



NATIONAL CENTER FOR  
FAMILY PHILANTHROPY

# *PASSAGES Issue Brief*

EXPLORING KEY ISSUES IN FAMILY GIVING

## BRIDGING THE POWER DIVIDE: How Family Funders Share and Shift Power

2019

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As a family funder, how can you acknowledge and responsibly navigate the power of your position? How does the power and privilege you hold affect those you interact with and support? How can you use your power for good—to make lasting impact?

This *Passages Issue Brief* features stories, perspectives, and practical tips on power, and suggestions for how family funders can work toward bridging the power divide with grantee partners and the communities they care about.

Start by sharing one or two of these stories with your board, and use the Board Conversation Starters to prompt an important dialogue with the board and staff.

# Introduction

It goes without saying: with money, comes power. Those who are born into, or work in, family philanthropy inherently have and hold a certain amount of power, whether they are conscious of it or not.

We can define power, for the purposes of this paper, as the capacity or ability to control or influence others. There's a power divide between those who *have* money and those who need it; those who have historically been able to accumulate and preserve wealth, and those who didn't have similar opportunities to do so; those who have the name, reputation, and influence to effect change, and those who do not.

In traditional grantmaking structures, the divide is quite clear: grantees must do the asking, reporting, and proving, while funders do the vetting, deciding, and judging.

Funders decide what they are interested in, and which organizations, causes, or communities are within their networks or line of sight. At the end of the day, they say yes. Or they say no.

As one family funder says, “We have power because we have the money. We can try to equalize our own power and be in real partnerships, yet we still have the power to say no. And that creates the divide.”

**Power in itself isn't inherently bad. It's how you use it that matters.**

Within their position of power, family foundations and donors have a rare and important opportunity to address the imbalances as best they can—and to lift up the voices, longings, and leadership of people and communities who historically have lacked power.

A growing number of family funders are proactively working to bridge the power divide, and they are doing so in several inspiring—and strategic—ways. Those who are honest about the power divide, and who actively work to change it, say it makes them better grantmakers. In this way, bridging the power divide is about foundation effectiveness. Field experts and colleagues agree: family foundations cannot be effective if they are in an ivory tower. To do their best work, they must connect to communities in a real and authentic way.



As a family funder, you can own your power and privilege, and harness it for good—creating impact and changing norms with and alongside your community and partners, and opening space for others to recognize, assert, and reinforce their power. By taking steps to do so, you lead the way for your family foundation colleagues to do the same.



**This *Passages* features a wide variety of perspectives and practical tips** from family foundation colleagues who are sharing and shifting power with their grantee partners. In it, you will find stories that will help you and your board:

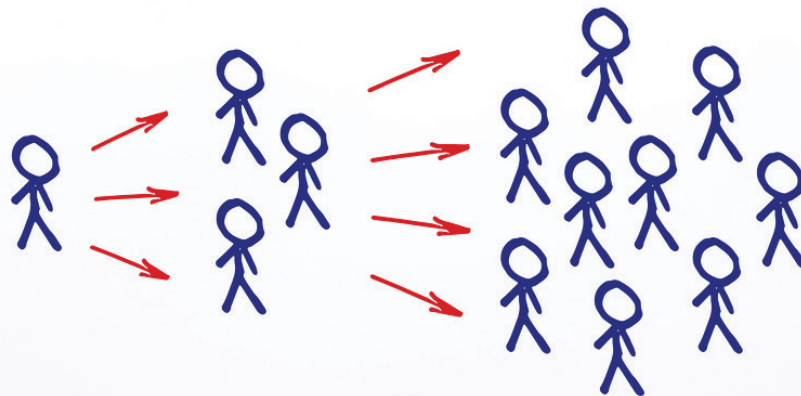
- *Examine power in your family history and wealth, and your foundation's internal structures, processes, grantmaking, and external communications*
- *Consider how you show up in your role as a funder, and how you can responsibly and respectfully navigate your roles and relationships*
- *Make intentional choices about leveraging power, reputation, and resources*

**It should be said:** Power and money are some of the hardest things to talk about, in our families and board rooms, in our communities, and as a field. There are roots to this power divide that stem from a long history of racial and economic injustices. These are critical and timely conversations to have, and this *Passages* guide will touch on these topics. It will also guide you to go deeper by pointing to other more comprehensive resources on race, equity, and inclusion.

As foundations and as individuals, every single one of us has a comfort edge when it comes to talking about our own power and privilege, our biases, and the potentially harmful history of our ancestors. Within your family foundation, you may be in a different place personally than your brother, aunt, grandmother, board chair, or executive director. It's okay to be in different places. We learn and grow together.

This *Passages* is designed to meet you where you are, and also to share ideas and sentiments that may critique or challenge your current thinking or approach. It is not meant to confront or judge, nor is it meant to assert that there is one quick-fire way to unwind or undo power systems that have been in place for centuries.

We hope you take in these stories with an open mind and heart—and that you share this *Passages* with your board members and colleagues (even if the idea of it makes you a little nervous). Perhaps it will prompt new ways of seeing power and privilege, and open up conversations that are long overdue. We can each challenge ourselves to *do something* to bridge the divides within our own relationships and communities, and look at how we're supporting—or unknowingly undermining—an equitable approach.



Power: the  
capacity or ability  
to direct or  
influence others.

# Name, Claim, and Share Power: Perrin Family Foundation

The Perrin Family Foundation staff has a built-in reflex when it comes to unpacking the power dynamics in any room or space, says Laura McCargar, president. “We have an institutional commitment to exploring how we hold power. As a staff, we work to move this learning inward, in our own personal self-reflection, upward to our board, as well as outward to our philanthropy colleagues.”

You can’t fully neutralize or eradicate power dynamics in grantee-grantor relationships, McCargar says. “We don’t want to advance the power equivalent of the problematic ‘color-blind’ trope. Just like we cannot be blind to the legacy of white supremacy, we cannot wish away power differentials because it generates discomfort. It is important to own and name the power a foundation carries for what it is, and also genuinely see, respect, and trust the power of the people who are working on the ground. Build a table where community folks

can show up unapologetic about their own worth and power.”

