

Grantee Relationships and Power Dynamics

A Fundamentals of Family Philanthropy webinar recorded on July 8, 2021.



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FAMILY PHILANTHROPY

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Featuring:



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Transcript of the Fundamentals of Family Philanthropy webinar, Grantee Relationships and Power Dynamics. Recorded on July 8, 2021.

Nick Tedesco:

So welcome again, everyone. My name is Nick Tedesco and I'm the President and CEO of the National Center for Family Philanthropy. Thank you all for joining us today for our monthly Fundamentals of Family Philanthropy webinar. As a reminder, the series provides guidance on the core tenets of effective family philanthropy—from motivations and values, to governance, grantmaking, and succession. The series is also designed to equip philanthropic families with the latest information on evergreen topics in the donor lifecycle through practical takeaways and diverse family stories that illustrate important practices. Today, we are going to reflect on power dynamics, which we all know are inherent in philanthropy. A funder gives, a grantee receives. And this imbalance has the ability to inhibit productive honest partnerships and stymie successful outcomes. We do believe that funders must acknowledge these dynamics and learn how to responsibly navigate positions of privilege and power.

So our panelists today will cover how to build authentic relationships with grantees through trust-based practices and other approaches that will reduce power imbalances and lead to more effective partnerships. In today's webinar, we will explore three critical questions. The first we will ask is what power dynamics arise within funder grantee relationships? The second, what are some essential listening practices and how can listening and trust-based philanthropy encourage more effective philanthropy? And lastly, we'll ask how can family foundations reduce the power dynamics between their foundations and their nonprofit partners?

Before we begin, let me briefly share about our webinar technology. We want this webinar to be interactive, so please submit questions for the panelists. To ask a question, please use the question box on the current slide. When sending in a question, if you wish to remain anonymous, please indicate that. As a reminder, this webinar is being recorded and a replay will be made available to all attendees. If you experience any technical issues, please reconnect to the technology or email jen.crino@ncfp.org. And as always, you're welcome to chat with us on Twitter about today's webinar using the [#ncfpweb](https://twitter.com/ncfpweb). So now onto the programming, let me briefly introduce our esteemed panel before we move into the discussion.

Today we're joined by Tony Richardson, Executive Director of the Nord Family Foundation, Melinda Tuan, Managing Director of Fund for Shared Insight, and Mailee Walker, Executive Director of the Claneil Foundation. Melinda will begin with an opening presentation on grantee relationships and power dynamics and then will open it up for a full panel discussion. Mailee will have to leave a bit before we officially close, so please make sure to get any questions for her into the Q&A box early. And we're so thrilled to have you all with us to discuss this important topic today. And with that, I will thank our panelists, Tony, Melinda, Mailee. And Melinda, I will turn it over to you. I'm really excited to hear your reflections on this important topic. Melinda, thank you for doing this and welcome.

Melinda Tuan:

Great. Thanks so much, Nick. It's always a pleasure to do things with NCFP. It's been a pleasure to partner with you over the years and into the future. So today we're going to start with this piece that I wrote recently in the CEP blog about moving from deceit to trust and the necessity of listening. And this was really building on some reflections I had on a piece I'd written for the Stanford Social Innovation Review back in 2004 called *The Dance of Deceit*, about the power imbalance that undermines the social sector. And in that article, I talked about the dysfunctional power dynamics and the undercurrent of fear and distrust that too often exists between funders and nonprofits.

I also talked about the same power dynamics as it relates to nonprofit executive directors and their boards, and foundation executives and their boards, but that is a topic for another blog post and another webinar in another day. But some of the power dynamics that we see and I'm sure you've seen play out with nonprofits and funders have to do with how some nonprofits change their mission to adjust to the funder guidelines for grant dollars that they are seeking to get. They twist themselves into pretzels in the process of trying to meet funders, intricate grant application requirements and reporting requirements.

And nonprofits often labor for hours and hours without telling us how long it's taking them to do this and sometimes have to make things up along the way because of what we're asking them to do. And those are all characteristics of what I called the dance of deceit. And that unfortunately still exists today because of the power dynamic as funders have the money and the nonprofits are seeking those funds. One really stark example is I spoke with a nonprofit leader of color recently and she described her relationship with one of our foundation partners saying, "I love them. I don't care how nasty they are, because if I have a foundation who notices we exist and is giving me a huge chunk of change, I will put up with anything."

That is a terrible power dynamic that can exist and does exist. And I really appreciate this nonprofit leader's willingness to share very openly with me about some of the struggles that she faces as a grant seeker. I think we would all agree that this destructive power dynamic should not exist. Since I wrote the piece in 2004, I do see some promising developments. For example, there are 300 funders that have commissioned the Center for Effective Philanthropy's grantee perception report that gives funders anonymous, objective, benchmarkable data about how your grantees perceive you and your grantmaking practices.

And then ideally these funders are acting on that feedback and changing for the better. There are more than 6,000 grantmakers that are committed to working through GEO and lifting up grantmaking practices that best support effective nonprofits. Since 2004, there's this whole Leap Ambassadors' community of 300 nonprofits and foundation leaders that are raising expectations and promoting the adoption of high performance in our sector. And you may be aware of that during COVID more than 800 funders signed the Council on Foundations' pledge, and this pledge included eight commitments, but several of them really have to do with building the trust and about listening, making it easier for nonprofits to receive grants and report on their grants during COVID, receiving general operating support grants, converting project specific grants to general operating support.

And also there was a commitment in there about listening to people and communities and considering them experts in their own lives and aspirations. Now, I don't know how many of them just signed the pledge as opposed to actually acting on those and whether some of those actions around general operating support being more flexible about reporting will continue once we have this pandemic behind us, but I'm very hopeful that these new practices are ones that will stay. And we also know that our

growing number of foundations are taking steps to put equity at the center of their work. So these are all promising developments.

Trust-based philanthropy is one that in particular is a very promising development. And I'm so delighted to have Mailee Walker, who's been involved with trust-based philanthropy projects since the beginning to talk with us more about her experience at the Claneil Foundation. But the basic tenet behind trust-based philanthropy is that nonprofits know best what they need. Trust-based philanthropy has a values-based approach, and you can read more about it. There's a whole website devoted to it. But the idea of leading with trust, centering the relationships with nonprofit partners at the core of how you do your work to collaborate with humility and curiosity, to redistribute the power and work for systemic equity. And these are values that the organization I run, Fund for Shared Insight, very much embrace this well. So I think the growth of trust-based and the tenets of it being embraced by more and more foundations is a very, very encouraging and promising practice and one that I think will address these issues on *The Dance of Deceit*.

