

Activating Donors for Change

Five Themes from Community Foundations

By Lori Bartczak, Community Wealth Partners

Community foundations are one of the most powerful levers for change at the local level.

It's an understatement to say we've been thinking about this a lot. Since 2020, we've researched, written, and worked with community foundations on the topic of influencing donors to move more resources to BIPOC-led and -serving nonprofits. Alongside [ideas42](#) and the [Stanford Center on Philanthropy and Civil Society](#), we published research about [donors' funding behaviors](#) and [community foundations' efforts to adopt equitable practices](#). With funding from the Fidelity Charitable® Catalyst Fund and behavioral science support from ideas42, we facilitated peer learning cohorts for community foundations working to advance racial equity and direct more resources to BIPOC-led and BIPOC-serving nonprofits. The cohorts included 18 community foundations, located all over the country, and ranging in size from less than \$300,000 to more than \$1 billion in assets.

To briefly summarize what we've learned, donors tend to give to organizations and issues they have a personal connection to, and those organizations tend to be large, white-led nonprofits. In response to this,

many community foundations see an opportunity to connect donors to the organizations that are making a difference on critical issues in the community. Rather than serving as impartial managers of donor-advised funds, they are taking a more proactive role: they're helping donors understand the inequities in their community, raising their awareness of organizations advancing powerful solutions, and inviting donors to give to more organizations led by the communities most impacted by the work.

After all this work, we're taking a step back to reflect on it all. We've seen the need, the potential, and the impact of community foundations connecting donors to organizations addressing the greatest needs in the community. We've also seen the challenges that come with it.

This article highlights five themes we've seen across community foundations making progress on this goal. The themes are neither linear nor distinct: like all complex work, they overlap and loop back around and sometimes get all tangled up.

1. Do the internal work

You've probably heard this before, but it's important enough to reiterate. While your goal might be to increase equity in your community, it's critical to take time to examine and shift mindsets, practices, and competencies inside your foundation. Internal equity work can include many things, such as:

- **Get clear on what you mean when you talk about equity, particularly in your community, and why it matters to your foundation.** E.g., What are the greatest disparities in our community? What is at the root of them? What role does race play in community members' experiences and life outcomes?
- **Build team members' skills at having conversations about race and equity with donors, community members, and one another.** E.g., How can we talk about inequities without responding defensively? How can we bring donors along in our understanding of what it will take to achieve our vision for an equitable community?
- **Build board members' competencies at understanding and talking about race and equity.** E.g., How aligned are our board and staff in thinking about equity? How might our approach need to differ in bringing the board along in our internal equity work?
- **Understand characteristics of [white dominant culture](#), and practice other ways of working.** E.g., How often do we strive for perfection? How can we build our skills at recovering from mistakes instead?

Many community foundations have used a strategic planning process as an opportunity to do internal work, develop plans for how to deepen it over the next few years, and create shared intention and commitment to the work.

But internal equity work is never complete, so don't fall into the trap of waiting for "the right time" or spending years in discussion without action.

"We decided to jump right in and try stand-alone initiatives and approaches to advancing equity in our work," said Tara Nadel, vice president of marketing and events at the Community Foundation for Northern Virginia. "While the ultimate goal is to do this strategically with full buy-in, the idea of starting small and piloting ideas and approaches is not bad. It's better to do something than sit there and keep having conversations over and over without making any changes. We could have had analysis paralysis, but we didn't."

To avoid analysis paralysis, you might take cues from our partners at ideas42 through their publications [Behavior and Charitable Giving](#), [Best of Intentions: Using Behavioral Design to Unlock Charitable Giving](#), and their [literature review on how language and framing](#) may affect donor support for organizations working on equity. They brought this behavioral science expertise to a series of community foundation cohorts we facilitated in 2021 and 2022. They helped cohort members embrace a spirit of experimentation, reflection, and iteration and encouraged participants to take bite-sized steps when the work seemed overwhelming.



Read more about how other community foundations formed points of view on racial equity and made strategic shifts toward it on pages 4-7 of our report [Moving Toward Equitable Funding Practices: Findings from Research on Community Foundation Practices](#).

2. Align on a clear point of view

One key piece of internal work is getting clear on why equity is important for your foundation. The clearer your team is, the better equipped they'll be to articulate it to donors and community members.