For family funders, she asks this: “How can you hold the reality of the power you have—the reputational power, the resource power—to fund the work and influence the field in a way that is responsive and accountable to the communities you work in and with?” When in meetings with grantees or community members, here are a few ways McCargar names and navigates power:

- **Name the dynamics.** “I recognize that I come as a representative of a family foundation, and there is inherent power in that position.”
- **Ask them to self-define whether the funder should be present.** “If at any point you think it’s not appropriate for me to be in the room, please speak up, and I’ll step out.”

## SHARING RESOURCES AND WISDOM: LIZ THOMPSON

“I don’t come from a mindset of power and privilege,” says Elizabeth (Liz) Thompson, President of the Cleveland Avenue Foundation for Education (The CAFE), a foundation she started with her husband, Don Thompson. “I’m referred to as a philanthropist, yet my background doesn’t reflect many of the stereotypes often associated with philanthropy. Nonetheless, I feel a tremendous responsibility to leverage the position we DO have to positively impact the communities we represent.”

Thompson grew up in Chicago’s Cabrini Green housing development. “I certainly don’t come from an ‘ivory tower’; I didn’t grow up with wealth, in fact, far from it,” she says. “My husband and I have worked very hard and are now blessed to be the stewards of financial resources. This has catapulted us into an arena where I’m now at tables and in conversations that are critically important to the causes that matter most to us.”

While her access to resources may be the reason she is invited to various tables, she says it’s

not the only reason she remains there. “One of my superpowers is the ability to translate the experiences I had growing up in an environment with limited access to high-quality education, healthcare, and housing, into ideas and recommendations that influence and inform the practices of organizations and boards addressing those very issues. My husband and I have traveled a path that many haven’t, and we feel obligated to share the insights that have resulted from that journey with as many people as possible. We want to see a whole lot more people with a story like ours.”

What has helped Thompson most in her philanthropy is her relationships. “For those with potential blind spots in their mindset, and we ALL have them, the fastest road to understanding is to forge relationships with those whose life experiences are not your own,” says Liz. “You can’t help but change your perspective if you are spending time with people in the community that are rooted in the work.”

- **Model the behavior of stepping out when appropriate.** “It seems you all are having a layer of conversation that I shouldn’t be here for, so I’m going to step out.” (And then leave the room.)

McCargar notes this has also required recalibrating the foundation’s own expectations around power. “There have been moments when we’ve felt like we were taking up too much space in the room, but our partners have seen it otherwise. Our presence is an important part of demonstrating our commitment to relationship and accountability.”

### **Look at how you operationally perpetuate power.**

Location matters, says McCargar. “Our office used to be in Ridgefield, Connecticut—an affluent community where the family grew up. This wasn’t reflective of or accessible to the constituents we support. We then moved to a New Haven co-working space, sharing the same floor with some of our grantees, giving them real and immediate access to the foundation. They would sometimes pop into our office, plop down on the couch, and ask: ‘do you have a minute?’ It shifted our relationships with them.”

Today, the foundation resides in an independent office space located in a multi-use building, sharing the location, meeting room space, and convening areas with its grantees and other creative nonprofits.

### **Use your mission to move and share power.**

In 2012, the Perrin Family Foundation implemented a new mission focused on partnering with organizations in under-resourced communities across Connecticut to support youth as leaders of social change. They are now asking themselves: *what does it mean to move forward with this commitment?*

“The foundation has a commitment to funding youth-led social change: We don’t define our grantmaking by issue areas—our focus is youth organizing. This creates the room and space for community leaders and groups to define for themselves what the priority work is. Folks don’t have to contort themselves to get funding. It has supported the power of communities to define what their priorities are, and it has enabled a more powerful network—supporting power building on the ground,” says McCargar.

“It also means we have a dynamic group of organizations that work across geographies and

issue areas, with an intersectional lens. This creates room for communities to build power themselves, without having to compete over which issue is more important,” she says.

“Philanthropy gets to define so much of what’s important based on what they prioritize in terms of dollars. Because the Perrin Family Foundation funds the process rather than a particular issue, that helps minimize some of the inherent power dynamics, and supports power building,” says McCargar.

There is a flip side to this, though. “Sometimes when there have been opportunities to lean in and exercise our institutional voice, the board has said, ‘we don’t take stands on particular issues.’ It’s been a double-edged sword, but we can’t shirk our power when it feels risky.”



### **Learn alongside each other.**

There’s big benefit to board and staff coming together in conversation about power. “The process is a learning opportunity in itself, and every bit as valuable as any outcome that comes from it,” she says. “As a staff, we can hold education and learning spaces for the broader board in some ways that family members cannot,” she says.

She encourages more family foundation boards and staff to have these conversations.

“There is not a lot of room in family philanthropy for people to do a personal mapping of power they hold, and that their families have held for generations,” she says. “We need to have space to process the origins of privilege—and what that means to each of us, as individuals, as families, as foundations.” *See the Resources section for toolkits that help map power.*

# Explore the Origins of Family Wealth: Masto Foundation

The Masto Foundation is a family foundation rooted in a community of color. Sparks, executive director and granddaughter of the founder, says her family history and experience with institutional discrimination informs how the foundation approaches equitable giving.

“During World War II, like so many Japanese Americans, my grandparents were sent to an internment camp. My grandfather, Harry Masto, was a farmer, and to escape the camps, was sent to Idaho with other internees to set up a potato farm for the government,” she says. “After the war, he bought the land from the government, set up a potato processing plant in Eastern Washington, and invented a process to dehydrate potatoes. This is how his company became successful, and ultimately, how he had the money to start a foundation in [the] early ‘80s,” she says.

Shortly after Masto established the foundation, he suffered a stroke, which left him without the ability to speak. Sparks’ grandmother, Masie Masto, managed the foundation for the next 30 years but, largely due to a distrust of American legal and financial systems based on her experiences during the war, she didn’t invest or grow the foundation. In 2018, she passed away at age 101, and Sparks, who had been working with other foundations for 15 years to build her skills in philanthropy, became executive director.

To prepare for her role, Sparks traveled to eastern Washington to learn from the people who were recipients of her grandfather’s philanthropy. “I learned that my grandfather practiced community-based philanthropy well before that was a thing, and tried to lead by example. He gave to those who experienced wide-range discrimination and provided his time, leadership, and money to the community.

## HONESTY IS THE BEST POLICY

Foundations with long histories often find that their past practices are at odds with their current aspirations. Such is the case for the Z. Smith Reynolds Foundation of North Carolina. But David Neal, trustee of the foundation, says that families that are honest and transparent about their past can still play a leading role in sharing power and advancing racial equity.