The six basic practices of trust-based philanthropy are: to give multi-year unrestricted funding (so general operating support grants); to do your homework in advance, to not put the burden on the nonprofits to be doing that; to simplify and streamline the paperwork around applications, grant applications reporting; to be transparent and responsive in the way that you relate to your grantees; to solicit feedback from your grantees and to act on that. And the grantee perception report is one way to do that (from the Center for Effective Philanthropy), and there are other ways to do that just in terms of how you're doing this kind of personal relationships. And then also to offer support beyond the check. There's a great resource that Mailee Walker shared with us that's going to be sent as the follow-up that basically has a testimonial of individual nonprofit executive director that talks about the value of that support beyond the check. It made me cry, it may make you cry too.

I just want to give you a brief overview on the Fund for Shared Insight, the organization that I have the privilege of supporting as managing director. We have a funder collaborative. There are 10 funders listed here on the top who each contribute to a pooled fund that's managed by Rockefeller Philanthropy Advisors. We have all these sidecar funders that come alongside with general operating support grants as well. All of these are multi-year general operating support grants, and we pull these funds so that we can accomplish our mission, which is really to help foundations and nonprofits meaningfully connect to the people in communities we seek to serve and to be more responsive to their input and feedback.

So that values tenet that trust-based philanthropy has to solicit and act on feedback is what Fund for Shared Insight is all about, but really emphasis on foundations and nonprofits connecting with people and communities. So not just stopping that relationship between the foundations and nonprofits, but extending it to people in communities. So very much though in line with trusting and listening relationships. Because our goal is that we envision a world where the communities and people we seek to serve and especially those whose voices are at least heard—those who've been historically excluded by our systems and structures, those who are victims of systemic racism and injustice—that those people's voices who are least heard are better off in ways that they define for themselves.

One of our signature initiatives is called Listen4Good. And this is one way in which we have tried to build the capacity of foundations and nonprofits to really listen deeply to people in communities and especially those whose voices are least heard. We have now worked with more than 550 nonprofit direct service organizations across the country to help them listen to the communities they serve and act on what they hear. We have done that in partnership with more than 120 funders across the country

and the Nord Family Foundation, where Tony Richardson is Executive Director, is one organization, one funder that's participated alongside us with Listen4Good.

So to date through Listen4Good, we have helped foundations and nonprofits listen to more than 200,000 individuals across the country who are often most harmed by the systems and structures we're seeking to change through our work. And we're often least consulted by philanthropy in terms of what the solutions are that would be best serving for them. So just as an overview, when we think about building trust, just listening is a necessity. And in the same way that trust-based philanthropy emphasizes that funders should trust nonprofits as experts in what they need, at Fund For Shared Insight, we believe that funders and nonprofits together should trust that the people in communities they serve know best what they need.

And all of this is around funders practicing high-quality listening with our nonprofit partners and funders, and nonprofits engaging in high quality listening and feedback loops with the people and communities at the heart of their work. And that's why I'm so excited today to have this conversation with Mailee Walker, from Claneil, who's been involved with the trust-based philanthropy projects and Tony Richardson who's been involved with Listen4Good to talk about how trust-based philanthropy and listening can reduce the power dynamics between foundations and their nonprofit partners.

So with that, I'm going to start our discussion with Mailee and Tony. Beginning with Mailee, just tell us a little bit first about the Claneil Foundation and the work that you do, and then if you can just give some examples of some of these power dynamics that exist between funders and nonprofits, that'd be helpful.

Mailee Walker:

Great. Thank you for having me in this webinar. It's such an honor to be here with both of you and talk about our work. So I run a foundation called the Claneil Foundation. We're in the Philadelphia area. Just to give you some sense of our scope, we award around three and a half million a year, so we're on the smaller side. We have four staff and we're very intentional about our dual mission, which is to serve the community and to serve the family. And this family stays very private in our work, but we do have about 20 family members involved in the foundation, whether on the board, on reading committees, on the finance committee. So it's a very active family that participates in our grantmaking. And like many foundations, we have a lot of interests in the family.

And so we have four issue areas that we support, which are food, education, environment, and health and human services. And how that shows up is we have three grant programs, we have a local grantmaking program across those areas, which support local organizations that are deeply rooted in the community. Our second grantmaking program supports younger organizations in the New England, Mid-Atlantic area, typically in their third, fourth or fifth year where they're beyond startup, but they are also not yet mature. And then the last grant program we have across issue areas are for past grantees that are going through a significant shift or change.

So that's us in a bubble. With the work that we do and with our small staff and our geography, I think for us, the power dynamics we realize are very real. And so what we try to do in some of those simple tactics that Melinda was talking about is we try to call back or respond to every organization that reaches out to us within 24 hours. So we're very intentional. I was in the business sector before coming here and before that I was in the nonprofit sector, but I take those business sector principles and look at

our grantees or organizations as clients exactly like we did in the business sector, and we apply that with how we work with the community.

Melinda Tuan:

Great. Thanks. And I should mention again, that Mailee is going to be with us just till 12:55 PM Eastern time. So if you have any questions for Mailee, make sure to put them in the Q&A and I'll try to address those as we're talking so we don't miss on that. So Tony, can you tell us a little bit about your foundation and also some power dynamics that you see it play?

Tony Richardson:

Absolutely. Thanks again for having me. I really appreciate this conversation. I think it's timely given what's happening across the country and especially within our sector, so I thank NCFP for taking the lead on this. So again, I'm Tony Richardson, Executive Director of the Nord Family Foundation. We are located in Amherst, Ohio, just 35 miles Southwest of Cleveland. We also do grantmaking across the country in areas where family members live. So as of now we're doing grantmaking in Greater Boston, Metro Denver, Columbia, South Carolina, and upstate New York in a small area in the Finger Lake Region, Yates County, New York, and Cleveland, which is right outside Llewellyn County, just East of us here in Cuyahoga county. Right now we are currently in strategic planning, but our areas of focus have been sort of broad.

So we've been grantmaking in education, arts and culture, civic affairs, and health and social services. And our grantmaking looks very differently depending on which community in which we're doing that work. So for example, in Lorain County where we're located, we focus on health and social services, really a responsive grant maker on the ground, really connecting with our partners in areas of food and security, housing stability, and then early childhood education has been an area of focus over the years.

And I think as we come out of this pandemic, we've been really thinking about ways in which we can support the nonprofits so that they can do their work in ways that they're going to need to ramp up, and their work becomes even more deep in terms of making sure that they can connect their communities to resources that may not be philanthropic, but maybe governmental agencies support other nonprofits as well as private sector support from corporate foundations. So yeah, we do have quite a bit of everything.

