



REIMAGINING SOCIAL CHANGE

# Being the Change

NORTHERN CALIFORNIA GRANTMAKERS

JUNE 26<sup>TH</sup> 2018

BOSTON

GENEVA

MUMBAI

SAN FRANCISCO

SEATTLE

WASHINGTON, DC

**FSG.ORG**

# FSG recently released study, *Being the Change*, explores the internal shifts that are needed

## 3 Big Questions

- How are **approaches for creating change**—and related staff roles—evolving?
- What are the **implications** of making staffing changes, including number and roles of staff, as well as organizational and team structures, skillsets, and culture?
- How are foundations **navigating** these organizational changes?

## 6 Funders



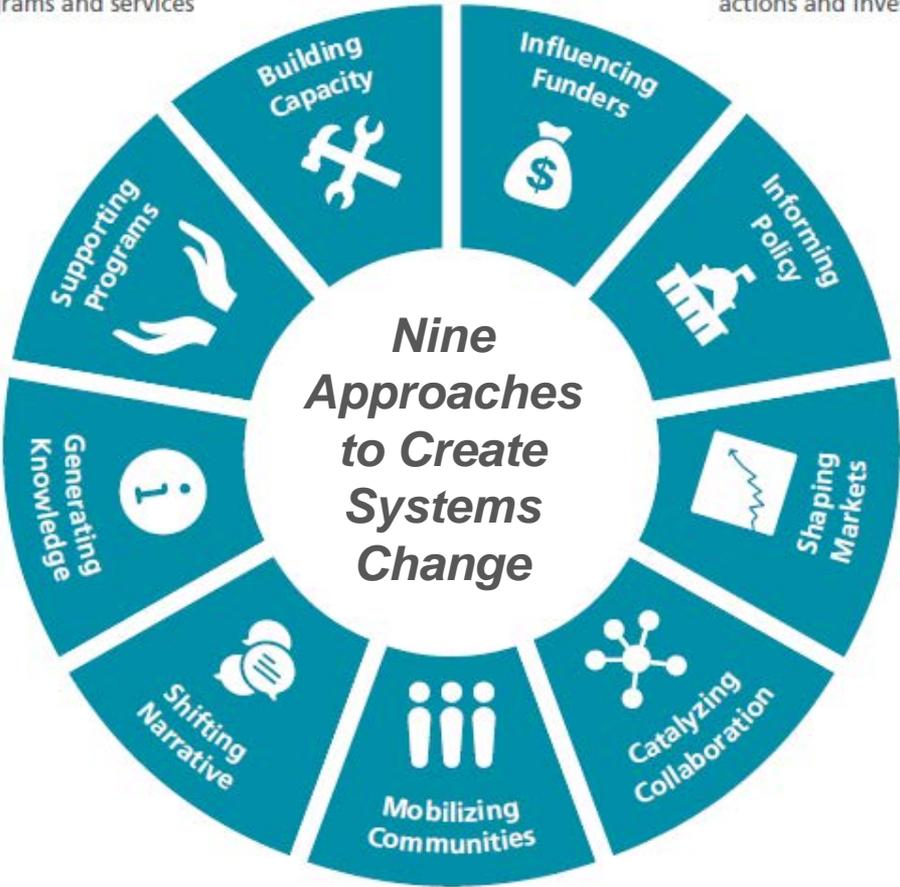
## 114 Interviewees / 58 Orgs



# Foundations working to change systems need a wider array of approaches for creating change

Increase the quality and reach of programs and services

Affect public and private sector actions and investments



Address underlying conditions: mental models, power dynamics, and relationships

# Foundations have adopted 12 internal practices to support their goals to advance systems change

## STAFFING PHILOSOPHY

*Redefining capacity needs by*

1 Viewing staff as impact multipliers, not cost drivers

2 Designing teams based on functions, not formulas

3 Using size-based benchmarking as a compass, not ruler

## STRUCTURE & DESIGN

*Unlocking new sources of value by*

4 Coloring outside the lines of classic philanthropic giving

5 Transforming back-office support into front-line impact

6 Busting silos between issues, people, and teams

## SKILL DEVELOPMENT

*Reconceiving and nurturing talent by*

7 Seeking out and supporting five key mindsets

8 Welcoming and valuing diverse and lived experience

9 Boosting breadth and depth of professional development

## SUPPORTIVE CULTURE

*Fostering openness and authenticity by*

10 Committing to continuous learning and adaptation

11 Attending to power dynamics with partners

12 Mirroring internally what is sought externally

# 1 | Viewing Staff as Impact Multipliers, Not Cost Drivers

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When staff members are given the time, space, and incentives to engage more deeply, they can