“I think a lot about how my family’s history is helping to inform what I have at stake and my own feeling of responsibility for the continuing legacy of white supremacy,” he says.

“As a foundation, we did a deeper dive about a year ago to reflect on where we’ve been and where we’re going with our racial equity work, and I talked about this juxtaposition of our past work and how this work is sometimes uneven and doesn’t always follow a straight line.”

One thing foundations and families can do is model truth telling in their own histories and acknowledge that this is where we came from, he says. “You can say that ‘we didn’t always take this seriously’ or ‘we used to be on the wrong side of this issue, and this is what we’ve learned.’ You can then move forward and say this is where we want to go—that we want to reflect the idea that everybody should have a full and fair chance at life.”

It’s okay to model that kind of vulnerability and truth telling, he says, and that’s a valuable role that foundations can play. “There’s too little of that in our society. We as a foundation don’t pretend to have the answers to these thorny questions. Different foundations will come at this work from very different places, and that is okay.”

*Excerpted from: Even With Complex Family Histories, Families Have an Opportunity to Advance Equity, Family Giving News*



His approach was to bring people in, to give them opportunities to invest in each other, and leverage that engagement to lift up the entire community,” she says.

Sparks reflects on the many variables that allowed her family to accumulate wealth, when most Japanese Americans had resources taken from them before and during the war. “There’s a huge bias in terms of wealth accumulation in America that privileges white families and white communities. In addition to communities of color having wealth taken from them and not receiving equal compensation for their labor, a long history of structural racism in America has created and perpetuates barriers to accessing legal and financial systems. There are also cultural differences that discourage wealthy families in communities of color from stamping their name on a foundation, much less a building.”



As a self-identified queer person, Sparks reflects on the many challenges that members of the LGBTQ community face in terms of accumulating wealth, and how that impacts the support they receive from philanthropy. She cites data from Funders for LGBTQ Issues: “For every \$100 dollars that is granted out in philanthropy, less than 27 cents goes to the LGBTQ community. LGBTQ families weren’t protected or offered the benefits of multi-generational inheritance until marriage became legal just a few years ago. LGBTQ families haven’t set up foundations, and philanthropy hasn’t taken proactive steps to be more inclusive, so the needs of the LGBTQ community are not in line of sight for most family foundations,” she says.

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<sup>1</sup> Source: *Funders for LGBTQ Tracking Report*

<sup>2</sup> Excerpted from: *Even With Complex Family Histories, Families Have an Opportunity to Advance Equity*, *Family Giving News*

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– David Neal, Z. Smith Reynolds Foundation<sup>2</sup>

“How can you challenge yourself and your family foundation to do things differently?”

– A. Sparks, Masto Foundation

“If philanthropy was built in a system filled with racism, and the current practices and policies in philanthropy are set up to exist in perpetuity—with no incentive for foundations to recognize and address the racial wealth gap or promote equity—it caused me to wonder: does philanthropy have the potential to perpetuate structural racism?” she says.

As one way of addressing this, Sparks founded several giving circles focused on promoting the inclusion of young people, LGBTQ communities, and people of color in philanthropy. She’s now bringing this inclusive approach to her own foundation.

“The lack of racial and cultural diversity in family foundations has led to a lack of variation in how grantmaking is done,” she says. “I’ve learned about philanthropy from an outsiders’ perspective as a queer woman of color. Our family foundation board—my mom, my sister, and I—now have the opportunity to think about how we can do things differently,” she says. “We’re now asking ourselves: How has this limited how philanthropy supports diverse communities? And how can we do our grantmaking to make it more equitable?”



To other family foundations, she offers this advice:

**Explore how your family accumulated its wealth.**

“The majority of wealth in this country was built on the backs of poor people and people of color. It’s easy to lose sight of that. We in family philanthropy can’t change the amount of wealth we have, or how it came into our families, but it’s our obligation to explore how it did come in, and how our families have benefitted from taxation and legal systems that already favor those who are privileged,” she says.

“Do a real assessment. Look at the dirty realities—the privileges of our ancestors, how the environment was impacted, and the ways you might go on autopilot today in perpetuating an inequitable system.”

“We in philanthropy have created a system where we can take on risk, at the cost of many who haven’t been able to take risks. It’s up to us to actively do something to question the systems we are a part of,” she says. “How can you challenge yourself and your family foundation to do things differently?”



# Unleash Community Leadership: Evelyn and Walter Haas, Jr. Fund

Cathy Cha, president of the Evelyn and Walter Haas, Jr. Fund, knows what it is like to grow up on the margins of society. Her grandfather was a rice farmer in Korea, and her father grew up on the farm, and then left Korea to attend graduate school in the US.

When Cha came into philanthropy, she moved to Boston to work at the Hyams Foundation. Her job gave her the opportunity to be at community meetings with Somali and Cambodian refugees, and to talk with young African American leaders. That was Cha's early education in what good philanthropy is all about: philanthropy that is healthy, respectful, connected, and community-grounded.

Back in the San Francisco Bay Area, she worked in several roles at the Haas Jr. Fund, and became president in 2019. Through its immigrant rights program and others, the fund works to lift up the voices of those who don't have power and privilege.

"One thing that's special about the Haas, Jr. Fund is that we take on big bold issues early. The fund was talking about gay marriage 19 years ago, and has been working to help undocumented immigrants come out of the shadows so they can claim themselves as rightful residents of California and this country," she says.

The Haas, Jr. Fund was one of the first funders of the Dreamer movement. "We take a simple but powerful approach. We help communities tell their own stories, organize, and have agency—and when their leadership is unleashed, it's nearly unstoppable. That's the story of the Dreamer movement, and that has been key to our LGBTQ work as well. When communities use their voice and find their power, they start advocating for themselves."

"As a funder, we figure out how we can be a supporting cast in their journey, winning their goals. When we work in partnership like that, it's the most powerful role philanthropy can play," she says.

The Dreamer movement is a good example of that. "We were seeing undocumented students start to organize on their campuses at UCLA and UC Berkeley. They were voicing their distinct needs as students, and asking school administrations to

"We help communities tell their stories, organize, and have agency—and when their leadership is unleashed, it's nearly unstoppable."