Melinda Tuan:

And how about some power dynamics? What are some of the power dynamics you see at play between your foundation and the nonprofits that you work with?

Tony Richardson:

No, absolutely. So I think in all funder grantee partner relationships, they're inherent, right? And one of the things that I think is important in that how we show up and we see our partners as human beings, as people, as professionals and subject matter experts. It's something as practical as where we meet, right? Like if you're inviting your grantee partners to your office, that's a different dynamic than meeting them out in community where they do their work, where they're comfortable. I think also to make these point about returning phone calls, returning emails and then inviting them to be a part of our annual

meetings, board meetings and not just going on site visits, but also being thoughtful about ways we allow them to have voice and create platforms for them to speak directly to our trustees and members.

Melinda Tuan:

Those are great solutions. And I think there are a number of things like that. And now I'm thinking too, we, through Fund for Shared Insight, have this funder action menu about how funders can listen more to nonprofits and to community. So we have that on our website, and that will be another link sent that as a resource, but definitely meeting onsite in the community would be another example. It also brings to mind a piece that a colleague at the Hewlett Foundation, Lindsay Louie, wrote up about the seven habits of excellent work with grantees. And the first one was, number one, respond in a timely and courteous manner to all grantees and potential grantees. So that's another way of like addressing the power dynamic. So I want to go back to Mailee. Can you tell us more about the six principles put forth by the trust-based philanthropy project? And remind me, how long have you been involved and how did that all come into being?

Mailee Walker:

Yeah. So I got involved in trust-based philanthropy probably about two years ago. And we were referred to it actually by a couple of grantees to get involved into that project. So I didn't know anything about it and learned about it. And to your point what you said, Melinda, which I love the premise is really that the grantees know what they need and starting with that premise. And many times in talking with funders and even my expectation in talking with grantees, I remember I was talking about the couple of organizations that we support and they were saying how traumatic it was to fundraise and really caused trauma on them. And so when they were telling that to me, so what do we do? What can we do better? And their solutions were actually simple. So it was call me back. They said, "Do you know what it's like to call 10 times and not get an answer?"

They said, "Do you know how hard it is?" I just actually spoke with a grantee yesterday. I told them I was going to be on this webinar, I said, "What advice do you have?" And he said, "Philanthropy in the nonprofit sector," he said, "the structure is set up to fail." And he had been in investment banking, he's young and then shifted to start this nonprofit, is of person of color. And he said, "It's a capital structure that's set up to fail." And I said, "Well, what do you mean?" He said, "Well, how many hour conversations do I need to have with a funder until I get money? I never know. Is it going to be 10, 15?" And so it's simple things. And that's what I liked about the trust-based philanthropy. That it's basically thinking, oh yeah, we can do that, but if we could all do that, we would be doing so much better.

And I know in looking at those practices that Melinda had up on the slide, there are some we do well and some we don't do well. And that's why I love that framework because it challenges us. And so one that we do do is all our grants are multi-year general operating grants. As of 2017, it wasn't the case before that. And I can tell you as an ED, as well as their program officer, that has allowed us to build much more authentic relationships with our grantee that had nothing to do with us and our personalities, but having that has allowed us to relax and it has allowed the organizations to relax. An area that we struggle with is "do the homework".

We are a small staff in a small organization, so we still ask for proposals, we still ask for materials, we try to streamline it, but that's an area that we're always challenging ourselves, should we do the homework, should the organizations do the homework? So I just wanted to highlight two of those because I think in

a reality of all the work that we do, we're good at some, and other ones, we're not so good. And other ones, maybe we decided not to do. And there's always some context or some rationale around it, but it always challenges us. Even yesterday, we were talking and we brought up trust-based philanthropy and how we could do better.

Melinda Tuan:

Yeah. Mailee, I love your point about just general operating support and those multi-year that allows you to have these relationships that are not just these one year cycles. I remember when I was running REDF in California, I mean, we made like 10 year commitments to organizations, which meant that when we were screwing up, they could say, "You suck," because they knew it wasn't going to affect their funding in the next year and the next. And they were able to be honest, brutally honest at times with us about how things were not working, because we were actually doing harm in some cases to them. But we can have those conversations because they weren't afraid that it was going to jeopardize their funding for the next year.

Melinda Tuan:

So I'm going to jump a little bit into this harm piece. I know that NCFP wanted us to ask this question and it makes you a little bit vulnerable in terms of answering it, but can you give us examples of where the power dynamic has gone awry and actually where your foundation, or you personally through your work have actually caused harm to your nonprofit partners? And then we'll talk about all the solutions to this and then have your points.

Tony Richardson:

I think it's a great question and I'm happy to jump in. I have several examples, but I'll give them one. Done at time as a program officer, we were sort of soliciting or not even soliciting, we just had a general grantmaking process and organizations would apply for grants. And so in the context of education, they would apply for grants to go into school districts to do good work. And at a time when this one particular school district was one of three districts throughout our entire state that were under state receivership, so I decided to go down to the district and have a conversation with them about being a state receivership, their strategic plan, which was required under House Bill 70. And they focused on operational capacity and needs, curriculum, finances, and they had to get all these different benchmarks to essentially get out of distress.

And we as funders were supporting nonprofits to go in to do work that wasn't necessarily aligned with where the strategic plan was to get out of distress. And what was going on was when we would award a grant or the funders in our community would award a grant to the nonprofit, they would go to the school district and say, "Hey, I have a grant from Nord, I'm coming in." And what we learned was not only did it not align with the district's plan, but also they had to commit other resources like some personnel space in the district, just rooms. Very basic rooms, just having space for a lot of these groups to program, and security. And again, they didn't ask for it, right?

And so one foundation decided that they wanted to focus on maybe just getting letters of support, whereas we here at Nord Family said, how about you all identify the support you need and then if there are partners that we are aware of, we can connect them to you, as opposed to organizations just

wanting to come in and do good work under the lens of just the charitable mission, which I think is great. But again, the unintentional harm was actually creating more work and misaligned resources within that particular district. So we rectified that in sort of the good grace of the district, but again, just there's an error but thought we're doing great.

Melinda Tuan:

And Mailee, do you have any examples of where Claneil has done unintentional harm?

