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

- Democracy Fund
- Conrad N. Hilton Foundation
- Humanity United
- MacArthur Foundation
- Ewing Marion Kauffman Foundation
- Omidyar Group

### 114 Interviewees / 58 Orgs

- 114 Interviewees in a variety of roles:
  - CEO, ED, President: 27
  - Program: 27
  - HR, People: 16
  - Learning, Eval, Strategy: 15
  - Admin, Ops, Legal: 13
  - Comms: 4
  - Advisory: 12

- 58 Organizations represented:
  - Private Foundation: 27
  - Family Foundation: 10
  - Community Foundation: 7
  - Corporate Foundation: 3
  - Public Foundation: 3
  - Philanthropic Services: 8
Foundations working to change systems need a wider array of approaches for creating change

Nine Approaches to Create Systems Change

- Increase the quality and reach of programs and services
- Building Capacity
- Influencing Funders
- Informing Policy
- Shaping Markets
- Generating Knowledge
- Shifting Narrative
- Mobilizing Communities
- Catalyzing Collaboration

Address underlying conditions: mental models, power dynamics, and relationships
Foundations have adopted 12 internal practices to support their goals to advance systems change

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<tr>
<th>STAFFING PHILOSOPHY</th>
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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
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
7. Seeking out and supporting five key mindsets
8. Welcoming and valuing diverse and lived experience
9. Boosting breadth and depth of professional development
10. Committing to continuous learning and adaptation
11. Attending to power dynamics with partners
12. Mirroring internally what is sought externally
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.”

Phyllis Glink, Executive Director, Irving Harris Foundation
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.”¹

¹John Kobara, Executive Vice President & COO, California Community Foundation
Using Size-Based Benchmarking as a Compass, Not Ruler

Data for 1,277 grantmakers from the Council on Foundations

Data for the 50 funders that were interviewed for this study
Coloring Outside the Lines of Classic Philanthropic Giving

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
- Schott Foundation for Public Education
- MacArthur Foundation
- Omidyar Group
- Kresge Foundation
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.”

1. Olga Tarasov, Director of Knowledge Development, Rockefeller Philanthropy Advisors
**Busting Silos Between Issues, People, and Teams**

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<td>Dedicated cross-team role</td>
<td>All-staff learning</td>
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<td>Specialized communities of practice</td>
<td>retreats</td>
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<td>Program Officer (PO) cross-pollination</td>
<td>All-staff in-person</td>
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<td>Common philanthropic approach</td>
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Seeking Out and Supporting Five Key Mindsets

1. Curiosity and learning

2. Humility

3. Strategic orientation

4. Collaborative approach

5. Adaptability
Welcoming and Valuing Diverse and Lived Experience

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”¹

¹Vincent Robinson, the Founder and Managing Partner of The 360 Group
Boosting Breadth and Depth of Professional Development

Diagram can be found on page 53 of publication
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…”²
Attending to Power Dynamics with Partners

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.”²
Mirroring Internally
What Is Sought Externally

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.”

1. Alice Evans, Director, Systems Change, Lankelly Chase
2. John Cawley, Vice President, J.W. McConnell Family Foundation
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Small Group Discussion Questions

• 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?