– Cathy Cha, Evelyn and Walter Haas, Jr. Fund

“To change perspectives—you must show up in the communities you want to serve. When you show up with your existing outlook, at least you are there. If you don’t show up, you don’t have a chance.”

— Liz Thompson,  
The Cleveland Avenue  
Foundation for Education

support them. Behind the scenes, we hired an advocate with an immigration law background. He interviewed Dreamers around the state, and asked them ‘what could we do to help you do more of what you’re already doing?’”

At first, all they wanted was to get together with Dreamers from other campuses to talk about their issues. “The Haas, Jr. Fund made a \$5,000 grant that first year to pay for motel money, bus tickets, and bagels,” Cha says. Over the next few years, the Fund joined with other funders in supporting the nascent movement to keep building its power and voice.

“Now they are a national movement, and are at the negotiating table on the urgent issues in the news every day,” she says.

“When funders are ready to listen to their grantees and follow their lead, amazing things happen,” says Cha. In her work, Cha finds ways to follow the lead of nonprofit leaders in order to better address their needs.

## WHO DO YOU HIRE?

It used to be that foundations would hire professors and PhDs and deans as foundation presidents. “Now, foundations are hiring nonprofit executive directors—people with lived experience, who have lived and made change. That has been a healthy shift,” says Cathy Cha of the Evelyn and Walter Haas, Jr. Fund.

“Philanthropy benefits when we hire and promote people who remember what it is to be in need, who know what racism is.”

Laura McCargar from the Perrin Family Foundation agrees. “One of the things the Perrin Family Foundation institutionally has done, even before my time, was to hire folks who have experience on the ground. That has allowed those who are holding seats of power to call in a different perspective that they wouldn’t see from career philanthropy folks,” she says.

For example, three of Perrin’s current staff members came from nonprofit youth work, the foundation’s focus area. “We each understand and have witnessed the harm of how resources have historically been distributed, and about the scarcity of resources designed to build power among community folks and people of color,” says McCargar. “We see and acknowledge how institutional and structural racism are held in the context of philanthropy. We have a desire to move resources to build a more just society, and at the same time, to be change agents—disruptors—in the context of philanthropy and philanthropic norms.”

# Build Authentic Relationships: The Jay & Rose Phillips Family Foundation of Minnesota

The Jay & Rose Phillips Family Foundation of Minnesota realized that if it wanted to be accountable, it needed to be in real relationship with the community it serves.

“We are a place-based funder focused on North Minneapolis, which is in a lower income area with predominantly people of color,” says Joel Luedtke, program director. “We understood that, as a predominantly white staff and a board without roots in North Minneapolis, we needed to find ways to engage with community members.”

First, foundation staff assessed themselves individually and as an organization using a fee-based tool called the Intercultural Development Inventory assessment. “We needed to understand how we show up in the community when it comes to race, diversity, and equity. We asked ourselves: what are the biases and lenses we bring, how much space do we take up based on our level of privilege, and how can we authentically work in people of color communities?” says Patrick Troska, executive director.

Understanding this was an important first step. “It showed us who we are, what we need to do differently, and what types of behaviors we need to start to practice,” says Troska.

In 2016, over nine months, the foundation engaged with 125 community leaders in a series of carefully facilitated conversations, using a strategy called human-centered design. “We had conversations with anyone who would talk with us: community leaders, faith leaders, teachers, principals, students, business leaders, and more. We asked them: what are your hopes, your dreams for your community? What do you most want for this community?” says Troska.

This wasn’t always easy or comfortable. Troska remembers a moment at a community meeting when an angry leader shouted at foundation staff. “Who are you to be in our community?” she said. We just had to sit there and listen. And we came back the next week, and the next week, and listened more. We could have gotten defensive or run away. But we stayed and practiced a set of skills and actions that helped us show up differently.”

Engaging a skilled facilitator made a big difference, says Luedtke. “Not only did the facilitator turn out to be a rich source of information, but

“Go where you are least comfortable. If you are uncomfortable, you are probably in the right place.”

– Patrick Troska, *The Jay & Rose Phillips Family Foundation of Minnesota*



the process introduced us to many community leaders that we didn't know before: people who were not necessarily positionally known or powerful, but who were passionate and had energy and leadership at the ground level," says Luedtke.

Once conversations were complete, the foundation applied these insights into a request for proposal process, reflecting what the community had said they wanted. Staff also formed community advisory teams, inviting community members they met through the design process to help review the proposals that came in. "Since 2016, we've continued to use community advisory processes to make our grants," says Luedtke.

"We now have a strong set of allies—folks who want to back the work we're doing. A new set of leaders emerged from those conversations we had early on. We're now seen as a trusted partner in the community, and the end result is way better grantmaking," says Troska.

Here's what the foundation has learned works well when working to build authentic relationships.

### **Listen deeply.**

It requires deep listening for this process to work, Luedtke says. "It's tempting to hear things and then reinterpret them in ways that are convenient later on. We took time to really listen, and gave careful attention to what the community members were really saying.

"It also takes work to build strong relationships between trustees, so when somebody is off pitch, somebody else is willing to have a conversation with them to try to get things back on track," says Luedtke.

### **Bring the board along.**

The board must be *on board* for this work. "It was important for us to bring the board along," says Luedtke. "Staff really led this work or, let's say, mediated this work between the community and the trustees, who are all family members. We learned how valuable it was for trustees and our community advisors to get together, and get to know and appreciate each other."

### **Stay grounded in place.**

"We spend time in the key place, with the communities we care about and are trying to learn from. Our staff, in particular, are on the ground," says Luedtke. "We do site visits with our community advisors and bring our grantee partners into meetings to hear from them and their perspectives about the work."

"We try to build our understanding, our knowledge, through on-the-ground conversations, by sharing materials, and holding educational calls with community advisors. The most important thing we do is get folks on the ground to learn from our local partners. Our community advisors are a key part of helping that happen."

## **IS LISTENING ENOUGH?**

The importance of listening to grantees and the community cannot be overstated. Yet, listening, without acting on what you learn, can backfire, say field experts.

"Funders do a lot of gathering input from grantees, and there's value in that. But it's not enough," says Lori Bartzak, Senior Director of Knowledge and Content at Community Wealth Partners. "Some foundations think 'okay, we've done our job' simply because they've listened to communities, and it doesn't matter what they do with that information. Yet that can harm relationships and contribute to a lack of trust."