Mailee Walker:

Yes. And I have many, as Tony said. And I have two, again, where I personally was involved that felt like you get that punch in the stomach, you know what I mean? So I felt two of those. And they were simple, but they were powerful. So one was with one of our grant programs called the Emerging Leaders Fund. And we were a couple of years into it and I'm always asking for feedback. That's just the type of person I am. And so I was asking two co-directors who had applied and I saw them at a conference. And as we were talking, I said, "Please, can you give me feedback? How is the process?" And one of them gave a really strange smile and said it was okay. And the other one looked at me, she said, "Are you kidding me? That was such a waste of time. Your questions asked the same thing over and over again. It's ridiculous."

And that was the punch in the stomach hearing that, but it was so helpful. And so our intention with the new grant program is thinking that we needed all the information from these young organizations and their leaders. And from that feedback, we went back and we did the application. And every year we always ask for feedback. And so we've changed it and tweaked it every year, but that was really realizing that we were taking so much of their time that they didn't need to spend on us, which they'd have spent doing their work. A second one was we call organizations if they get funding or if they don't. And so I had a conversation with the organization that we had a long-term relationship with, and this is in our grant program where past grantees can ask for funding if they're going through a shift or change.

And so in dialing the number, I had in my mind what I wanted to say, because we've had a long-term relationship with that person. So right when she answered the phone, I just went in and said all my reasons. I had my script and then I was done and it was silent. And I thought is everything okay? And she just stopped and she said, "Do you know what risks I took to be that vulnerable in this proposal and you just said no?" And it was a punch and it was really subtle, but I thought of that for weeks afterwards.

Tony, you said you recognize people as a human and I think in me wanting to be prepared, I didn't recognize her as a human. I just saw my definition, reasons, and wanting to be clear and didn't honor the risks that she took in really airing the difficulties of that organization to want to shift. And I already did the harm. So the conversation didn't end well, because I couldn't take back what I did, but I will always remember that. And that's where I underestimated my power dynamic. I never let her speak first. I had my script and I went straight forward with it.

Melinda Tuan:

Yeah. And I definitely have had examples of that. When I was running REDF too, we would go down and meet. It was good at least that we were going and meeting onsite as the grantees. And these were social enterprises that were providing employment to young people or people coming out of the criminal

justice system. And there was this one organization that was in Santa Cruz, California, that ran a silk screen printing company and we would go down every month, meet with them, "Let's look at your financials with business, let's talk about your staffing," all kind of stuff. And one time the executive director pulled me aside and said like, "Do you realize that someone was shot in our community yesterday? We are dealing with that and for you to come from San Francisco and come meet with us and ask for all these things, have your agenda, and not ask us or understand how we are doing as a community, we are mourning and we are suffering."

And it was like a slap in the face, which I needed and a gut punch. And I was like, I've totally lost sight of the people in the community aspect of this work and how I need to not just be... Bryan Stevenson talks about being proximate; I was physically there, but I was not emotionally personally engaged in what their reality is and partnering with them in that way. I couldn't throw away my script, I have written that and these are things we need to go through. We had this meeting scheduled a month ago. So I think those are all very sobering lessons. And the question is how do we take that forward? So I know Tony, I'm going to turn to you now, I know Nord is really committed to listening to your grantees into community as is Claneil, but can you share a little more about how you're listening and in particular how your efforts to listen are affecting the level of trust you have with grantee partners in the community?

Tony Richardson:

Absolutely. And I will start by just giving us some context, a historical context around the foundation. And I'm just very fortunate to work for an organization that are architects and founders of the foundation was very connected to the community. I mean, they started on the planning commission, city councils, school boards. And not only were they sort of even making investments monetarily, but there was a lot of non-monetary sweat equity, thought partnership and leadership that they were sort of contributing to the community. And we try to capture that same spirit and energy into our work. And I think they were able to see how this broader public sector in the importance of being able to understand how systems work to inform our grantmaking. And we still carry that same approach in terms of how we do our work.

And so when we think about listening, we do it in a multitude of ways, right? I mean, there's a traditional sort of transactional grant process, where there's an application and final report. I've mentioned earlier how we engage our partners and create platforms for them to engage with our board members in annual meetings and board meetings. We also create opportunities for our partners to travel, to meet similarly situated organizations and leaders and communities throughout our grantmaking footprint through peer-to-peer exchanges. We also connect them to other funders when we can't sort of support or it doesn't align with our mission or strategy around work that they may need to be unfunded and then also sort of community stakeholders at large, we do a great job of really connecting our partners to elected officials, policy makers, you name it, right?

And so I think through all those different mediums and platforms, we're able to listen and get a sense of what those needs are and then really sort of approach the work as in not so much this is what we want to fund or how we want to fund, but what do you need and how does that make sense? And I think being able to leverage that listening is important, but I also think it's the learning and the co-designing that comes through that relationship and work, right? It allows you to be deeper at work more effectively, more efficiently. And I think it just builds trust, right? Because they see you in the community, they see you connected with other foundations, other partners and they understand that you appreciate their work, you understand the ecosystem in which their work is functioning and we're

more than just a funder, we're a community partner, right? And our dollars are just one resource we hold.

And so going back to one of the tenets of trust-based philanthropy, this idea of offer support beyond the grant, that's the work that builds the trust. And Eric Nord, one of the founders and architects of our foundation—I mean, this is like 40, 50 years ago—he said, "When the checks go out, that's when our work begins." And that captures that ideal of offer support beyond the check, right? So those principles and values have always been a part of our work and we're just very fortunate to be able to sort of push that forward.

Melinda Tuan:

That's great. Thank you for those examples. I love that, when the check goes out is when I work begins.

Mailee Walker:

I wrote that down!

Melinda Tuan:

So Mailee, how does Claneil solicit and act on feedback from your nonprofit partners?

Mailee Walker:

They likely do it all the time. So we've done it more formally with the CEP report and got great feedback there. And then I loved what Tony said about co-designing. And so when I think about our three grant programs, they were all designed with formal or informal feedback from organizations. And one example is called Our Partnership Fund. So for our grants program with past grantees, the reason why it supports organizations going through a shift or change is because we heard from so many nonprofits that we were supporting that it was so hard to get that support, especially when that shift or change was initiated by the community. They said, "We have to inform our board. We've got to tell funders why maybe our outcomes are different."

And so we heard that over and over again and that's really what created the grant program. So much so that even the first grantees looked at the description and we said, "Hey, this is what we described too on our website, does this make sense?" And they edited, they changed the words. So really all of our grants have organization and their input in there. And they've help co-design it with us and helped us evolve because in the end, we're nothing without our grantees, we really aren't. I don't run a nonprofit and so they have the knowledge base, and so we really try to use that on an ongoing basis.

