

Evolving your Family Philanthropy: Bold Transparency

A *Fundamentals of Family Philanthropy* webinar recorded on September 9, 2025.



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FAMILY PHILANTHROPY

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Julianna Cagle
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Nathan Cummings
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Kenneth Rainin Foundation

Transcript of the *Fundamentals of Family Philanthropy* Webinar, Evolving your Family Philanthropy: Bold Transparency, Recorded on September 9, 2025

Britt Benavidez

Welcome, everyone. My name is Britt Benavidez. I'm the senior manager of Programs at NCFP. I use she/her pronouns. And for those using accessibility devices or who find it helpful, I'll also provide a verbal description. I'm a white and Latina woman with short brown hair, brown glasses. I'm wearing a black button-down shirt, and I have a Zoom virtual background behind me of a living room.

Thank you for joining us today for our monthly Fundamentals of Family Philanthropy webinar. This series provides guidance on the core tenets of effective family philanthropy, from motivations and values to governance, grantmaking, and succession. The series is designed to equip giving families with the latest information on evergreen topics in the donor lifecycle, through practical takeaways and diverse family stories that illustrate important practices.

Before we begin, I'll briefly share about our webinar technology. We're using Zoom's platform, and your controls are located along the bottom of your screen. Closed captioning has been enabled, and you can turn captions on and off by clicking the caption or CC icon at the bottom of your screen. We want this to be interactive, so please submit questions for the panelists as they come to you. To ask a question, please use the question box with the Q&A icon. When sending in a question, if you wish to remain anonymous, please indicate that by checking the box to submit anonymously.

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 try reconnecting to your Zoom link or email me for assistance. I'll drop my email in the chat in just a moment. As always, you're welcome to chat with us on Twitter about today's webinar using the #ncfpweb.

So, the annual Trust in Nonprofits and Philanthropy report showed that 57% of Americans trust the nonprofit sector, much higher than the government, media, or business sector. Yet, only 33% have trust in the philanthropic sector, primarily private foundations and high-net-worth individuals. Why is this and how can family philanthropy increase this trust? We'll answer that today during today's program, *Evolving Your Family Philanthropy: Bold Transparency*. We'll explore the many ways your philanthropy can prioritize transparency, grow trusting relationships with partners, be more accountable to communities, and ultimately enhance your effectiveness. Whether you're new to philanthropy or seasoned or a family member or a staff member, we hope you leave today's webinar with insights you can apply to your work.

So, before we get started, we'd love to know who's in the room with us today. If you could please answer this poll question. It's actually three questions. What is your role or affiliation with family philanthropy? Is transparency one of your organization's stated core values? And what are you hoping to learn during today's presentation? I'll leave this up for a few seconds.

We have a good mix of folks joining us. Some things you're hoping to learn. For most of you, transparency is one of your core values. Great. I'll leave this up for just one more second and then share the results with you all. All right, I'll let you all look at those results. Thank you so much for filling that out. It helps us shape the content and know who's with us today.

So, now I'm thrilled to introduce our panelists to you. Joining us are Heather Barberi, executive director of the Grunin Foundation, Julianna Cagle, executive director of The Goizueta Foundation, Jaimie Mayer, board chair of the Nathan Cummings Foundation, and Jen Rainin, CEO of the Kenneth Rainin Foundation. Welcome to you all. I'll invite you to join us on camera. And Julianna, over to you.

Julianna Cagle

Great. Thank you so much, Britt. And it's good to be with you all here in this space. Really excited about today's topic. I was sharing with our panelists earlier that my background is all in nonprofit fundraising and development. And I've always just been really intrigued and interested in what relationship building looks like across our sector, what transparency looks like, what communications, and just really feel like accountability is in our space. So, we also know that this current moment calls for bold transparency. It calls for accountability and to keep community sort of the center of all the work that we do in proximity. Here at The Goizueta Foundation, our founder is Roberto C. Goizueta, who really valued trust and transparency. In fact, they're two of our pillars here at the foundation. We look for those assets in staff that we hire and grantee partners that we work with and speak a lot about trust and transparency within the walls of our foundation.

So, we have up here some of the Trends data that you'll see, and findings suggest that family foundations are simply becoming more community-centered rather than donor-centered, which is a good thing. But also, over the past few years, we see really a decrease, I think, in some ways around what our communications and transparency has looked like post-pandemic. We see a gradual decline in family foundations accepting, for example, unsolicited letters of inquiry and/or proposals over the course of the past 10 years. In addition, we see fewer foundations are sharing with grant applicants the reasons that they declined their proposal. You can see 42% in 2025 compared to 55% in 2020. However, more family foundations are soliciting feedback from their grantees, 38% in 2025 compared to 29% in 2020. Fewer foundations report that they plan to initiate or expand opportunities for grantees to provide feedback. And you can see that data here as well.