Jen Bokoff, Director of Stakeholder Engagement at Candid., agrees. "I'm tired of funders patting themselves on the back for the most basic things, like listening. Your listening only reinforces your power. Constituents say: what's the point of a foundation listening if resources don't get redirected my way? Or if they think they heard me but they didn't? You may have meaningful strategy, but you still get to decide what you do with it. If you really want to shift power, shift decision-making power."

**"If you really want to shift power, shift decision-making power."**

—Jen Bokoff, Candid.

# Treat Grantees as You Would Like to Be Treated: Ball Brothers Foundation

Jenna Wachtmann remembers the first time she visited a foundation. “It was a fancy office building, and I was there to lay out a case for support. I was nervous. It was a different world from where I came from. The nonprofit I worked with was filled with donated office furniture from the corporation down the street. That is a power dynamic.”

Before her program officer role at the Ball Brothers Foundation in Indiana, Wachtmann was a grant writer and fundraiser for a number of nonprofits. “I spent eight years writing grants, building a fundraising program, and teaching job training programs. I wore multiple hats, and down into the depths of my soul, I remember how it is for nonprofit staff: they manage the day-to-day operations, pick up the kids from afterschool programs, and then meet with donors. It provides perspective for me now, when I’m sitting behind a desk with a stack of proposals. It’s important to remember the complexities of the work that has gone into each and every one of them.”

“As a foundation staff member, we can get too used to the world in which we sit. It’s hard to remember and be in those shoes,” she says.

“At our staff meetings, we often say ‘we really don’t know what it’s like,’ meaning we have only a broad view of what’s going on. We can connect with people who are working on these projects, yet we will never fully know what it’s like to be on the ground, living the experiences of those we want to serve. It’s important for us to acknowledge that.”

A few years back, Wachtmann went on a bus pick-up program for low-income families who faced significant barriers to getting childcare for their kids. “I rode along as this bus picked up kids from their homes. I saw parts of our community I hadn’t seen before, and the exchange of trust between the childcare provider and the parent. To see that as a funder, and to meet the kids benefiting from this program, gave me a different perspective. When you look at something from a 10,000-foot view, it can look simple. Up close, you see the complexities.”

Here are some ideas Wachtmann shares from the Ball Brothers Foundation:

## **Meet grantees where they are.**

Wachtmann says it’s important to meet grantees anywhere else than the foundation offices. “They shouldn’t have to come to our conference room and sit around our big table,” she says. “I meet them at their own place of work, or at a downtown coffee shop—places where people feel comfortable. I try to make it convenient for them. This isn’t always feasible or appropriate, but it can help reduce some ‘foundation formality’ and promote genuine grantee/grantor dialogue.”



## **Keep an open-door policy.**

The foundation knows it has done something right when grantees can tell them something isn’t going well. “Some of our best relationships have developed over challenges and problems in implementing a program or project. We view ourselves as much as we can as thought partners, yet we never tell our grantees what to do—because honestly, we don’t know what’s best for their organization. Yet we want to walk alongside them. If they have a challenge, we want them to feel comfortable coming to us, and

we'll work to the best of our ability to connect them to resources and tools," she says.

### **Ask grantees for feedback—and act on it.**

Foundation work is lonely work—not a lot of people want to give foundations feedback, says Wachtmann. “Ideally, I like to invite grantees to lunch one-on-one, and casually ask them: ‘how do you feel about the foundation? Anything we can do better?’” she says. “We have a handful of grantees who will be pretty honest, and we value that.”



It's not helpful to ask grantees to do something, and then keep them in the dark. “One time, a grantee asked me: what do you do with our final reports? Do they just go into a black box?” says Wachtmann. “I realized we had never before taken the time to explain our process to them, and let them know that, in fact, there is a process that takes place.”

“We immediately changed our communications process. Now, when we receive a report, the program officer sends a personalized letter that acknowledges receiving the report, and explains the review process.”

“If foundations ask for feedback, and we get it, then we need to do something about it. This is a simple, practical way that we can lessen the power dynamic.”

### **Remember your role.**

“I once heard a retired foundation staff say: when you work for a family foundation, it's an honor and privilege. But it comes with great responsibility to the community that you are serving, the family whose name is on the foundation, and the people who will benefit from those philanthropic dollars. It impacts people's lives. Whether you are a board member or a staff member, you serve as a gatekeeper and an advocate. These are dual roles, and it's important to remember the complexity that lies behind those roles.”

“When it comes to bridging the power divide, we have a long way to go—we're not there, but we're looking to level the playing field anyway we can.”

– Jenna Wachtmann, Ball Brothers Foundation



# Transfer Decision Making and Wealth: Chorus Foundation

As a teenager, Farhad Ebrahimi's father gifted him a significant sum of money. His first reaction? Deep discomfort.

"It took me a long time to get my arms around how I wanted to respond," he says. "I had the sense that 'this money shouldn't be mine; it should be used for social change work.' I felt a responsibility that there was a moral, equitable thing to do."

Growing up in a family that talked a lot about politics and culture, power and power dynamics surfaced for him at a young age. "Both my parents were refugees: my dad from Iran and my mom from Cuba. I remember my parents yelling at the TV. It was a form of political education for me, and on the history of disastrous US foreign policy and interventions led to revolutions in both of these countries."

"Those early experiences influenced what the Chorus Foundation does now," he says. As its mission, the foundation focuses on 'supporting communities on the front lines of the old, extractive economy to build new bases of political, economic, and cultural power for systemic change.'

"People who live in a place should get to decide what happens in that place. That's true for Indigenous Peoples, for Black folks, for immigrants and refugees of color, and for working class folks. Too often, that ability for community self-determination is undermined," he says.

The entire sector of philanthropy is predicated on consolidated power and privilege, says Ebrahimi. "As funders, we are already showing up with a disproportionate amount of economic power. And here we are trying to build power in other ways, such as 'we've figured out the policy,' or 'we will only fund service providers that agree with the policies we believe in.' This causes groups to contort themselves. We need to be careful we're not trying to exchange our economic power for political or cultural power."

"Foundations, and all power structures, are extractive in many ways. We have to acknowledge that and be willing to dismantle that. And if we really want to try to make reparations for a history of oppression, racism, and other forms of injustices, that means facing a future where wealthy family foundations are less wealthy because the resources are shared more equitably," he says.