Work through questions in teams and across your foundation:

- What is the impact your foundation wants to have in the community? What structural barriers are preventing that?
- What values are core to your foundation? Which ones feel true right now, and which ones feel aspirational?
- As you look at the impact you want to have and the values you've chosen, what points of view does your foundation hold? To what extent are they shared across teams?
- What role does your foundation want to play in the community? Where are you well positioned to lead vs. contribute to meaningful change?

Your responses to these questions will change over time. But when your team is aligned and clear on your messages and points of view, you can then figure out how to frame and tailor those messages to

different audiences and contexts. This includes how you approach one-on-one conversations with donors as well as when you speak publicly in the community.

Rose Community Foundation in Denver has found that publicly sharing their points of view on controversial issues or current events can result in more engagement from some donors as well as resistance from others.

"Whenever our organization speaks out on hot-button issues, we expect to see some tension," said Katie Peshek, director of communications and outreach at Rose. "But we also see a tremendous outpouring of generosity from individuals who reach out to say, 'How can I help?'"

The foundation tries to speak out only on issues that are clearly connected to its values. When speaking with donors, staff explicitly draw that throughline for them.

"Rose is a Jewish-founded organization, and a central teaching of Judaism is to welcome the stranger," said Sarah Indyk, chief philanthropy officer. "We're engaged in work right now to support new immigrants arriving from Central and South America. To us, this feels authentic to our values."



Explore how the Pittsburgh Community Foundation [worked to align perspectives and integrate work](#) between program and donor services teams.



Many resources can help you tailor messages to different communities, including Hattaway's [Spire](#) and FrameWorks Institute's [library of resources](#).

3. Act as a bridge builder in your community

Community foundations can help bridge gaps between parts of the community that don't normally interact with one another. They can do this in a couple of ways:

Build bridges between donors and community-based organizations.

Many donors and community-based organizations may not know about, or have relationships with, one another. To facilitate a connection, the Pittsburgh Foundation gives donors a list of grantees, organized by focus area, and invites them to join the foundation in funding those grantees or to help close the gaps when the foundation can't fund the full amount a grantee requested. (*Read more details in [this case study](#).)* This is supported by [emerging research from ideas42](#) that when giving opportunities are curated, especially by a trusted source, this can increase the likelihood that donors will not only give but give flexible funding.

Rose Community Foundation connects donors to organizations in a few ways: It hosts donor learning programs in which it invites grantee speakers working in particular issue areas to share their expertise with donors. It also invites donors to join the foundation in funding its grantees. Inspired by an idea from

ideas42, the foundation has started sending out a personalized mid-year email that provides donors with a snapshot of their grantmaking that year and an invitation to make a grant. After sending the snapshot email in July of 2022 and 2023, the foundation saw an increase in August and September of those years in the number of grants given as well as in dollars given.

Build bridges across difference in your community.

The Community Foundation of Greater Birmingham brings together community members across differences to build connections and understanding. Through a field of interest fund called the Instruments of Hope Unity Fund, the foundation convened an interfaith council of local faith leaders to connect across and celebrate different faiths. It is also supporting a year-long healing circle that brings a diverse group of community members together to learn about one another and build relationships. Through its Woven Together events, the foundation is convening a series of "courageous conversations" between people of different beliefs, backgrounds, and experiences.

The Community Foundation for Northern Virginia [hosts book circles](#) in which it invites community members to read a book, invites the authors to speak, and facilitates discussions on the topic. The book selected in 2023 was Mónica Guzmán's *I Never Thought of It That Way: How to Have Fearlessly Curious Conversations in Dangerously Divided Times*, and the 2024 book will be David

Brooks' *How to Know a Person: The Art of Seeing Others Deeply and Being Deeply Seen*. The foundation has also been working to foster more trust and relationships across the community in other ways, such as their recent [Shape of the Region conference](#) which they co-hosted alongside 19 regional partners to discuss how to build trust and community.