Melinda Tuan:

That's great. And so how do you think that's affected the level of trust you have with the organizations you work with?

Mailee Walker:

I think it definitely affects the trust because we get questions from nonprofits to say for example, why didn't you... One of our proposals questions is, "What do you wish we asked you?" That's actually the only additional question other than one other from the LOI. And people said, "Well, why did you ask that?" I said, "Because do you know how many times I hear from organizations, I wish you asked me this?" So that became the question. Like what do you really wish we asked you? We don't know your work and we also cover... I mean, we might be different from some of these on the webinar, we also cover a lot of different issue areas. So we don't come in as the education expert, as the food expert, we come in knowing that the organization leaders and their staff and their community, they are the experts because we're much more generalist as funders.

Melinda Tuan:

Yeah, that's great. So I know there were some questions coming in, I'm tracking them. So I just want to acknowledge that we know that there are questions coming in, I'll weave them in as we go. But before we do that, Tony, turning to you, I know that Nord has nominated two of your nonprofit partners to participate in Fund for Shared Insights Listen4Good program, so I'm wondering, how does building the capacity of your nonprofit partners to listen to the people and communities they serve affect the relationship you have with your nonprofit partners? Like what are you learning from that process?

Tony Richardson:

Absolutely. Great question. And I'll just give an example of one of Lorain County Health and Dentistry, which is our federally qualified health center here in our community. And they're headquartered in the City of Lorain, which is in Lorain County, but they have locations all through our county. And so when we nominated them for the Listen4Good, they thought this was an amazing opportunity to do something beyond sort of the traditional compliance surveys that they have to do as a part of a FQHC. And so we were like, wait, this is great. So how can we think more intentionally about ways to support your work focused on social determinants of health and particularly barriers to access to primary care and dental care, right? And so through that work, we learned so much about their patients, how they were serving their patients, what were some of the barriers.

And because we were sort of in this project and working together, during that time, they were also dealing with an issue in the City of Elyria, which is the second largest city in our community. They were leasing a facility and the landlord was ready to move on and didn't want to renew their lease. This is before the pandemic. This was actually at the end of 2019 because I remember it being in between Christmas and New Year; we've closed, but we're not closed, right? So I call a meeting here at our foundation, we bring in some partners and then because our health and dentistry didn't have a relationship or didn't know how to navigate the political systems, and they wanted to look at a location within that community which they were still doing their work, we were able to set up a meeting with the mayor, our state representative, our state senator.

And the reason why they reached out to the latter two was because at the time the state was going through their capital budget sort of sessions. And we wanted to connect our partner to a consultant that could allow them to apply or submit a proposal to pull down some of those state funds to create their own facility so that they didn't have to lease and they would have a permanent home on the South side of Elyria and the fifth ward, which is predominantly African-American and arguably one of the most under resourced communities in our county. And just to give you a quick note, the life expectancy of people in that community, particularly African-Americans is 64.8 years compared to a neighboring

community, which is 87% Caucasian and seven minutes away. Same community, different zip code, life expectancy is 80.2, right? So it is 16 year different, with a seven minute drive away, in the same city.

And so we were able to sort of work with the city, work with the planning board. And again, this didn't take any money from the foundation. I think it was like a \$5,000 grant to pay for the consultant for the capital budget request and then we as partners, I think our board approved a \$100,000 grant to help pay for their dental facility filled out as they were attaching that to the center. So all said, we do Listen4Good. It brought us closer together. We could have these conversations and necessarily worrying about our traditional relationship with them that that comes through our traditional grantmaking portal, this was more about, again, other support beyond the grant out in community. So building that trust through the Listen4Good Initiative allowed us to really have those candid conversations about what do you really need? How do you best leverage our relationship as a grantee partner funder? And again, it wasn't necessarily about a dollar, it was about connecting them to other resources and people in community that they'd naturally didn't have those relationships with.

Melinda Tuan:

Yeah, that's great. So I'm going to just bring in that couple of questions from the Q&A. One is maybe directed... I can't remember Tony, do you do general operating support grants as well?

Tony Richardson:

Absolutely.

Melinda Tuan:

The question is, does a general operating support grant depend on the size of the grantee? Does it make a difference? What size?

Tony Richardson:

Not at all.

Melinda Tuan:

Simple answer. No. So just give general operating support. It doesn't matter how big the organization is or how small. And then this is a question that comes up for us at Fund for Shared Insight as well around asking for feedback. So the question is, for small foundations granting under \$500,000, do you think it's a time burden that smaller donors can put on organizations when soliciting feedback? Are there better ways to solicit feedback for the smaller donors and foundations in ways that are less burdensome for the nonprofits and the members of the community? How do you right-size?

Mailee Walker:

Yeah, that's such a great question. So we struggle with that. We did the CEP report. I actually had one or two of our grantees who told me, they said, "Maybe we'd love to do it. We don't have the time. I hate filling CEP reports. We've done too many of them." So that is a lot...I know one time when we were shifting our local grantmaking program, what our program officer and I decided to do was during calls

for funding—so organizations had submitted proposals to us, we were having the calls with them to check in—and during that call, we thought, okay, well, let's ask them what are some best practices that you see other foundations doing? So they weren't upset at us, they didn't say, oh, we don't... They're going to give us that, but we got really good helpful insight. And that's actually what shifted us to become all general operating multi-year support because guess what? 99% of them said, the best thing that foundations can do is general operating.

And we've literally put that into quote, many quotes and shared that with our board that this is what nonprofits are saying. It took no more time from us. We were doing the due diligence call. It literally took three to five more minutes and we got some of the best feedback ever that we could share with our board. So I hear you, you have to be creative. And during COVID actually, we pulled back because we heard from a lot of our grantees that so many foundations were asking them, especially people of color, especially black leaders. And so we said, "Look, we're going to pull back. We can get enough from other reports or talking with other funders or if another funder did get feedback, we use that." So we actually decided not to unless organizations came from us. So it is a dance.

Melinda Tuan:

Yeah. And hopefully not a dance of deceit but a dance.

Mailee Walker:

I love that question because sizing is key.

Melinda Tuan:

Now I think one thing too that we've done is from the reporting standpoint and incorporating feedback is instead of asking people to write their narrative, let's have a phone call. A phone call that takes such... I mean, now that we're like out of the super intensity of COVID for many organizations, back then a phone call would have been burdensome. But now as you're thinking, okay, like six months from now, when your grant is up, instead of writing a narrative, just let's schedule like an hour long phone call. It doesn't even have to be an hour, but I can take the notes. You can tell me and then it's like the doing the homework piece that's the trust-based philanthropy principle, but also reducing that burden. And frankly, it probably is less burdensome for me to have a phone call than to read all of these reports too and then process it and then all that.