"Things get done,  
across relationships,  
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– Farhad Ebrahimi,  
Chorus Foundation

“The only way to truly dismantle power is to move the resources to the community.”

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Chorus Foundation

How does the Chorus Foundation recommend sharing resources more equitably?

### **Transfer decision making.**

“I hear lots of conversations in philanthropy about who sits on boards. Our approach is different. Rather than the board as the locus of our decision making, our board has a specific role: to push decision making to other formations outside the board. Instead of asking community members to sit on our board, we create processes and structures where folks can have a direct role in how resources go out in communities, and how connections are resourced.”

Additionally, the Chorus Foundation makes long-term general operating commitments, and lets grantees decide where they go. “We make eight to 10-year commitments to anchor organizations within our four focus geographies. Beyond those anchor organizations, we have democratized our process, asking our long-term grantees to help us design a grantmaking program that was accountable to folks on the ground.”

“In this way, the board embraces the overall strategy, but is not a decision maker,” he says. “This means trusting that community members are going to be doing the right thing, that they are the experts.”

“Relationships hold all this together. It means checking in with the folks we trust, and that know and trust us. Sometimes we design a structure and it’s imperfect, or we have a blind spot. Folks will let us know when there’s an ‘ouch,’ and we will change things accordingly,” he says. “Things get done, across relationships, at the speed of trust.”

### **Transfer wealth.**

The Chorus Foundation plans to transfer 100 percent of its wealth into communities. The foundation will sunset in 2024: “the climate crisis is simply too urgent for us to do otherwise,” says Ebrahimi.

Family foundation boards that make plans to exist in perpetuity are in direct opposition to sharing power, he says. “With perpetuity, you are interested in maintaining the status quo. The only way to truly dismantle power is to move the resources to the community.”

When the Chorus Foundation decided to spend down, the board saw it, again, in terms of relationships. “We looked at how much capacity we had to get to know people and build trust with them. That mattered more than how much money we had in the bank.”

“Foundations need to be honest with themselves: Is this family philanthropy about the family, or is it about the philanthropy?” he says. “If it’s truly about the *philanthropy*, it needs to be about shifting power and privilege in a way that benefits other people.”

# Get Rid of the Go-Between: Jacobs Family Foundation

The Jacobs Center for Neighborhood Innovation, part of the Jacobs Family Foundation, doesn't give grants. "My dad, Joseph 'Joe' Jacobs, felt strongly that charity is demeaning: it sets up a power situation, whereby the person giving has the power, the person receiving has no power," says Valerie Jacobs, board member of the Jacobs Family Foundation in San Diego, and principal of Valerie Jacobs Consulting.

"Instead of grants, we work in direct partnership with low-income neighborhood residents to improve their neighborhood." This takes a comprehensive approach, she says. "Funders often come in and do one thing—such as focus on jobs, or education. Yet, if you want to provide jobs, you also have to think about childcare, healthcare, training, and education. Communities don't work in silos. We can't either."

Taking a different approach to philanthropy, the foundation focuses on resident engagement and economic development, using its entire asset base and leveraging funds to build new housing, businesses, and retail stores in these neighborhoods. The foundation has purchased more than 60 acres of land, and with residents, created a community plan that supports long-term and meaningful community change.

The board knew in order to truly partner with communities, they would have to themselves become part of those communities. "We moved our foundation into an undeserved community, which made a big difference in our work. It allowed us to see the conditions that people live with every day and the multitude of issues that affect their lives. We couldn't do what we're doing from anywhere else."

To start its work, staff knocked on resident doors to hear directly from people what they wanted to change. "We didn't want to assume what they needed. We involved residents in the work and decisions from the very beginning, engaging residents to work with us, next to us—not us doing it 'to them.'"

Has it been easy, as outsiders coming in? Not in the least.

"It's been rough. We've been in the community for 25 years, and still, the trust is tenuous. Community members have good reason to doubt our intentions. To them, we look like another group of white developers, who—in the past—have come in, taken their money, and left. The community has been burned too many times."

It's a learning in progress, she says. "We try to be as open and transparent as possible. We attend community meetings to hear what their concerns are. Previously, we held meetings at our offices, and we realized people resented that. Now we go to where they are."

In 2025, the Jacobs Center for Neighborhood Innovation plans to sunset—turning over all its assets to community control. "We are transferring wealth to the community, all that we developed, making sure it is cash flowing, so that the community can use that money to be philanthropic in their own neighborhoods," says Jacobs.

To start the transfer process, the foundation has filled three seats on its board with community members, giving them equal authority as board members. "It's been a great learning experience for us as a board. They are our 'ears to the ground'—our conduits to the community. We include them in every decision we make."

"It's important to recognize what grants do in terms of maintaining the power dynamic. If possible, consider how you might directly work with the people you want to serve, without a nonprofit as the go-between," she says. "Give people direct access to your foundation so they can get to know you as people and not dollar signs. You can find out what's really important to them instead of deciding that for them."





# Go Beyond Equality:

## Edgar Villanueva

“I’ve personally experienced power dynamics from every angle,” says Edgar Villanueva, vice president of programs and advocacy at the Schott Foundation for Public Education. Villanueva serves as board chair of Native Americans in Philanthropy, as well as a board member of the Andrus Family Fund. He is the author of *Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance*.

“I came from a family and community that had very little power—little wealth, little influence, no voice or input into things happening around us—and yet, an inherent type of power in our heritage and who we were.” Villanueva is an enrolled member of the Lumbee tribe in southeastern North Carolina, the largest Native American tribe east of the Mississippi River. Today, he lives in Brooklyn, New York.

At age 28, he took on a leadership role at the Kate B. Reynolds Charitable Trust, and later, at the Marguerite Casey Foundation in Seattle. “Coming into philanthropy, all of a sudden I was overwhelmed with power. I went from being a very little person in the state of North Carolina to being quoted in the newspaper. Everything I said carried weight. I received invitations to all the cool events, and got more than 200 Christmas cards that first year—including one from the governor of North Carolina. I had joined the ranks of a place that held power and privilege that I wasn’t accustomed to, and early on, I saw that this could be dangerous and problematic. I needed to hold myself accountable—to put mechanisms in place to make sure my values didn’t shift, and that I stayed respectful in community.”