Far fewer foundations in 2025 plan to increase transparency by reporting about the philanthropy in general or by sharing the demographics of the board, staff members and/or grantees. So, we sit in sort of this interesting moment, I would say, in this tension of a lot of transparency maybe in the pandemic days and less so over the past few years. Of note, funders donate 62% more on average to organizations that are transparent about how their gifts are used than those without such transparency. This was a study conducted by Candid that found those results. And transparency tiers are based on infos that the nonprofits share with Candid. So, we expect straight transparency from our grantee partners, but we are not always necessarily willing to be transparent within the foundation itself.

So, I'm really excited about our panel today. We've got Jaimie, Jen, and Heather. And so, I would love to turn it over to you all first to introduce yourselves, if you don't mind, also providing a visual description, which I forgot to do at the top of my presentation. I'm a Caucasian female with blonde hair and wearing a blue blazer and a light blue top. So, I will turn it over. Let's see. Let's go Jaimie and then Jen and Heather in introducing yourselves, a little bit about your foundation relating to size, assets, et cetera. So, turn it over to you all. Thank you. Jaimie.

Jaimie Mayer

Hi, everyone. I am Jaimie Mayer. I use she/her pronouns. I have, I think it's shoulder-length now, dirty blonde, curly hair. And I'm wearing a blue and cream striped sweater. I chair the Nathan Cummings Foundation. We're, depends on who you ask, but around in our 35th year as a foundation. We have about a half billion dollars as our corpus, and our grantmaking budget is 16 to 20 million any given year.

Our focus is racial, economic and environmental justice in the United States, with 40% of our funding going to the Deep South as well as Israel-Palestine.

We have a totality-of-assets approach within the foundation. So we look at our impact investing, which is 100% of our endowment, our PRI carve-out, which is separate from the impact investing, our grantmaking, and our communication strategy as the way that we can have impact across the organization. And so, we have KPIs to measure that impact, and that's our totality-of-assets approach. The foundation itself is in its fourth generation in terms of family members. And I am concluding my seventh year as chair of the foundation and as the first chair of the fourth generation.

Julianna Cagle

Great.

Jen Rainin

All right. Jaimie, you and I need to talk about this whole how-old-is-your-foundation thing as we have the same... It's a strange dynamic, but yeah, depends who you ask.

I'm Jen Rainin, the CEO of the Kenneth Rainin Foundation. I'm a white woman with short brown hair, blue eyes. I'm wearing chunky reading glasses and a blue and white striped button-down shirt. And I'm sitting next to a big window in my living room. The Rainin Foundation has been around... Okay, well, this is where it gets weird. But I say it is about 18 years old. That's how long I've been working there, and I started it on my father's death, which was 18 years ago. So, it's a whole thing. Our mission is to enhance quality of life by championing the arts, by promoting early childhood literacy, and by supporting research to cure chronic disease. We have about 35 people on staff at any given time, and our endowment is around 650 million. We give about 16 to 18 million a year, depending on the year. Yep. And that's what I've got. Heather?

Heather Barberi

Hello, everyone. My name is Heather Barberi. I'm the executive director for the Grunin Foundation. I use she/her pronouns. And quick verbal description. I am a white woman with short brown hair. I have on tortoiseshell glasses. And I'm wearing a pretty bright-colored patterned shirt today. It's pretty wild. And I'm in my office today with some artwork, some amateur, from a Staff Team Day that we did in the background.

The Grunin Foundation, we are a place-based foundation located in New Jersey, and our mission is to provide holistic support through funding, capacity building, and coalition building to organizations who have a shared vision of an equitable, just, and vibrant central Jersey Shore. So, we're a fairly new foundation. We were established in 2013. I've been in my role for eight years next month as a non-family staff member. We have a paid staff of 5 incredible humans and a board that's made up of 11. So, we have 5 family members and we have 3 generations there, so first, second, and third, and 6 community members, all of which are connected to the nonprofit sector in some way. We're actually a pass-through foundation currently. And so, our grantmaking budget is about 5.5 million annually. And we spend roughly another half a million dollars on our direct capacity building and coalition building work. And just excited and energized to be in conversation with y'all today.

Julianna Cagle

Great. Well, thank you all for introducing yourselves. So, let's dive on in. And this first question is, how does your foundation center transparency in your communications and practices? How do you decide

what, when, and how to share and learn with your grantee partners? And I'll turn it over... Any of you all can kick us off on that first question.

Jen Rainin

I'll go. At Rainin, we really look at communication as a tool for building trust, for fostering collaboration, power with our partners, really. It's really important to us to be open about our decision-making, about our learning and goals, even when our answers aren't necessarily clear or final. And also, we look at transparency as not inherently requiring perfection. It's just mostly sharing what you know and talking about the connection to the work, and sharing even when things are still evolving. That feels really important to me.

