traditional financial support, we can reimagine what mutual support could look like and acknowledge the value that both nonprofits and donors can provide to each other. By expanding our perspectives and conceptions around this dynamic, the relationship between actors could significantly change for the better.

Nonprofit Feedback – Nonprofit leaders suggest pushing back against one-way feedback systems that limit nonprofits' influence on the foundations they work with. Nonprofits have valuable insights about how foundations are staffed and structured and, if heard, could help improve the efficiency and efficacy of philanthropic dollars. However, this requires investment in meaningful relationships between the entities⁵ — a relationship between grantee and grantor that is more ‘level.’

One interviewee said, “Where there is a [constant,] trusting relationship, the grantee will be able to challenge their foundation, their liaison, a bit more... The nonprofit will feel more empowered to say, ‘You know I just don’t think that is the direction we want to go... That might not be best for the community.’” This speaks to the need for foundations to prioritize building meaningful relationships, which can be accomplished by giving larger grants to a fewer number of grantees and/or rethinking how staff invest their time.

This leader promoted developing “a relationship to respect each other professionally, [to] know when to listen, know when to act, and know where to support if asked. That is, for me, what foundation leaders could really benefit from. ‘So, you want to help?’ Okay then first learn how to listen and listen to where your partners need help.”

⁴ It would be meaningful in the relationships if the nonprofits were viewed as powerful because of the work they do in community, and their expertise inspiring and leading individuals in community to a better future.

⁵ Chandler, Jennifer. "The Secret Sauce of Great Funder/Nonprofit Relationships." National Council of Nonprofits. October 10, 2017. <https://www.councilofnonprofits.org/articles/secret-sauce-great-funder-nonprofit-relationships>.

It is also important for foundations to approach an organization directly to understand what direction it's heading in and how it characterizes its own work. Assumptions about an organization, its strategy, direction, and diversity, should be tested with direct conversation with an organization's leaders. At times, the highly competitive grantee environment can lead to groups disparaging other groups in the field to gain favor with a funder. Engaging in meaningful dialogue with the organization and relying on their self-described direction is a vital step to eliminate bias and rectify any misconceptions in the grantmaking process.

Funders Provide Access – Funders can play a special role in uplifting the voices of nonprofit leaders and ensuring they are heard. For example, one interviewee indicated the role of foundations and 'high net worth individuals' in helping clear the way for their organization. They recounted a personal experience in which they were invited to a national conference in their home city, but not provided with any speaking opportunities or the chance to get attention for their organization. A board member and grantor to the organization stepped in and engaged with the conference, which resulted in a path for the leader to speak. It is through these types of actions that funders can increase their impact and support for their grantees.

Non-Financial Support of Nonprofit Leaders – There were some philanthropic leaders mentioned in the interviews who supported nonprofit executive directors, even when there was no funding available. Their framework was, 'How else can I support you in your leadership?' There is value in having support, guidance, and coaching, even if there is never a funding relationship developed. Funders should be aware of the impact that a non-funding relationship has on executive directors in the field. Non-fundable projects that are important to the field can still be supported by leaders in philanthropy even if all they can give is time, not 'treasure.'

Another interviewee said, "People who have been willing to problem-solve with me, to gut check, troubleshoot and workshop, that has been invaluable." Even funders who cannot currently give financial or other resources have contacts and introductions they can make to others who can, as many funders interact through collaborative funding tables. Unconventional support can include providing access to relevant information, serving as an informal coach, acting as a strategic advisor, and encouraging foundation staff to embrace vulnerability. These practices contribute to a more dynamic and non-traditional framework for foundation leaders to bolster the capabilities of nonprofit leaders—and at times, provide meaningful support short of financial resources.

Power Differentials, Representation and Effort in the Funding Field – Most leaders referenced that women, people of color, and gender nonconforming leaders often do more work than others to receive funding. "We are asked to be on a panel, to show diversity, to add color or flavor, but then you don't back that up with dollars—or any kind of support. That for me is probably one of the biggest problems that I see." The power dynamic can also be a drain on a leader's time in service to strategy. Foundation strategy leads can invite nonprofit leaders to days-long strategy sessions, without promise (or result) of any funding. Some 'free' guidance for foundations may be acceptable in the name of strategy; requesting large amounts of a leader's time without hope of grant or financial support may be extractive in nature. This interviewee reflected that there have been great relationships with their program officers, "but they are not necessarily the people in power—and certainly not the ones sitting on their board, not the heads of the foundations. I've had many a program officer go to bat for us internally. But the way that most philanthropy is set up, they are not the decision-makers." There may not be clear ways of addressing the

power differential within foundation structures; there are surveys that the Center for Effective Philanthropy promotes might be one way to provide feedback without facing repercussions to an organization.⁶

Recommendation 2: Broaden Opportunities for Supporting Nonprofits

As we innovate new techniques for non-financial assistance, we must also reevaluate traditional methods of fiscal support. While programmatic grantmaking has generally defined the philanthropic-nonprofit dynamic, there is no better time to reimagine ways to make each financial contribution more effective, efficient, and receptive to the sector's needs.