4. Meet donors where they are and engage them in your vision

When you're clear on your points of view, you can figure out how and when to engage donors in conversations about them. The community foundations we've worked with have shared some common insights:

- **Speak with authenticity and vulnerability.** This can help build credibility and trust with donors. For example, Jen Southard, vice president of donor services at Maine Community Foundation said, "Being honest with our donors that the internal work we've been doing has been uncomfortable for us too has helped us open vulnerable conversations with some of our donors."
- **Invest in relationships.** As Michelle McMurray of the Pittsburgh Foundation said, "Change happens through relationships, at the speed of trust. If we don't trust each other, we're not changing anything."
- **Leverage peer relationships.** Donors are greatly influenced by peers and want to connect with them. A peer's words can be more compelling and motivating than

those of foundation staff. The Community Foundation of Greater Birmingham will sometimes invite a board member to join a conversation with a donor.

- **Use data and frameworks.** Many community foundations share data that helps donors understand the racial disparities that exist, context on why they exist, as well as frameworks that codify the changes the foundation is working toward.
- **Ground engagement with donors in patience and love.** As Community Foundation of Greater Birmingham board member Brian Hamilton said, dismantling inequitable systems is generational work. It takes time.

In order to bring donors into your vision, you have to rethink how you talk with donors, learn what kind of language resonates with them, and ground in your shared values.

"Our commitment to equity and inclusion has stayed consistent," said Christopher Nanni, president and CEO of the Community Foundation of Greater

Birmingham. “Our shift has been about our way of talking about it.”

Some community foundations have utilized tools from [Loretta Ross’s work](#) on “calling in” instead of “calling out.” Some also utilize Ross’s [circles of influence framework](#), which argues there are different ways of engaging people who

share 90 percent of your worldview, those who share 75 percent but have enough common ground to move forward together, 50-percenters who share your values but might have a different vision they’re working toward, and 25-percenters who may not share your values nor your vision but care about being a good person.

5. Pay attention to who you are and aren’t funding

In order to help donors connect with organizations that are led by and closest to the people they’re trying to support, you first need to have trusting relationships with those organizations. This does not happen overnight. It requires deep listening, humility, willingness to sit through discomfort, and a commitment to using what you learn from the community to evolve your work. Some foundations have found that their programmatic funding historically has not included important parts of the community, and they have had to work to build new relationships as a result. The National Committee for Responsive Philanthropy has [published research and recommendations](#) on the racial disparities in who benefits from community foundation funding. To help your foundation reflect on who you’re funding and who isn’t receiving funding, consider the following questions:

- Do you collect and disaggregate data on outcomes in the community? Do you collect and disaggregate data on grantees? To what extent do grantees represent the communities you’re trying to reach?

- How might you build relationships with more community-based, community-led organizations?
- Does your pool of grantees include organizations that are closest to the issues in the community? If not, how might you shift that with care?

Since 2012, the Community Foundation for Northern Virginia has turned over funding decisions for its Community Investment Funds to a group of community members. The [Community Investment Funds](#) account for 85 percent of the foundation’s discretionary spending. This group – the community review committee – is made up of more than 80 community members who collectively review each funding application and decide by consensus on a set of grantees to submit to the board for approval. Recently, the foundation has worked to ensure the committee better reflects the community. For example, it recently ran the selection process for their Latino Community Engagement Fund in Spanish in order to allow participation by more Spanish-speaking Latinos. The foundation also began awarding grants at different levels based on an organization’s budget, so that smaller organizations were not competing with larger, well-resourced nonprofits.

“That was one of the success stories that came out of our participation in the Community Wealth Partners cohort – becoming more aware of community

needs and community voice,” said Sari Raskin, the foundation’s vice president of grants and community leadership.



Read more about how other community foundations have changed their grantmaking practices on pages 7-14 of our report [Moving Toward Equitable Funding Practices: Findings from Research on Community Foundation Practices](#).

Many community foundations may not realize the power they have to bring donors into their vision for change, and it certainly takes a lot of work and dedication to figure out how to harness that collective power. But many community foundations are trying and making progress in directing more resources to BIPOC-led and BIPOC-serving nonprofits.

For many, that work is rooted in strong, trusting relationships – with donors, with community-based organizations, and across teams in the foundation.

“We have found that while information is helpful, people are changed when they make meaningful connections,” said Gus Heard-Hughes of the Community Foundation of Greater Birmingham. “The way of out of division in our community is through relationships.”



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Who We Are

Community Wealth Partners is a social impact consulting firm guided by a vision of a world where all people have what they need to fully live into their potential, particularly those who are kept furthest from resources and power.

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