One of the things that I've really learned is that it can be really personal as well. One of the most effective things that has happened at Rainin is through our health work. We run a symposium every year for researchers in inflammatory bowel disease. I have inflammatory bowel disease. My dad died from complications from that disease. My son has the disease. So, a lot of the work... Oh, my dad had a huge amount of shame, too, around having this. He just came from that generation. He did not want to talk about tummy trouble. I don't have any of that shame. So I talk about it a lot, and I've made a point of talking about it specifically to reduce shame, to being super transparent about my experience and how debilitating it can be when I'm in flair.

And one of the ways that I do that, and it has been super effective and helpful, is at the beginning of all of our symposia, I share my personal story with all these giant-brained, many-letters-behind-their-names scientists, and then all of our board members and staff. I find that people come up to me after my speech every year and tell me how helpful it was to hear directly from me about my experience, excuse me, with this disease that they're all working on, little specific pieces to try to find more information and cures. It really reminds the group about the real people living with the daily challenges that are behind the data and the experiments. Really, I'm hoping by doing this that I'm fostering an environment of authenticity, where scientists will be more open in return. So they'll share not just their successes but also their setbacks and their needs, which I think is really, really especially important in research collaboration.

Jaimie Mayer

Thanks, Jen. That's really beautiful and a tough act to follow from such a personal place. When we think of transparency, there are so many different players and layers to it. When we think of transparency within the foundation, we have a culture statement that centers transparency in how we operate internally. With our grant partners and potential grant partners, we reopened our LOI portal about a year and a half ago. Our LOI portal had been closed for, I believe it was six or seven years. And there's this black hole of philanthropy, right? We do ourselves no favors in this kind of we're-in-this-ivory-tower-and-we're-untouchable-and-no-one-can-reach-us way of thinking that's out there in the world by letting that perception be the reality if we don't do something about it.

So, in opening our LOI portal, it was really saying, like, "Hey, open for business." Right? Like, "You don't have to know some extremely wealthy person or be funded by another foundation to get on our radar or be an organization that a board member cares about," or the different ways that we find out about organizations, right? There are so many extraordinary organizations out there that just don't have the network to get in front of us. So, that was a big piece for us in terms of our grant partners and the field.

With the field, we also put out white papers really frequently in terms of lessons learned. Often in philanthropy, I say, "You need to be able to pinch another human being who's done something to prove to your family that it can be done, or your corporate board or whatever your situation is, and be able to

often bring that person in so others can see a living human being who has done this thing before." We also are very transparent about our failures and celebrate our failures and often publish things about our failures. And last year, we put out our first impact report. We just came out with our second impact report last month, this year, which is another way that we're transparent in the field.

Outside of the field, I have actively been trying to get philanthropy a seat at the table, at tables that we're not usually given a seat at, so that people understand what philanthropy means, who we are, what we all do, what the sector is. It's something that people... I often refer to philanthropy as the free swimming pool that comes with a fancy apartment building. It's the nice-to-have, not the have-to-have for a lot of people. And we try to break down that barrier by putting philanthropy at tables where philanthropy is often thought of as the free swimming pool.

Heather Barberi

Another hard one to follow. But I think, and I won't add too much more here because I think Jaimie and Jen, you've covered so much, but for us, transparency is one of our core values at Grunin, and we really try to live it every day. And I think it really stems from our president, Jeremy, who's just such an incredibly authentic human. And I feel like from the get-go, he's fostered that environment both internally and externally. So, I think for us, it's not just about sharing information and how we share information, it's about showing up as true partners in the work. And I think that means really aligning our words with actions, not saying we're going to do things and not following through. It's about the follow through. It's about leading with humility and really being honest about the work even when it's hard.

And we do. You'll see that in how we communicate through our quarterly updates, our program emails, what's shared on our website. Shout-out to Kelly, our director of communications. She always keeps transparency at the forefront. But it's also how we operate internally with staff and board. I think our culture is, I can say, something really special internally. We're very open in sharing about the work. We're sharing our joys personally, sharing our struggles. And that definitely carries out into how we show up externally in our work. As well as our grant process is completely open. So we don't have LOIs. We actually don't even have a written application or grant cycles. Instead, everything starts with a 30-minute intro conversation with me. And anyone can schedule. My calendar is completely wide open, which sounds a little bonkers, but it's worked for us in really being open and building relationships with community.

And we also try to be really transparent about... Even though we have a open process, there is some process, and we'll talk a little bit about that later, but our process is really relational. There's no surprises, no gotchas. We share everything on our website. We share our rubric. We share our alignment questions. At the end of the day, I think we really want partners to know exactly where they stand and feel like this is a really collaborative process in our work and that we have genuine, authentic relationships with them. So that's kind of a little bit on the internal/external side.

Julianna Cagle

I love that. Thank you for sharing some of those examples, too. And that leads into our second question, which is, have your practices evolved over the past few years in becoming more transparent? And maybe give us some examples of, if so, how those practices have changed and evolved and what you all are doing now. Let's start with... Let's see. Jen, do you mind taking that one first?