Villanueva attended social justice philanthropy trainings early in his career. “I was politicized about the power in philanthropy and how to use it. I saw others who didn’t come from power and wealth abuse their newfound power. People either use their power for good and are super conscious about it, or they don’t want to lose the power they’ve got. I didn’t want that to happen to me.”

“There is so much unchecked power within philanthropy. We talk about power more today, and yet there is still so little accountability. Philanthropy is a polite field—we’re all working under the assumption of doing good things and helping others. We try to move forward as a field and emphasize what’s good, but few want to call out what’s not working or when there is an incident. We need to figure out ways to hold each other accountable when people aren’t using power in appropriate ways.”

“At a basic level, it’s thinking about your site visits, and what you are asking of grantees. Are you asking them to travel and speak at your

“One of the most critical conversations we can have in philanthropy, especially the more we engage in DEI work, is how we operationalize our values around equity.”

– Edgar Villanueva,  
Philanthropy Executive  
and Author

meetings without much notice or pay? How fast you are returning their phone calls?” He recalls an example of a policy that required the foundation to return emails and phone calls within 24 hours or one business day. “That kind of customer service is a simple way to mitigate power.”

## BRINGING ON COMMUNITY BOARD MEMBERS

When it comes to bringing on community (non-family) board members, Edgar Villanueva says to remember to bring on at least three new board members at a time. “In any group setting, you need at least three community members for people to feel comfortable speaking up when there is a lot of power,” he says. “Community members coming on need to know they are entitled to all the same privileges of family members—they have the same voting rights and are full-fledged board members. They must be more than token folks coming on to nod or rubber stamp something.”

“Holding ourselves accountable as funders goes beyond bringing diverse faces onto the board and staff,” he says. “Beyond diversity and saying ‘we’ve identified these folks to be on our board,’ even if they are people of color, we need to ask them: do you have accountability and a relationship with the community? How are you accountable to the community you came from? How are you staying grounded?”

“A lot in philanthropy is all talk, and yet the conversation around power and privilege has gotten more real. I’m having conversations today with conservative funders that I couldn’t imagine three years ago. There is a reckoning in philanthropy, and this is a political moment. The way we’ve been doing things for a long time? We can no longer do them. We all can take a long look in the mirror and ask: what am I doing with everything in my power to drive change?” he says.

The root of this power conversation is race, says Villanueva. “More foundations are getting comfortable talking about race and white supremacy. In the past, it was okay to talk about race and diversity—but to say white supremacy was too harsh for the field. People are starting to embrace and understand it more in this space. You

can easily diversify your board and staff, but if you have systems and policies and beliefs that enforce that the white way of doing things is better or the only way, that’s still white supremacy.”

“One of the most critical conversations we can have in philanthropy, especially the more we engage in Diversity, Equity, and Inclusion (DEI) work, is how we operationalize these values around equity. Equity is not equality: it doesn’t mean everyone gets the same thing. It means we have to give more to the communities that are underfunded and marginalized,” he says. “It’s one thing to include people at the table or make grants to communities. To achieve equity, we have to go beyond equality.”

For those people who have been historically privileged, equity may feel like oppression, he says. “They may get less for a while so that others can catch up. That’s my big question: are people really willing to do that? Is family philanthropy willing to give up its power—power that is often tied to a strong identity, and legacy, and family name—so that others can experience it? That’s a hard one for people to accept.”

## *Diversity Trends in Family Philanthropy in 2020*

How many family foundations currently practice, or are planning for, diversity, equity, and inclusion practices in their work? According to NCFP’s *Trends 2020*, a study of more than 500 family foundations:

- **One-third** of family foundation boards include at least one person of color on the board, and one in ten have LGBTQ representation.
- **One-fourth** of family foundations currently use DEI goals and strategies as a part of their giving approach, with 16% engaging DEI experts.
- **One in three** have DEI initiatives in their future plans.
- **DEI considerations** are significantly more common in family foundations formed in the last 10 years (38%, as opposed to 15% for all foundations).

# Conclusion: Sharing and Shifting Power in Family Philanthropy—Board Conversation Starters

What does it mean for a family funder to share and shift power? Here are ideas and questions to help guide an internal discussion on how your policies and practices affect the power dynamics of your philanthropy, and what you can do to alleviate this in your grantmaking, governance, and management practices. Start with one section at a time, individually or as a group, to prompt these important considerations.

## In families...

- Explore the history of how the family accumulated wealth, and how the foundation might help heal any historical injustices.
- Model truth-telling about your own biases, blind spots, and comfort levels when it comes to money, privilege, and responsibility.

### *Ask yourselves:*

- How did our family accumulate its wealth? At what expense to other communities, groups, or our planet?
- What identities and roles do we carry as individuals, as a family, as a legacy, as a family name?
- How do we see ourselves? How do others see us?
- We experience privilege when... [fill in the blank].
- How comfortable are we talking about our race, social status, economic status, gender identities with each other, within the family? Outside the family?
- What's our responsibility/obligation to those who haven't experienced the same power and privilege as we have?
- What are our blind spots? Who can we ask about our blind spots (who will tell us the truth)?

## In governance...

- Consider a mission and program purpose that creates room for communities to build power themselves.
- Diversify the people and perspectives on your board, giving them equal voice and vote. Support them in staying grounded and accountable to the communities they come from.
- Be sure that foundation policies and systems support true diversity, equity, and inclusion—in both words and action.
- Consider the ways that perpetuity perpetuates power. Explore ways the foundation might eventually transfer wealth to the community or causes aligned with your mission.

### *Ask yourselves:*

- How does our mission and strategy self-empower the people and communities we most want to support?
- How do we make sure our board (and staff) have access to all of the information they need to do their jobs well?
- How can we include people who don't look like us, and also support them in sharing their wisdom and staying true to the communities they represent?
- What policies and practices do we have (and need) on diversity, equity, and inclusion? How often do we revisit these policies and practices? What outside expertise can we engage to make sure we are "walking our talk"?



- How often do we revisit our policies around spending and perpetuity? What are the biggest benefits to perpetuity—to our family, to our institution, to the communities we serve? In what ways could “defaulting” to perpetuity actually thwart our mission over time, by holding onto resources that could make rapid change?