Operating Grants – It is well understood that philanthropy [at least philanthropic best practices] has made *some* progress toward general operations support. Previously, there was not a clear understanding that the “back end”—operations, tech, HR, of nonprofits—needed to be supported, and that overhead costs were not sufficient to support organizational growth. However, there has been a greater trend toward acceptance of general operating grants.⁷ Infrastructure support, not just the exciting program work, is a crucial dimension in which the philanthropic community can support nonprofits and their leaders. One interviewee spoke about the importance of having greater trust from foundations in their area that led to more general operations funding: “[they] have given us general operating money like we haven’t seen before. We haven’t gotten a lot of money attached to crazy metrics.”

Higher Tolerance for Risk – Reevaluating the relationship between nonprofits and philanthropy might require reevaluating the tactics and approaches of philanthropy itself. One leader believed ‘business acumen’ was one quality they would want to prioritize in foundation staff. They reflected that most executive directors were business leaders themselves in managing nonprofits, and having thought partners that understood the pressures, financial management, and strengths and opportunities of organizational choice would be beneficial. The best foundation partners are respectful of the grantee’s expertise, and they bring something to the table themselves. Part of this reimagined relationship includes foundation staff with a higher tolerance for risk—understanding and mitigating those risks but wanting partners that are more willing to be aggressive with strategies and tactics. One leader referenced that aspects of philanthropy could be improved with a ‘venture capital’ style approach⁸ for the social sector to ensure that some experimentation on programs and higher tolerance for risk could be explored. This approach is similar to impact investment⁹ and works to create positive social change, using borrowed concepts and techniques from traditional finance models, but sees philanthropic assets as investments. While the social sector is dynamically different from the financial sector, several leaders wanted greater risk-taking from foundations and greater trust in the skills of the nonprofit leaders.

⁶ See: <https://cep.org/assessments/>

⁷ Chandler, Jennifer. "New Attitudes, Old Practices." The Center for Effective Philanthropy. October 10, 2017. http://cep.org/wp-content/uploads/2020/11/Ford_MYGOS_FNL.pdf.

⁸ Bildner, Reed, and Voss. How Venture Philanthropy Works and Its Role in Effective Charity." Stanford Social Innovation Review. 2020.

https://ssir.org/podcasts/entry/how_venture_philanthropy_works_and_its_role_in_effective_charity.

⁹ "Impact Investments." Harvard Business School. <https://www.hbs.edu/impact-investments/Pages/default.aspx>.

Recommendation 3: Deepen Foundation Relationships with the Community Served

As the philanthropic sector looks to deepen its impact, nonprofit leaders urge foundations to search for novel ways to engage directly with the communities they serve. Interviewees were concerned when they felt that the foundations did not have the expertise they did—either in the field where they practiced or in the geographic region where they worked. Several leaders called for foundations to stand with nonprofits in this moment of crisis and help surge dollars.

Consultants and Researchers – Some interviewees recounted challenges with foundations’ over-reliance on “ivory tower” solutions. Leaders expressed concern over how experts from consulting firms, think tanks, or universities offer strategies for nonprofits working with foundations. These same consultants are disconnected (or at times far-removed) from the lived experiences of the communities that the nonprofits serve. Interviewees cited the importance of having comprehensive data and research, but also building relationships with consultants and researchers who are invested in diversity, equity and inclusion work and have firsthand knowledge of the affected populations. When this is done, nonprofits and foundations alike achieve better, more effective strategies.

Diversity of Foundation Staff – Regarding foundations’ staffing, nonprofit leaders suggest hiring people from the fields that the grantmaking is directed towards. Many of them would aim to have staff from the grassroots level, experts, organizers, or leaders who have served communities of color or other disenfranchised communities. One leader suggested that they wouldn’t hire someone who had just worked on the issues, but also someone directly affected by the challenges that the grantmaker was trying to address. They wanted to find more program officers from diverse communities and backgrounds, including women, young people, and people in the LGBTQIA+ community.