Jen Rainin

Yes, I will take that first. Although I want to just jump into something Heather already said that really is just sort of sticking in here. You talked about your president, Jeremy, being sort of setting the tone for transparency and authenticity, and that's definitely a huge lesson that we've learned over time that how critically important it is, I think, that leadership really lives that value of transparency, particularly in an organization that's our size or bigger, with 35 people on staff to see... We are always at risk of the executive team being perceived as doing nefarious things in the room, behind the closed door or whatever. So we've started just opening our executive team meetings so that people can just come anytime and observe, see what we're talking about. And it's made a huge difference, actually. We do a lot of checking in with our staff to see how they're feeling and how the culture is feeling, and it's shifted a lot since we did that.

Anyway, sorry. We're supposed to talk about how our practices have evolved, right? Having just launched in 20... How old were we? 2007? Yeah. Ooh, 2007. We have been evolving nonstop since the door's open. And so our practices around transparency have evolved as well over the years. We've got a lot more effective as we tried and tested ideas and reflected on our results, but a big part of who we are lies in engaging our community perspectives. We know how much the act of transparency increases trust, both internally and externally. It's a big deal. Trust and transparency make stronger relationships, period. They just do. I mean, hell, look in your own marriages if you've got one, right? Same thing. And when we're being vulnerable with our staff or with our grantees, it's reciprocated. I think that's what you were saying, Heather. People feel more at ease sharing their own struggles, and that makes it easier for everyone to show up and figure out how best to partner together. It's where the learning happens, right?

Also, I think it really helps level the power differential. And that tracks both internally and externally as well. I guess my favorite example at Rainin was around the way that we look at our health grantees. Wow, it seems like I've got a lot of examples around our health work today. In funding researchers in inflammatory bowel disease, we noticed after a few years that although women scientists were applying for our grants at the same rates as men, they weren't successful at nearly the rates as men. It was really an interesting and surprising finding. And we also noticed at the time, our scientific advisory board was also all men.

So we made a concerted effort to change that. And now we're really tracking. We've created a report to share our progress, to highlight our efforts to increase representation of women. And we're looking at the number of women who speak at our symposia, who are successful in getting grants and also who are, of course, submitting applications. Our report shares where we're falling short in addressing persistent gender bias, and that's affecting medical research and our own grantmaking. So, we continue to share our progress. It's not always positive. That wasn't great. But being aware of it and being really intentional about addressing it, that's what feels important to me.

Jaimie Mayer

Thanks, Jen. I already mentioned our impact report and reopening the LOI portal. So those are two real concrete examples that I can give for us in terms of how things have changed. At Nathan Cummings, we've always been very strategic and specific in our funding. And we have, I'd say, always had clarity around that. But our focus has really shifted over the years. And so we're very transparent about that shift and about what we don't fund as much as we are about what we do fund, which I think is even more important to not waste people's time. As we all know, everyone wants you to fund everything.

I would also say, within the organization, we have a new-ish OCIO who we've been with for a few years at this point. And we have full transparency within the organization, Jen, like what you were talking about with your senior leadership team. Our program directors sit in on our investment committee

meetings. There's an open line of communication between the grantmaking side and the investment side because we're looking at our impact investing and our grantmaking as kind of part of one portfolio. So there has to be that crossover, we think, in terms of total transparency. And it even goes to the level of when we were coming up with our KPIs, our OCIO sat with our chief impact officer and sat with our programmatic team and sat with our comms team to figure out what are the KPIs that are the through line of everything that we do, and sat side by side. This shouldn't seem radical in this because it's not, but sadly, this type of transparency is so rare in the field, as we all know.

Julianna Cagle

And Heather, what about you all?

Heather Barberi

Yeah. I think similar to what Jen said earlier, we've been in a constant evolving state at Grunin. And that evolution really, I think, has been driven by listening, learning from community. We've always considered ourselves, from the start, to be an open and transparent funder. But I think five-ish years ago, when we really started to do much deeper work around our equity, diversity, inclusion, and belonging pillars, that process really opened our eyes because we realized that just saying our door is open didn't mean everyone felt comfortable walking through it. And so, access isn't the same as inclusion. And so, we've been really becoming much more intentional about how we show up in community, whether that's serving on boards, volunteering, building relationships in spaces where people already feel safe. So, that is something we're constantly working on at Grunin to be in community, not just saying, "Anyone can make an appointment," because people didn't feel comfortable.

And then, I think about two-and-a-half years ago, we went through a pretty robust strategic planning process, and we spent almost a year really engaging with community, refreshing our funding priorities and a lot of our work. And we heard very, very direct feedback. Even though we were open, people weren't sure how we made decisions. So they were making assumptions. Jaimie, like what you talked a little bit about earlier, perception becomes reality. Even though internally, we felt like, "Wait, that's not how we make decisions," people were like, "We think it's because you sit on their board or because you know somebody." And so, that was big for us. And to make sure that feedback was honest, we stepped out of the room for a lot of the conversations as well. We thought people would be really honest with us, but sometimes they felt more comfortable sharing when we weren't there. And that built trust and gave us insights we probably wouldn't have gotten otherwise.