## In grantmaking...

- Examine and be transparent about your processes—how you ask for and vet proposals, how you monitor grants, the reporting you require, how you evaluate grantees, and how you make decisions.
- Go to grantees. Rather than ask grantees to come to you, visit them at their own place of work or a neutral location, when possible, that is convenient and comfortable.
- Consider going beyond grants. In what ways can you give community members direct access to your foundation (without a nonprofit as the go-between)?
- Transfer decision-making power to the community. Invite advisory boards or community members to participate in or own decision making that affects them.

## Ask yourselves:

- How clear and transparent are we about our grant guidelines and grantmaking process—including how the board makes its decisions and evaluates grants? Can grantees and the public find this information on our website?
- Where are we asking grantees to jump through unnecessary (and perhaps costly) hoops? What can we do differently?
- How accessible are we to grantees and potential grantees who have questions throughout the grantmaking process?
- What relationships have we built with grantees? How comfortable are grantees in telling us the truth or sharing their mistakes and learning?
- How often, and in what forums, do we share our own mistakes and learning?

- How do we invite, include, engage community members as advisors and in our decision making? In what ways might we yield our own decision-making power to build the power of others?

## In management and internal operations...

- Look at where your foundation is located. Is it accessible to grantees and the communities you support? Is it warm and welcoming?
- Be clear about who you will hire, and your processes for hiring. Reach out beyond your typical networks to identify a range of diverse candidates.
- Use tools such as the fee-based Intercultural Development Inventory for staff and board to assess the foundation’s intercultural competency.

## Ask yourselves:

- How do we show up as funders in the community?
- Does our office location and management practices reflect and support the communities we serve?
- How clear and transparent are we in our hiring, management, and performance evaluation policies and practices? How do they reflect our values?
- What tools can we use to assess ourselves and our foundation? (See the Resources section for ideas.)

## In how you communicate externally...

- Identify and name inherent power dynamics, and create space for balancing these dynamics in whatever way possible.
- Ask grantees for feedback about the foundation and how it is performing. Create a rapport and relationship where grantees feel comfortable coming to you with the truth.
- Consider ways your foundation is unknowingly or consciously withholding information and learnings. Learn more by reading *The Link Between Transparency, Privilege, and Power in Family Philanthropy*.

## Ask yourselves:

- How can we respectfully identify and speak to the inherent power dynamics present between funders and grantees and community members—in meetings, in the community, and with our philanthropic colleagues?
- In what ways can we use our power and privilege for the benefit of others?
- In what ways can grantees give us honest feedback? How often do we ask them?
- How transparent are we as a foundation? How does our level of transparency affect our strategy and our relationships with others?
- In what ways can we support grantees in communicating their stories and needs?

## Ways to Bridge the Power Divide Between Funders and Grantees

**Higher End:** shifting decision making to the community; building power in the community; grantmaking with a lens of equity and inclusion

**Midline:** building authentic relationships in the community; inviting community members and people who don't look like you to serve on your board; giving them equal voice and vote

**Baseline:** asking grantees for feedback; listening and engaging communities you serve

## Resources to Learn More

To learn more on this topic, check out the following resources:

### NCFP Knowledge Center

[Racial Equity, Diversity, and Inclusion](#). NCFP Content Collection includes a variety of perspectives and tools for addressing REDI issues.

[Balancing Power Dynamics](#). NCFP's Family Philanthropy Webinar Series: February 14, 2019.

### Books

Orosz, Joel (2000). *The Insider's Guide to Grantmaking: How Foundations Find, Fund, and Manage Effective Programs*. San Francisco, CA: Jossey-Bass.

Shams-Lau, Jessamyn; Leu, Jane; Le, Vu (2018). *Unicorns Unite: How Nonprofits and Foundations Can Build Epic Partnerships*. England: Red Press.

Villanueva, Edgar (2018). *Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance*. Oakland, CA: Berrett-Koehler Publishers, Inc.

### Toolkits, Reports, and Articles

*Deciding Together: Shifting Power and Resources Through Participatory Grantmaking*. Grantcraft by Candid., 2018.

*Generosity and Impact Aren't Enough. Let's Judge Philanthropy on How Well It Shifts Power*. Inside Philanthropy, 2019: [insidephilanthropy.org](#)

*Grantmaking with a Racial Justice Lens: An Introduction*. Philanthropic Initiative for Racial Equity (PRE): [racialequity.org](#).

*Is Grantmaking Getting Smarter?* Grantmakers for Effective Organizations, 2017.

*Power Moves: Your Essential Philanthropy Assessment Guide for Equity and Justice*. National Committee for Responsive Philanthropy, May 2018.

*Race Equity and Inclusion Action Guide: Embracing Equity, 7 Steps to Advance and Embed Race Equity and Inclusion Within Your Organization*. Annie E. Casey Foundation, 2015.

### Related Organizations and Websites

Building Movement Project: [buildingmovement.org](#)

Edge Funders Network: [edgefunders.org](#)

Glasspockets by Candid.: [glasspockets.org](#)

Intercultural Development Inventory: [idiinventory.com](#)

Nonprofit AF: [nonprofitaf.com](#)

Peery Foundation (Grantee-Centric Philanthropy): [peeryfoundation.org/grantee-centric](#)

Racial Equity Tools: [racialequitytools.org/resourcefiles/power\\_privilege.pdf](#)

Resource Generation: [resourcegeneration.org](#)

Youth Giving: [youthgiving.org](#)

Trust-Based Philanthropy Project: [trustbasedphilanthropy.org](#)

## About the Author



### Elaine Gast Fawcett of

PhilanthropyCommunications.com is a philanthropy writer, advisor, and communications consultant who has been writing stories since fifth grade. For 20 years, Elaine has worked to strengthen family philanthropy by shaping its themes and sharing the stories, tools, and practices that move the field forward. As a long-time contributing author for NCFP and others, Elaine has interviewed 1000+ philanthropists, entrepreneurs, and nonprofit leaders. She has written books, toolkits, needs assessments, articles, websites, and reports for foundations, philanthropy advisors, and grantmaker groups. With partners, Elaine serves as a key advisor for a new private foundation dedicated to funding solutions to the opioid crisis. She lives in the east San Francisco Bay Area (Walnut Creek) with her husband Ted, three young daughters, and a fish called Lucky.

## About the National Center for Family Philanthropy

The National Center for Family Philanthropy (NCFP) is the only national nonprofit dedicated exclusively to families who give and those who work with them. We provide the resources, expertise and support families need to transform their values into effective giving that makes a lasting impact on the communities they serve. Together, we make great things happen.

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