Foundation Resources and Understanding the Moment – Leaders also noted that resources have not surged after the intense pressure of the 2020 election, despite current threats to rights and democracy space. “We were in a crisis [in 2020] and money just seemed to move. We are still in a crisis—if anything, it has worsened— but money has stopped. What has changed in the last few years? Nothing has changed except I can’t raise money right now. I cannot close my gaps.” There are ways that foundations can surge giving during a year when democracy is under threat. One idea that some philanthropists have promoted is to increase the payout of 5% to 6% or 7% during moments of crisis.¹⁰ Ellen Dorsey has bravely pushed this issue as executive director of the Wallace Global Fund, encouraging others to increase their payouts, and utilizing 20% of its endowment in 2020.¹¹ Another, more drastic, solution is for foundations to sunset their grantmaking, which can help philanthropists focus on making impact during a fixed period of time.¹²

¹⁰ The 5 Percent Foundation Requirement May be a Floor, but the Ceiling is Awfully Low.” Inequality.org. July 20, 2023. <https://inequality.org/great-divide/foundation-payout/>

¹¹ “Interview with Philanthropy News Digest and Ellen Dorsey, Executive Director, Wallace Global Fund” Philanthropy News Digest. May 14, 2020. <https://philanthropynewsdigest.org/features/newsmakers/ellen-dorsey-executive-director-wallace-global-fund>

¹² “Philanthropists Discover the Value of Sunsetting” The Wall Street Journal. April 3, 2023. <https://www.wsj.com/articles/philanthropists-discover-the-value-of-sunsetting-aeb456ce>

Remote Work – Foundation staff must also be given the necessary support to physically live in and be connected to the community they serve. One leader mentioned how foundations might provide financial assistance to communities in need through funding but did not allow remote work for their foundation’s employees. In this case, the leader was a finalist for a foundation role supporting grants in their city; but the foundation would’ve required a move to ‘headquarters.’ This meant staff members were forced to relocate and leave the communities they worked in, creating a physical barrier between grantmakers and grantees. “Where it matters most is in program-based work. Whether foundations want to admit it or not, the way they set up their office influences their strategy and the nature of the work that nonprofits do. So as much as foundations don’t want to shape what nonprofits are doing, nonprofits are going to align their program work to where the funding is.” If the gap between foundations and nonprofits is to be bridged, staff members in both sectors must cultivate deep roots in the places they work. In a post-Covid environment, this remote work model might prove to be the answer and a place for genuine investment.

Conclusion

These stories representing lived experience from the nonprofit leaders I talked to caused me to more deeply understand and rethink how foundations support leaders in the field. It also may give hints for nonprofit leaders on how to improve their relationship with funders, or succeed despite the funder dynamics. It underscores key aspects of foundation interactions with present and past leaders. The provided perspectives and suggestions are intended to benefit foundation leaders across their professional journeys and nonprofit executives aiming to foster, construct, and sustain impactful relationships with funders. It is my hope that the recommendations presented prompt conversations with the field, fostering an envisioning of a more effective and transformative relationship between grantmakers and grantees.

Gratitude and Interviewee Bios

The author would like to thank Dr. Kathy Kretman and Dr. Luisa Boyarski at the [Center for Public and Nonprofit Leadership](#), without their support, this project would not have occurred.

The author would also like to thank the following nonprofit leaders for their willingness to volunteer their time, to share their journey, be authentic and frank, and aid this paper in support of the author's Visiting Practitioner position at the McCourt School of Public Policy's Center for Public and Nonprofit Leadership at Georgetown University. If you're in a foundation and are looking to support dynamic social sector leaders, you might do well starting with them, and treating them and their organizations with the attention and funding they deserve.

[Chris Melody Fields Figueredo](#), Executive Director of Ballot Initiative Strategy Center (BISC)

Chris has led BISC as Executive Director since June 2018, bringing nearly two decades of experience in advocacy, creating collaborative spaces, and movement building. At BISC she leads the organization's vision, strategic planning, and fundraising efforts. As a queer woman of color who came to the United States at an early age with her working-class parents, she leads from her lived experience and desire to build an equitable and just world.

She came to BISC because she has witnessed the power of ballot measures to create radical transformational change and shift the narrative on issues like LGBTQ rights, creating a living wage, and the right to vote.

Over her career she developed messaging and communications strategies at ReThink Media, led programs to expand and protect the right to vote at the Lawyers' Committee for Civil Rights Under Law, worked on campaigns to end money in politics at Common Cause, and fought for DC's children and families to have access to a quality education at DC ParentSmart.

Chris is Venezuelan-American, raised in Texas where she received her degree at Austin College in Texas. She lives in Washington, D.C. with her amazing daughter. She is known to burst into song and loves whipping up delicious treats in the kitchen. Follow her on Twitter at [@Fieldsy](#).