We learned that our no-application model, which we thought was removing barriers, actually felt intimidating to some organizations. And so, creating a very clear, transparent process that's still incredibly relational, it kind of demystified how we worked. And so, we're really open about what that process looks like from beginning to end. And Jaimie, you talked about, too, sharing what you fund or don't fund. And we even struggled with a team about whether to put that on our website, what we don't fund. We were worried that it could feel limiting because we do meet with everyone. That's been our president's... That's been something that's been really important to him from the get-go. We meet with everybody, whether they're in our geographic area, whether they're in our funding priority pillars.

But I heard this phrase from the Tzedek Social Justice Fund. They're out of Asheville. I listened in on a panel. And they kept saying, "Clarity is kindness," and it's something that stuck with me. And so, we don't want to waste folks' time. And so, we share the list now, but we still give people the option to book that call. Maybe we can connect them to other funders, maybe we can provide support beyond the check, but it puts the decision in their hands. And if they're really looking for that funding, it allows

them to make that decision. And so, I think for us, transparency isn't just a value on paper. It's that commitment. It's the ongoing learning. It's always adjusting. It's always trying to make sure people feel seen and heard and included. And we try to bake that into everything we do.

Julianna Cagle

I love that. Thank you for sharing those tactical examples. And one thing that I'll just share too, that the Goizueta Foundation has done over the past few years, is we do, every other month, an informational Zoom meeting that is just open to anyone that has interest in the foundation and our strategic priorities and our process. It's run by our Programs team. And it's been really well received, I think, out in the community. It's been well attended. And folks just literally want to be able to come on and hear a little bit more about just that, the practice, the process, see the people who are some of the staff members and decision-makers of the foundation, put names with faces. We show a picture of our board and share a little bit about the life and legacy of our founder, Roberto C. Goizueta. And so, I think that even sort of a low-hanging fruit or light touchpoint in our minds is a big deal for especially some smaller nonprofits that may be new, newer to Atlanta or what have you. So, that's been something fun that we've been working on at the Goizueta Foundation.

But let's shift over to how does being more transparent about your philanthropy strengthen your relationships and build trust with grantees and partners. So, we know that trust is so important in relationship building, as Jen pointed out earlier, and how that really then transitions to good, solid grantmaking. What does that practice look like for you all to build those relationships? And I would also add in here, if you can weave in maybe what this looks like among your staff and your board, because it's not just the relationships with the grantees, it is also internal relationships with coworkers or with board members. And so, we know that trust is not just grantee to foundation, but it really kind of transcends the whole spectrum of our work. Let's see. Heather, let's start with you this time.

Heather Barberi

Sure. I think transparency, it changes the dynamic. I think it changes relationships from transactional to incredibly collaborative. I think when we're open about how we work, it invites that honest dialogue and it gives grantees that ability to feel more comfortable giving feedback and helps us get better. We also extend that openness to our partners, to our consultants, to our board. We bring people together to listen and learn from one another, when there's purpose, when there's action involved, not just to bring people together to bring them together, but I think our grantees, they want action after that. And so we do that listening, learning, and, like, "What are we learning? How do we move that, whether it's into our work or with coalition building?" We do a lot of coalition building work with our partners. I think this work is about being human, and it's about leading with empathy and having the hard conversations when we need to.

And just an example on the funding side, perhaps when funding's coming to an end for an organization. Our director of Thriving Communities, Vicki Fernandez, she talks about conscious uncoupling. And yes, that's popularized by the Chris Martin, Gwyneth Paltrow. But we work really hard to make sure those conversations are clear and compassionate so we don't harm partners. So we work to connect them with other funders. We provide ample time for transition. We provide capacity support, whether that's funding them for doing some planning work or work with a development consultant. So, I think those levels of really deep transparency help to build trust even when you might be in kind of a difficult space with a partner. Because in the end, I think trust is what makes everything else possible in those relationships.

And it's similar to when you're working internally with staff. Again, I talked earlier, we have a really, really open environment at the Grunin Foundation. We're a small team, so there's just five of us on staff. But we have two team meetings a month where we are working together all day, sharing. And it's not all work. We have fun together. We bring joy. Joy is also one of our values, and it really helps us connect and feel good about doing the work. But also with other funders. I think it's so important for us to have transparent conversations and build relationships with other funders. We think it's so important when we can't fund something, how do we do introductions? How do we also... We ask nonprofits to collaborate and break silos all the time. So, how do we hold ourselves to those same standards and come together with other funders and share openly so we're doing work together and collaboratively? So, I think this notion of transparency, Julianna, you talked about, it runs not only with our grantees but board, staff, external partners. It's so critical in how we do the work.

Julianna Cagle

Great. Thank you. And what about Jaimie, you all at Nathan Cummings?