Tony Richardson:

Yeah.

Melinda Tuan:

So question for Mailee again, with a limited staff of four people, how does Claneil manage the workflow and volume of requests for your competitive grant processes? I worked for a similar sized organization with three staff and we're invitation only. Can you speak to how having an open competitive process versus an invitation only affects the power dynamic?

Mailee Walker:

So I fully believe in open processes because I know that I don't know everybody, and research about networks show that our networks are typically our own race. And I grew up with that. So I'm half white and half Chinese. My mom immigrated to this country in her 20s. I grew up in a white community, but anytime we had any social event, it was all Chinese. And so that just shows you that you can live in a community and not be a part of it. And growing up with that reality has really shaped my lens and who I know and the limits of my own networks. And so as a small step, we had to make some really hard decisions when we went to multi-year general operating. So we used to award about 200 grants or so, now our portfolio is 50 to 60, and that was the hardest thing for the staff.

We always say there's two sides to every coin and philanthropy. And so that was really, really tough. We also track when we provide any support guidance beyond the check. And so last year we did—and again, we have four staff, three full-time, one part-time—we did 312 conversations consultations, 40% were with grantees, 60% were not with grantees. And of those with grantees of the support that they needed, about a third was around organizational development, a third was around fundraising, and a third was around visibility. So we're really intentional about having those conversations and we can do it now because we have multi-year operating support. If we still were doing the 200 grants, single year grants, it was hard. And literally we were going from grant cycle to grant cycle, and we didn't have intentional relationships with many of our grantees, maybe a handful, but we had to make some really hard decisions to make it possible.

Melinda Tuan:

Yeah, for sure. Thank you for that. So I want to make sure to capture more of Mailee comments. Tony, we will get to you as well, but we have more time with you, so Mailee, what advice do you have for other family foundations who want to have better relationships with their nonprofit partners? How can they best implement trust-based principles in their work?

Mailee Walker:

Multi-year general operating support is one. I just can't... I've lived with it and without it and I could tell you, it takes about two to three years for me to gain the trust of a nonprofit person and it never fully happens. But I feel like after three years, the conversations we had compared to the first two are very, very different. And I've just seen that pattern being here for 13, 14 years. And I would say we lead with listening. That's all I can say. Everything we do, we ask questions, how can we do it better? We do that in everything that we do.

And so when we lead with that, hopefully... And again, I know that we probably get a lot of niceties but I think that's key. And then as Tony said, we call back every person who reaches out to us, whether they're a grantee or not. And I think that lets the community know that we are responsive and in the CEP report, we were ranked the highest around responsiveness. And so we do that with everybody. And so foundations have reputations. We might not want to know what they are, but word gets around pretty quickly. And so we treat everybody as if they were our grantee and do what we can and we live by that.

Melinda Tuan:

What advice, Tony, do you have for family foundations that want to reduce the power dynamics?

Tony Richardson:

Yeah, I think several things, right? And Mailee just nailed it. Multi-year general operating grants are so important and vital to an organization's operations that I can't begin to explain and talk about what I've heard from our partners around just that point. But I also think it's important that our grantee partners and communities we serve see people in our foundations that come from communities like them, right? Like whether it's that particular community or a similar situated communities, I think that's so important. I mean, in terms of power dynamics and being able to engage. I also think as I mentioned earlier, like how we show up, right? It's humility, it's self-awareness, it's a choice how we dress, how we drive, what we drive. All those things matter in community when you're trying to seek just authentic partnerships.

And then I think it's also important that we take this approach of we don't have all the answers, right? And our partners in a lot of cases are subject matter experts and that's okay because we're here to essentially move community forward. And so it's not about who knows what, it's about how do we come together to do our work in ways that is meaningful and have deep lasting impact in communities we seek to serve. I also think about this idea of evaluation and reporting and that we see it as sheer learned experiences and not punitive exercises or gotcha moments. That's not what we're here to do, it's what do we learn and then if we fail, how do we do it better next time.

That's what it's about, right? So it's this iterative process around trying to get it right. I mean, poverty is a by-product of cabalist paradigms of development. So we're not going to end poverty, but again, we've seen amazing breakthroughs in communities and advanced in social justice and issues. And so we can continue to do that work. And I think it's also very important for foundation staff to just really understand and ground ourselves in this idea that we work for the foundation, but the money is not ours. The money isn't ours. And so we need to wear that and be aware of that as we engage, we're in very, very privileged positions and so we must carry and hold space for that when we're out in community and engaging with community at large.

Melinda Tuan:

Great. Those are such powerful points that you've made, Tony. Thank you for those. So just a couple of closing questions for Mailee and Tony, you can join into too. This is from the Q&A but when you talk about the importance of general operating support grants—and we have a following resource that's going to be sent out to everybody too that talks a bit more about that—what criteria then do you use to select those grantees for general operating support? Is this multi-year commitment? And then to your point, Tony too, when you're talking about evaluating the results, then how do you take a trust-based approach when asking the organizations to evaluate their work? I'm going to start with Mailee and then she's probably going to have to jump off, and then Tony.

Mailee Walker:

I do unfortunately. And I'm happy to talk with anybody on this and I learned so much from other folks, especially in the family foundation world. So we have committees for every one of our grant programs and so what we try to do is be as clear as we can in the description of our grant programs. And we constantly share them with grantees that say, "Hey, was this clear? How could we be clear?" So that's really what we try to do to be as clear as we can to make decisions in general operating. And honestly, it

hasn't been that different than when we did project support. And I actually find our board and the committees asking deeper questions, because when you're driving a car, you want to know how the engine runs, how are the tires? What does the steering wheel look like? I felt like when we did project support, we were just looking at the right tire in the front of the car. And nobody was asking questions about the engine, how the windows do and do they roll down?

And so I actually feel like those conversations have been so much deeper because we're looking at the organization overall as a whole. I think the other piece that's been helpful, so on our board, it's all family members. We have three non-family members. Those three non-family members are all with organizations that were funded by the foundation in the past, two of whom are people of color. And so their perspective in these conversations are helpful too. And sometimes our board members, which will turn to us and say, "Are we crazy? You applied to us, are we asking the right question because you're funded by us." And so being able to have that honesty in the boardroom and have them comfortable giving that feedback... And they're board members, they're my bosses, but to have those is so helpful and for me as well. So I will leave with that, but thank you for having me be part of this. I really appreciate it.