[Mimi Marziani](#), former Executive Director of the Texas Civil Rights Project

Mimi Marziani has more than fifteen years of experience in constitutional law and civil rights advocacy, and is a nationally recognized expert in voting rights and Texas politics. She is commonly featured in the press, and has appeared in the *Texas Tribune*, *Houston Chronicle*, *Dallas Morning News*, *Austin American-Statesman*, *Washington Post*, *Guardian*, NPR, CNN, and ABC News in recent years alone. She is a frequent speaker in a variety of public forums, and has testified before the U.S. Congress and other governmental bodies on numerous occasions. In 2020, she was recognized with an "Austin Under 40" award.

In 2023, Ms. Marziani co-founded Marziani, Stevens & Gonzalez PLLC, a boutique law firm providing battle-tested legal counsel to politically active nonprofits, candidates, election officials and similar clients, focused on legal needs arising under Texas and federal law. For a decade, she has been a trusted lawyer and strategist for progressive candidates and campaigns in Texas, including running the first coordinated, statewide voter protection program for Texas Democrats in 2014.

For years, Ms. Marziani has taught constitutional law and mentored young lawyers. Today, she serves as an adjunct professor at the University of Texas School of Law, an instructor at NYU Abu Dhabi (January

2023), and on the NYU School of Law Board of Trustees. She also proudly chairs the board of Way to Rise, a national hub for donors working toward a multiracial democracy; serves as a Senior Policy Advisor for Allied, a firm investing in a more inclusive and responsive American democracy through its donor network; and is Senior Policy Counsel for democracySENTRY, a unique national project laser focused on achieving federal democracy reform at the first politically viable opportunity. From 2016 to 2023, Ms. Marziani was the President of the Texas Civil Rights Project, a position she assumed in early 2016 at the age of 33. Under her leadership, TCRP tripled its budget and transformed into a national model for community lawyering, providing excellent legal representation to traditionally marginalized Texas communities and forcing the State of Texas to be accountable to the rule of law. Ms. Marziani has also worked as Counsel for the Democracy Program of the Brennan Center for Justice, and as a litigation associate of Sullivan & Cromwell LLP.

Ms. Marziani graduated *cum laude* from NYU School of Law, and clerked for the honorable James C. Francis, a U.S. magistrate judge for the Southern District of New York. She received a B.A., *magna cum laude*, from Vanderbilt University.

Astrid M. Ochoa, former Executive Director of the Future of California Elections (FOCE)

Astrid M. Ochoa is an experienced professional in public affairs, democracy work, and network building. She has spent over twenty years working on transformative social impact for underserved communities. Currently, Astrid works for the County of Los Angeles and is founder of Ochoa Consulting Partners, a firm developed to support nonprofit organizations in the democracy space.

Astrid is former executive director of Future of California Elections and previous director of State Election Policy and Redistricting at NALEO Educational Fund. Astrid served as founding co-chair of the California Language Accessibility Advisory Committee, as member of the California Secretary of State's Voter's Choice Act Taskforce, and as a member of the California Secretary of State's November 2020 Taskforce. Currently Astrid serves on the national advisory committee for the Center for Inclusive Democracy at the Sol Price School of Public Policy at the University of Southern California.

Astrid holds a bachelor's degree in international relations from Pomona College and master's degrees in public affairs and urban and regional planning from the Princeton School of Public and International Affairs at Princeton University.

Stevie Valles, CEO of Chicago Votes

Stevie Valles is the CEO of Chicago Votes, a nonpartisan group of young people that runs civic education, voting, leadership development, and advocacy programs to shift the culture of participation and impact. Stevie has lived all over the United States, but his most formative years were spent in Ohio between Cincinnati, Columbus, and Elyria. He has a Social Work degree from Oakwood University, a Seventh Day Adventist HBCU in Huntsville, Alabama.

He has professional experience in electoral and issue based campaigning on the local, state, and federal level. And he has worked in the Texas Legislature as well as in the United States Senate. At Chicago Votes he bottom lines fundraising, strategic planning, and policy, and advises in every other function at the organization.

Stevie moved to Chicago in 2015, while working remotely for the Bus Federation (now, the Alliance for Youth Organizing and Action) as the National Campaigns Director. Since living in Chicago, he has been a member of several local and national leadership committees and professional boards, including: Governor J.B. Pritzker's Transition Committee, The Chicago 200 Steering Committee, The City of

Chicago Civic Engagement Advisory Council, The Change Illinois Board of Directors, and The Circle for Justice Innovations. He is an active member of the Illinois Prison Project Board of Directors, and the Alliance for Justice Safety's Board of Directors. In his personal time, he is developing a research project called No Borders that is measuring the impact different institutions around the world have on marginalized people living within those institutions. He participates in a meditation group at the Chicago Votes office, reads, writes, works, and trains at his local dojo.