Jaimie Mayer

I would just start off by saying that funders are scary. We don't think of ourselves that way, but my background is in the arts and running nonprofit arts organizations and working with staff who are scared shitless, pardon my French, of funders, and me sitting there as a funder myself saying, "But they're just people," right? But there's this perception that you have to be perfect, that every word matters, every interaction matters, how firm your handshake is matters, what you wear to the meeting matters, do you pick up the check as the nonprofit, right? Everything matters so deeply. And people in the nonprofit space don't feel like they can be transparent with funders and actually state their needs.

And so, one of the things that we do at Cummings, similar to what you were saying, Heather, we try to meet people where they are and figure out how we can help them. It might be through a grant. It might be through a PRI. It might be through our communications. It might be through connections and using our social capital. Whatever it might be, but to kind of craft individual plans, which are different for different program areas and different for... Even the amount of comms that we use in environmental justice versus economic justice is different because of the different superpowers that comms can have in different areas. So, we're always looking at that.

Something else that we're doing in the field, we've been putting together something that we're calling the Transparency Compact, which is trying to get funders to, at the very, very, very baseline, just name transparency as a value and then come up with principles of transparency so that we can all share with each other instead of being behind closed doors and everyone replicating and duplicating and holding things so close to the chest. So, in the next, I'd say, year, but that feels a little... I don't want to set a timeline for ourselves here. In the next couple of years, be on the lookout for a database, and if you want to join the Transparency Compact initiative that the Nathan Cummings Foundation is working on so that we can have a much more collaborative field in sharing everything from our work in the investment space, PRI space to the grant space.

Jen Rainin

Can you just say the question again? Because my brain's in all these places now.

Julianna Cagle

Yeah, yeah. I know. How does being more transparent about your philanthropy strengthen your relationship and build trust with grantees and partners?

Jen Rainin

Okay, thank you. I think that transparency and lots and lots of communication, two-way communication, both with grantees and internally with staff, makes us more responsive to what other folks' needs are on the ground. And that makes us more effective. I feel like an ongoing conversation loop helps everyone show up more fully and helps folks be more willing to let us know how we can make improvements and do better at our jobs. Julianna, I think I had a kind of intense example internally of how that has worked for me that I'd love to share. Love to share.

Julianna Cagle

Yeah, please do. No, please do.

Jen Rainin

Okay.

Julianna Cagle

I think you should.

Jen Rainin

All right. I will. In 2017, the Rainin Foundation became pretty clear that there was a need for explicit equity work within the organization. We'd always been implicitly focused on equity, but we weren't really talking about it specifically in the terms that we are now. So, we started to align around that intention to embed equity into how we work, both with each other as well as with our stakeholders. And we did a big deep dive into understanding our internal culture, built our skills around having difficult conversations and developing a common vocabulary around equity. We created something, a structure called... We call it the Employee Experience Advisory Group. Rolls off the tongue, I know. But it's designed to assist the executive team to focus and deepen our existing culture work so that we can center racial equity and intersectionality as core to our values and include voices from across the organization.

Because yeah, philanthropists are scary, but also supervisors are scary. We just are. I was shocked when I first heard somebody describe me as scary, but apparently I'm terrifying. So, I find that focusing on transparency helps make me less scary and make the work that we do less scary. Anyway, that Employee Experience Advisory Group, EEAG, we meet every other month internally to consider issues that advance our equity learning agenda and help us create the inclusive culture that speaks to our values as an organization. The meetings are open to everybody in the whole team, and they're completely optional. You don't have to go. We put out an agenda in advance. And if there's a topic that you're interested in, you go. We get a lot of participation. Sometimes it's everybody in the staff. It's usually at least 25 people.

In the early years of our DEI work, a big challenge that we faced, and that got much more intense during COVID and then the racial reckoning, was a demand from staff that the foundation provide healing for them. They wanted us to provide a healing space. I see a nod from Jaimie. Maybe other people heard that, too. I know a lot of my peers were hearing something like that. And I really was struggling with it a lot. I was trying to understand what that meant and what our role was and what I could do because I want so much... I care so much about my team. During one of those EEAG meetings, a new staff person, who was a Black woman, directly challenged me saying that the organization was not providing the healing that she needed. And in that moment, I was flooded with feelings. I do not know how to heal

people. I don't know how to do it. And my team, including this woman, they were unable to articulate what healing looked like.

But there was something underneath it that I was trying to figure out. And I was put on the spot in front of... at that moment, it was the entire staff. All 35 folks were there. I was having feelings of fragility and defensiveness. I was bright red. It was sweaty. It was the whole works. It was quite a moment. And in that moment, I took a deep breath and I started to narrate my physical and my emotional response to the whole assembled staff. I talked about the tight feeling in my chest and the heat in my face, and I talked about the feelings of frustration and defeat that I was feeling. And then I talked about my biggest realization that I had during our equity work, which was recognizing my own ignorance and complicity in structural racism. I hadn't had to think about it before, which I understand is how racism works.