Melinda Tuan:

Thank you so much, Mailee.

Tony Richardson:

Thank you, Mailee.

Melinda Tuan:

See you next time.

Tony Richardson:

Talk soon.

Melinda Tuan:

So Tony, can you talk a little bit about the evaluation piece because it builds on what you were saying earlier about the... I mean, clearly the foundation does need to evaluate the work that it's funding, how do you take a trust-based listening, sort of "do no harm" approach to asking organizations to evaluate their work?

Tony Richardson:

Absolutely. So, I mean, because our work is so different not just in the communities, but across our program areas, obviously there are certain specific metrics that are created by our partners for them to evaluate performance. And so we really refer to them in terms of how they evaluate themselves within their broader work in the ecosystems that they function. And for us, it's a matter of again, what do we learn? How do we do it better? How do we do it differently? Or if it's already running well, how do we continue to do it and what's the right support for you to continue doing the work at the level in which

you're doing it? And I think also to Mailee's point about our board and its composition, we have 12 board members, nine of whom are family members and three are community trustees at large.

And of those three, two of the three are people of color and they come from the communities that we serve and they bring a wisdom and a connection to community in ways that even some of our staff may not just because of their background and different experiences and different skillsets. So it creates an environment in our board room that is one of just curiosity. And I think in that curiosity, we're able to continue to ask the right questions, but not in a way that's burdensome. And I think in general operating when we think about that as an approach of funding, I'll just say this, I'm almost quite sure that about 90% of our grant making is general operating.

So we've really gotten away from project-based grantmaking where organizations do apply for project grants, our program officers do... I mean, they offer general operating support as something that they could recommend to our board. And it's again, what do you need? How do we best support? And so I hope that captured the question. I think it's really nuanced depending on, again, like the organization, the work they're doing, the subject matter, right? So it just looks different depending on who's applying.

Melinda Tuan:

Yeah. Well, I'd refer to Casey who asked the question, whether we answered your question, feel free to put in the Q&A if there's a follow-up question or any other ideas you have. As I mentioned, in our work for Fund for Shared Insight, we're really trying to reduce the burden on the organizations in terms of having to do these evaluations. And it was funny when I first started work at REDF, my founding executive editor said valuation is a bad word because he just felt like it was often so punitive. It was retrospective. It was punitive because thinking we're hovering over organizations, instead, can it be about learning together? And that's what we're trying to move towards conversations about what they're learning as opposed to reports that they have to check the boxes and fill out all the narrative.

Tony Richardson:

I think that's a great point. I mean, during our COVID response work because of the relationships and the deep authentic learning and trust that we build with our partners, there were no applications. We were able to send dollars to organizations because we knew who they were, we knew their work. And I'm thinking like, as we come out of this, what does that look like? And should we be thinking about rolling application submittals as opposed to just three cycles, huge process, writing applications. So I'm just hoping that some of the learnings that we learned or some of the things that we learned during a pandemic we carry forward post-pandemic, but we'll see.

Melinda Tuan:

Right. So I'm going to start asking some of the questions that are coming up in the Q&A and there's a thanks from Casey for your response about the evaluation. So I think we answered the question. Julia is asking when requesting project funding, the organization presents a project budget, which is clear. However, when applying for general operating support, how does the organization or the foundation establish what the budget request should be? Like how much did they ask for in terms of GOS?

Tony Richardson:

Absolutely. So we, as a staff, we've always just told organizations to apply for what they need. We make recommendations to our trustees based upon our grantmaking budget. And so when we look at the organizational budget, we use that to get us a sense of like what the need may be or may not be as opposed to projects. And then we also look at sort of co-invested like, who else is funding? How much money are they getting from government? In the cases where we're working with organizations that are intermediaries for government, we know that a lot of their dollars are restricted to specific programs and projects and that's where I think general operating dollars make a big difference, right? Because a lot of the federal dollars go to our programming, but it doesn't support administrative or people who are actually administering the programs. Again, so depending on who you are and what you're coming for, we'll assess that against our budget and also sort of who else is applying at that time because we can't fund everything.

Melinda Tuan:

Yeah. And are there resources or templates that you've seen or that you're using to establish better grantmaking practices like protocols or processes?

Tony Richardson:

Yeah. There's quite a bit out there. So we have some internal things that we've created, but also I think you had mentioned Leap Ambassadors—they have some amazing outlines and templates. Obviously CEP, we've also used the grantee perception report. There are a lot of different tools out there. We work with a lot of our philanthropy supporting organizations and they share a lot of things as well. So yeah, I would definitely look at the Leap Ambassadors. Their work is amazing around just that question.

Melinda Tuan:

Yeah. I'll make sure to send out some links to Leap Ambassadors as well on those resources. And I know there's a movement to have like how the college applications are moving like to the common application, could you move grantmaking to like a common app as well?

Tony Richardson:

We've talked about that as well to our communities that we do grantmaking. Yeah, absolutely.

Melinda Tuan:

Yeah. So I have a question for you, Tony. At Fund for Shared Insight, we're all about foundations and nonprofits listening to people in communities—how can foundations ensure they're listening not only to their nonprofit partners, which is super important, but also making sure that the foundations are listening to people in communities they serve. Because often when we get the question, can't we just listen to the nonprofits as a proxy for the community, should foundations be engaged in listening directly to people in communities?

Tony Richardson:

So I think obviously the Fund for Shared Insight in the work with Listen4Good allows us to do that. We also did some work with CEP in the Chronicle of Philanthropy, staying connected and we were able to

bring one of our grantee partners, El Centro, ran by leader of color and predominantly serves our Latinx community in the City of Lorain and Door County. And they were able to bring one of the people that goes to that organization for resources. In that particular city, I think we have the second largest Puerto Rican population in the country per capita behind New York City. And so she didn't speak in English. And so having her a part of that conversation and not only thinking about sort of the socioeconomic barriers, but also the language barrier and how that could sometimes create disparities in terms of the haves and have nots, that was an amazing opportunity.

And in fact, when they came to do the webinar, they had to come to our office because they didn't have the capability, technological infrastructure. And so this was a couple years ago, this was pre-pandemic. So that had me thinking about our partners like, how many of our partners don't have the requisite infrastructure to be able to sort of do these types of things and connect their partners or the people they serve to just the broader world of internet and things. So that was another way that we were able to listen. Earlier this year we convened community around the funds that were rescinded from our county commissioners that were supposed to go to the nonprofit community to have an understanding of why that was done, and then to figure out solutions to either get those dollars back to nonprofits and then two, just connect our nonprofits to those folks because they didn't have a relationship and vice-versa.