1. Develop stronger grants
2. Influence funding beyond their own grants
3. Be more efficient with resources

*“We write a leverage memo every year for our board that includes grants and our field leadership. Maybe we’re only giving away \$16M per year, but we also want to quantify the other ways we have had impact with our staff.”*



IRVING HARRIS  
FOUNDATION

# 2 | Designing Teams Based on Functions, Not Formulas

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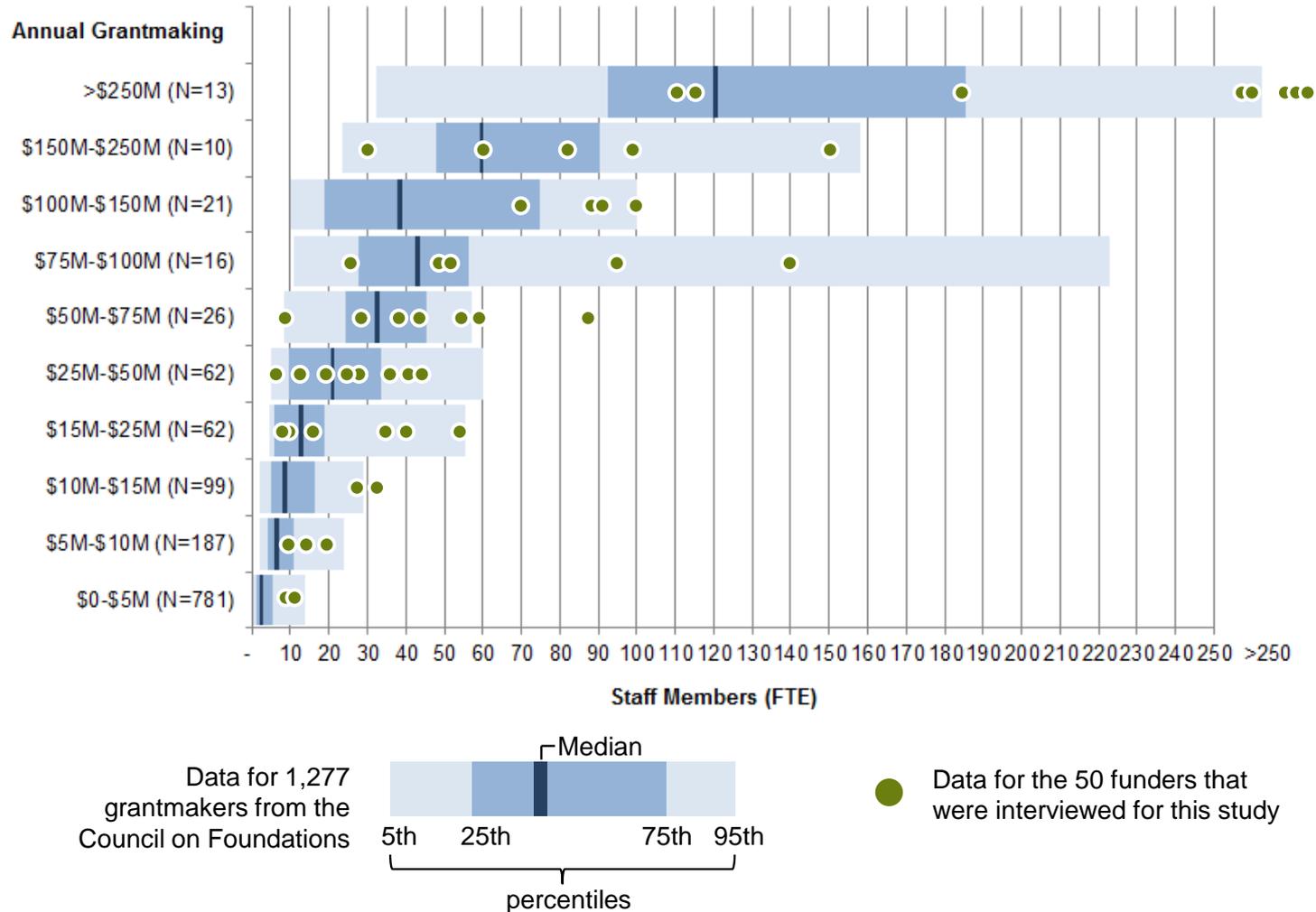
Using a formulaic staffing model may be less effective as program areas might implement different approaches that are more or less financially resource-intensive

- When forming teams, foundations should start by determining which of the approaches for creating change they are using
- This may lead to varying ratios of program area staff numbers per grantmaking dollars across a foundation