So, I talked really earnestly about the deep responsibility that I feel about showing up well for my people and for modeling what I mean when I say that we're a learning organization. And then I ended by vowing to think through the organization's role in helping our staff to heal. And I committed more deeply to my own personal anti-racist work. The staff were... I've never, in all my years of doing this work, never felt that the group was as with me as they were during that speech. They watched me struggling. They watched me struggling for the right words. They watched me facing an issue that I hadn't looked at properly and not glossing over or turning away. They watched me take responsibility for my part and clarify what was not my part. And they watched me be inelegant. And I said, "I'm being inelegant. I know it. And I am working. I'm trying my best."

There was something about being that vulnerable and that honest and that willing to make it worse, potentially, that cemented my staff's trust in me. And it shifted the culture of the organization. You can feel it. It's different now. And the fact that that was then modeled... To be perfectly blunt and transparent, I can't do that every time. It just happened to... I got lucky and I was able to access that part of me that was able to talk it through. And as I spoke, my pulse went down and I felt a little more calm and centered. But it really underscored for me, and I think for everybody there, the power and the importance of being completely transparent, even to the point of saying, "I'm really uncomfortable with this and I don't know how this works. And I think I've screwed up somewhere along the line, maybe in several places." It made a huge difference in our culture. And I think that that then ripples out to how everyone does their work. And we've talked about it since.

Julianna Cagle

That's great. Thank you for sharing that example. And Jen and I spoke about that example last week when she was sharing it. For the staff to see and be a part of that moment, and then the ripple effects, as you just articulated, of the work then with grantee partners, it just sort of set the standard and the tone for what transparency looks like, what vulnerability looks like in relationships. So, thank you for sharing that example.

And I know that we're coming up on time. So I would ask that if you have a question for our panel, if you don't mind just putting it in the chat, we will be monitoring it here. But while we're transitioning to the Q&A, any last kind of words or advice, Jaimie, Heather, Jen, that you all would give to our attendees today?

Jaimie Mayer

Yes. Transparency is suddenly a four-letter word. And I think it just calls on us to be more transparent and to be smarter about how we're being transparent. But in philanthropy, there has been this alarmist culture of scrubbing websites and essentially putting ourselves in even more of an ivory tower than we've ever been in and in this black box. And obviously, we need to stay safe. We need to keep our staff

safe and our grant partners safe. But I think it's shameful that philanthropy is hiding in this moment and not putting itself out in front of our grant partners, who are the actual people who are the most proximate to the issues and the people who have the most to lose.

And so few foundations are helping with legal funds. So few foundations are helping the grant partners get in front. I mean, we had grant partners cry on the phone when we told them that not only are we not leaving racial justice but we're doubling down on our work in racial justice in this moment in time, because so many grantmakers are fleeing that space because it doesn't seem safe in this moment. So, I would urge on us, as a call to action, as a field, that transparency is more important now than ever. Be safe, but to not run the other way and to not abandon your grant partners.

Jen Rainin

Hear, hear. Yeah. I couldn't say it any better. But I will add that the way that the public perceives foundations significantly shapes how people choose to engage with us. And it influences how we're regulated, assuming that that continues to be a thing. I don't know. But when we're transparent, we make the foundation for deeper relationships, for greater alignment, for more meaningful and effective outcomes. And transparency lets us demonstrate that we're listening, learning, and evolving. Yeah. We are in a privileged position, and I think that there's an imperative for us to step up. And by the way, if we all step up and hold each other's hands, we're much harder to push over. So, I got hands. Anybody need them?

Heather Barberi

Plus one, plus one to each of you, or plus a million. And I guess I'll just add, it's hard to add to that because I think that's really where I would love to end on because I think it's so important, but I also just think being transparent doesn't mean being perfect. Somebody said that earlier. It means being real. It means being human. And I think in that realness, there's progress and there's hope and there's joy and there's trust. And I think we just need to keep doing that and not shy away from it and keep standing up for the things that we all know are incredibly important. So, thank you.

Julianna Cagle

Well, thank you all so much for your words of advice and wisdom shared today. One question that has come up a few times in the chat here is, how can you provide transparency if your foundation prefers anonymity? Or if you are a private family or work for a private, more behind-the-scenes family foundation, how do we remain transparent while also kind of toeing that line of anonymity or behind the scenes?

Jen Rainin

It's a great question. Rainin is so not that. So I can't speak from a ton of experience, but my instinct would be to be transparent where you can be. So, in groups like this, in peer groups, show up and be as transparent as possible. Or talk with your board about what they feel comfortable with sharing and what they don't. Maybe you can't be transparent about everything that you do, but there probably are some things that they're okay with.

Jaimie Mayer

There's also a cost to transparency. So, if you value transparency and you also value anonymity, there's got to be a reckoning between the two of those. And you've got to figure out what works for you within that.

Julianna Cagle

What about you all, Heather?