We also when we're doing our initial strategy work around strategic planning, we had the communities convening. We just didn't invite partners, but also the people that they serve. And then through that facilitation, they were able to sort of participate, right? Print surveys, fill out, ask questions, share their perspective on things because, again, I think by demystifying the relationship between the intended beneficiary of our dollars, the nonprofit partner and the foundation, it just, again, allows us to be really impactful. It's not about hiding the ball or trying to create an imbalance between our partners and the people they serve, it's about, let's have an honest conversation and support you in a way that allows you to support the intended beneficiary in ways that make most sense for them.

Melinda Tuan:

So my final question for both of us is, what do you think the future is of listening and of trust-based philanthropy? What does the sector need to do? How can we encourage more people to get started in this work and where do you see this taking us?

Tony Richardson:

That's a really great question. I need to think about that because I have a lot of different ideas around it, but I'm curious to hear your thoughts on it, and then I'll go after you.

Melinda Tuan:

Yeah. I mean, Fund for Shared Insight, all of our work is really around listening and acting on what we hear from nonprofits, from people in communities. And so we're working, we have a portfolio of grants that we've made to NCFP and GEO and CF Leads and other philanthropy support organizations to create some more tools and resources for foundations specifically about how to listen and how to act on what you're hearing and to listen deeply. So we're a year into that process and we're hopefully going to have some tools and resources to share, which will be coming out of these various organizations. I also mentioned this funder action menu that we have on the Fund for Shared Insight website and we'll

include a link to that as well. And we've just been collecting examples of how other foundations are engaging with community.

They're having their meetings in community, they're changing their reporting and their main applications to be more reflective of what community needs and what people are saying. It's a menu, so there's different categories and you can drill down and see like how foundation X, Y, or Z are approaching some of these various ways of listening and building trust and relationship with grantees. I've always said for Fund for Shared Insight, we're not an ongoing concern, we're not our own 501c3 response project, our goal is that organizations like NCFP would take on this mantle about listening and trust-based philanthropy and the importance of meaningful connection with people in communities. And that would be built in, baked into the missions of GEO and of CEP and of NCFP. So then our job would be done because it would be part of the norm and expectation that foundations listen to their nonprofit partners, they listen to people in the communities they seek to serve, and they act on what they hear and that there's more of that open trusting relationship.

And then that would address my *Dance of Deceit* that I wrote about in 2004, where you can never get rid of the power dynamic because whoever has the money and whoever doesn't have the money, that's always going to be a power dynamic. And that's also practically why we're experimenting with participatory grantmaking at Fund for Shared Insight, which is ultimately not just sharing power, but like you have the money, you make the decisions about who should get the funds.

Tony Richardson:

That's what I just wrote down. That the future of this is participatory grant making. We see it in community development departments in certain cities. We've seen it for years, where community come in, there's a process and they co-design where those dollars should go. So back in mid-March right after or before our shut down here in our state due to the pandemic, I convened our local funders and said, "What's going to be our collective response to this pandemic?" We didn't really know much about it. In fact, we thought we will be back in our offices in mid-April, right? Or June at the latest. And so we said, we're really on the same page. And another private family foundation said, "Do you think you're going to step on the toes of the community foundation if you convene?" And I said, "This is not about that. This is when leaders lead and this is a time that someone needs to step up," because there was no one really talking about. So we convened the different funders. We created our COVID-19 fund here in our county. But one of the caveats to it was I was just really adamant about us making sure that we had people from the community with lived experience expertise sitting on those committees that distributed and awarded the grants.

And so I asked all the funders to identify two people from grantee partners in the same community to represent their foundation. I didn't go to one committee; I nominated two people, one from El Centro. So Laura Spinnet, she identifies as Puerto Rican and an African-American woman of color. And they represented the Nord Family Foundation on these calls.

And we didn't know, right? And so again, it was modeling what we think this work should look like. But we did stay in touch. I mean, we obviously started it and see that we received sort of the updates on who was awarded, where dollars went, but now some of our partners in our community are thinking about ways to engage people with lived experience, expertise, participatory ways of engaging, thinking about grantee perception reports and just doing the work differently, right? Because to your point, it's about a value. It's about an energy. And it's not so much about what we do. As my grandpa would

always say, "It's how you do it. It's never what you do, Tony, it's how you do it." And I try to model that in my work here at the foundation. And I think that's what the legacy of this foundation is. And so that's why it's a happy marriage here.

Melinda Tuan:

Yeah. Well, I am so glad that we asked you and Mailee to be on this panel, I'm sure my NCFP colleagues are also just delighted about this, but at this point, thank you for all that input and answering questions. I'm going to turn it back over to NCFP and I think Nick Tedesco is going to close us out.

Nick Tedesco:

Yes. Thank you, Melinda, thank you, Tony and thank you, Mailee. I know Mailee had to jump early, but this has been an extraordinary call to action. I just so appreciate the conversation. And we at NCFP are really grateful to be a grantee of the Fund for Shared Insight and to bring forward a conversation on listening and participatory grantmaking and do a bit of that in our work. So Melinda, we are so grateful. And thank you again, Melinda and Tony for your wise words here. So before we sign off, we just have a few brief announcements about our upcoming programs. So next month we have another *Fundamentals of Family Philanthropy* webinar event. This one is on impact, measurement, and evaluation. So very timely and topical as we were talking about that this afternoon. It'll be on Thursday, August 12th from noon to 1:15 PM Eastern.

And in this webinar, we are going to talk about how to develop strategies to monitor and evaluate progress with grantee partners and reflect on how to leverage impact and do that with a trust-based lens and do it in an equitable manner. NCFP is also hosting our Trustee Education Institute September 28th through the 30th. And we're excited to welcome back Melinda and others in that conversation. This virtual gathering really does provide a comprehensive overview of the important legal, investment, ethical, grantmaking, and family dynamic issues facing family philanthropy board members and their executives. Both the trustees and the executives are invited, so we would ask you to spread the word.

And we are also pleased to offer peer networks for those interested in connecting to your colleagues with similar objectives, challenges and shared experiences. We recently launched our new board chair peer network, so if you are a board chair looking for peers or think it's a good opportunity for your board chair, please contact Katie Scott at Katie.Scott@ncfp.org. And don't forget to connect with us on social media. Thank you all so much for joining us today. And I hope that you all have a wonderful holiday weekend and that you take some time to rest and reflect this summer, and we look forward to being in conversation with you. And thank you again, Melinda, Tony, Mailee, thank you so much for your guidance and wisdom. So take care everyone. Have a good day.