*“Staff members across the foundation have totally different responsibilities. Thus we moved away from a formulaic model where everyone has the same-sized grantee or grant portfolio. We now look at the complexity of what they’re managing.”<sup>1</sup>*



# 3 | Using Size-Based Benchmarking as a Compass, Not Ruler



# 4 | Coloring Outside the Lines of Classic Philanthropic Giving

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Allows foundation to create impact in other ways:

- Investing in for-profit organizations and markets
- Influencing decisions of policymakers and voters
- Addressing systemic issues collaboratively and at scale

Encourages foundations to think beyond what might be traditionally viewed as their legal and operating structure

Peers to learn from:



Lumina™  
FOUNDATION



MacArthur  
Foundation

THE  
KRESGE  
FOUNDATION

# 5 | Transforming Back-Office Support into Front-Line Impact

Increases a foundation's ability to deliver on their strategies and provide better support to grantees, for example

- Evaluation building grantee capacity or sharing lessons learning with the field
- Communications supporting narrative change
- Human resources building grantee leadership capacity
- Grants management developing more inclusive and transparent processes
- Finance supporting grantee financial health and management
- Legal crafting legal strategies in support of issues

“...there is greater recognition that administrative and support departments, such as HR, IT, and communications, which were often siloed in the past, are integral to foundations' programmatic work. They are critical to fulfilling mission and achieving impact. This is a major shift from how foundations approached strategic planning and alignment of internal resources ten, even seven years ago.”<sup>1</sup>

**ROCKEFELLER**  
Philanthropy  
Advisors

# 6 | Busting Silos Between Issues, People, and Teams

## Practices

<b>Dedicated cross-team role</b>		<b>All-staff learning retreats</b>	
<b>Specialized communities of practice</b>		<b>All-staff in-person time</b>	
<b>Program Officer (PO) cross-pollination</b>		<b>Performance review incentives</b>	
<b>Common philanthropic approach</b>		<b>Foundation-wide strategic planning</b>	
		<b>Cross-foundation grantmaking</b>	

# 71 Seeking Out and Supporting Five Key Mindsets

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**1. Curiosity and learning**

**2. Humility**

**3. Strategic orientation**

**4. Collaborative approach**

**5. Adaptability**

# 8 | Welcoming and Valuing Diverse and Lived Experience

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Having a diverse and inclusive staff:

- Helps foundations better understand the problems they are working on
- Strengthens the foundation's relationship with beneficiaries and community stakeholders

Staff with lived experience:

- Understand what individuals face in similar circumstances
- Understand the system's barriers, chaotic delivery systems, power dynamic, discriminations, and the stakeholders involved



*“There has been some progress on diversity, but less so on inclusion”<sup>1</sup>*

# 91

## Boosting Breadth and Depth of Professional Development



Image adapted from page 53 of publication

# 101 Committing to Continuous Learning and Adaptation

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Affecting systems means that conditions are constantly shifting and so strategy has to shift as well

- This means it is critical to embrace uncertainty and facilitate continuous learning
- Leadership must support strategy adaptation through its successes and failures

*“We rely on a set of principles to guide our approach, including recognition that social problems are not static...Rather, our work evolves along with the context and environment in which we operate with continuous iteration over time...”<sup>2</sup>*

MacArthur  
Foundation

# 11 | Attending to Power Dynamics with Partners

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Engaging grantees on a level playing field allows foundation to learn more about the grantee and community partners

- Grantees and community partners have invaluable insight about how resources should be directed
- Grantees can provide advice and input on foundation culture and staffing

*“Communities and families are experts in their place; it’s not us coming in with answers, it’s us coming in with resources and a way of looking at things.”<sup>2</sup>*

**T.L.L. TEMPLE FOUNDATION**  
EST 1962  
BUILDING A THRIVING DEEP EAST TEXAS

# 121 Mirroring Internally What Is Sought Externally

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Not mirroring external goals in a foundation's internal policies hinders staff member's ability to take on more direct roles on issues they care about

- Staff may be perceived as inauthentic
- It can create difficulties in developing and maintaining external relationships if foundations are not “walking the walk”

*“We realized if we were trying to make change externally then every change we want to make in the external world we have to make in ourselves.”*

**Lankelly  
Chase**

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# Small Group Discussion Questions

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- Question 1: What resonated for you? What do you have questions about?
- Question 2: What would be the challenge at your institution?
- Question 3: What information or support would you need to bring these ideas home or to implement them?
- Question 4: What is one thing you could do differently after participating in today's program?