Heather Barberi

Yeah. I think it's a really great question, and there's a little bit of disconnect there. But if it does prefer anonymity, I think it could happen. It just is going to look different. I think it's still about being clear with the people you engage with and still doing the things like outlining your funding priorities and your processes and your timelines and being transparent about expectations and what you fund and what you don't and how you communicate so people aren't left guessing that you have those relationships with. Or it's sharing impact data and lessons through maybe intermediaries or public reports that aren't from you, getting your information out in another way. But it's definitely a little bit of a... It's a challenge, for sure. And again, Jen, we're so not anonymous that it's a challenge, but I know there are folks that... For our foundation, our founders, before they started, they gave anonymously for years. And it wasn't until their son was... and they started the foundation, and he was like, "No, we need to be public about this and bring others along." So, yeah. It's a great question.

Julianna Cagle

And I'll chime in here just because I actually work for... I guess that there is a difference between anonymity and sort of more private. But I work with a family that is pretty private in nature. And the staff really has been hired, I would say, to be the front lines of grantee relationships and partnerships, to be the front lines of building deep and impactful relationships across the community. And so, I think in Atlanta, when folks think of the Goizueta Foundation, they likely think of the staff that are out in the community a lot and are building those deep and trusting relationships with our grantee partners. And that's not because our board doesn't want to necessarily do that, but I think that they just prefer to highlight the work of the foundation and not the work of them as individuals or feel so maybe splashy in the community. And so, toeing that line.

But where the transparency comes in for me as president of the foundation is our board chair and I have to really be in sync, right? We have to have pretty open and honest dialogue and communication about what she may want to attend or show up for or be a part of a conversation versus what she wants the staff to go and really represent the foundation on. And we have those conversations every single Monday and are very direct with where I think that she should be involved and show up, what that kind of power, what that would bring to a specific conversation or moment or event. And so, would just add that there.

Let's see. Another question here before I turn it back over to Britt and the team here. Let's see. What are some lessons learned as it relates to maybe a challenge that you faced? And I know that this is a deep question that y'all might have a long example on, but maybe just a quick example from one or two of you about a challenge that you've experienced. Jen gave a great example earlier, but perhaps a challenge with a relationship and what you've learned from it.

Jaimie Mayer

I would say, for us, this is an internal example, because we value trust and transparency so much with our staff, we really listen to them when they come to us. And we were looking at new office spaces versus... A pretty boring story. Sorry. I'm just going to preface it by saying that. But we were looking at new office spaces versus staying in the space that we had been in for quite some time. And the space that we had been in for quite some time was a typical... There was the windowed office. There was the office in front of the windowed office that had the assistant or the associate or whatever. There's the

meeting room that was, like, the best real estate that was reserved for the board. And our staff came to us and said, "Our space doesn't embody social justice." And if that's a value that you say we care about and is paramount for us, you need to do something about that.

So, we found a new office space with a totally open floor plan, and then COVID happened, and it was a disaster because you couldn't be in a totally open space. And we had sneeze guards everywhere. And it was one of those, like, we course-corrected a little too much in the other direction because we were really having this trust, transparency, open dialogue. And I'd say the same in terms of how our staff works together. If there's total transparency and everyone's welcome to everything, at a certain point, there's so much extra work for everyone that you kind of have to be careful what you wish for and where you want to be. So we kind of went a little bit too far in that direction. And we can laugh about it with our staff now because they agree that we went too far in that direction. And maybe everyone doesn't need to be on every call listening, and everyone doesn't need to be in an open pigpen, like, we're like the stock exchange.

Julianna Cagle

Thank you for sharing. All right, I'm going to turn it back over to Britt, just given the time here. But thank you all so much, panelists, for being a part of the conversation today.

Britt Benavidez

Thanks, Julianna, for guiding us through. Thank you, Jaimie, Jen, and Heather, for being so open and vulnerable and talking about this and giving us really practical examples and takeaways. So, we're just grateful to all of you.

As we get ready to sign off, we have some just quick announcements here. I've launched a feedback poll. We love hearing from you on how today's program went, if you have any lingering questions. We also love to hear if you have any ideas for future programs. So we really take this feedback very seriously.

As you may know, we released our Trends 2025 report this year. It was those graphs at the beginning that anchored today's conversation. We'll make sure that that is in a follow-up resource for you all. We have also released our new Family Giving Life Cycle second edition, a seven-stage framework that captures the major decision points and opportunities across a family's philanthropic journey. So we've refreshed these. We hope that you'll take a look at them. It can all be found on our website.

We have three more fundamentals this year. It's hard to believe we're coming up towards the end of the year. Next month, we will do a deeper dive into a few of the trends that were identified in our report. We hope you'll continue joining us the second Tuesday of the month, except for November has been moved for Veterans Day.

In addition to our webinars and our other programs, we have a range of peer networks for those interested in connecting to colleagues with similar objectives, challenges, roles, and experiences. Julianna co-chairs our Non-family Staff Peer Networks. So please come join her at their next meeting. And again, thank you, everyone, for today's discussion. We will send out a recording along with related resources for this webinar. We'll try and get that out by the end of the week. And please join us on October 14th for our next webinar. Take care. Thanks so much.