

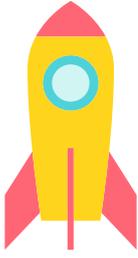
Accelerating Equitable Grantmaking:

Seizing the Moment
to Norm Multiyear,
Flexible Funding



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Over the course of the pandemic, more than 60 percent of foundations loosened restrictions and lightened reporting for grants. Now is the time to normalize these good practices across the sector, because flexible, multiyear grants, anchored in trust, are not only the right way to build grantee partnerships but also the smart way for grantmakers to create more impact, advance equity, and strengthen grantee organizations for the long run, as strong evaluations show.

In October–November 2021 MilwayPLUS interviewed, surveyed, and conducted focus groups with 30 global funders and nonprofits that had significantly increased their percentage of multiyear, flexible funding over the past decade. We surfaced **five common barriers** to making the shift and practical ways that boards, CEOs, and program officers have broken through, which nonprofits felt helped to share power. Moreover, we also discovered **five effective accelerators** of change that both funders and grantees **rated more significant than the barriers** and could speed the transition. Among the accelerators was the adoption of an **equity lens on grantmaking**. (Deep link to survey data, end of toolkit, showing higher ratings for accelerators than barriers.)



To help funders and nonprofits harness this positive momentum for change, we offer this tool kit of tactics, resources, examples, and starting points. We seek to equip trustees, CEOs, program officers, and grantees themselves to overcome **board biases** and other barriers, to accelerate the shift to multiyear, flexible funding, and to embrace practices that create the greatest impact and strongest partnerships with their grantees. Consider that:

- 1. The problem has been studied and confirmed.** More than [three decades of evidence](#) building have documented a philanthropic and government funding pattern of [starving grantees' core operations](#), which sustain the very programs that funders support. This occurs because grants have arbitrarily low overhead rates, or other restrictions, and short cycles, which don't allow a nonprofit to add needed staff positions. Advocacy for change by philanthropic support organizations abounds through initiatives including The Bridgespan Group's [Pay-What-It-Takes, Trust-Based Philanthropy Project](#), Philanthropy California's [Full Cost Project](#), the Council on Foundation's [COVID Pledge](#) and GEO's focus on [flexible and reliable](#) funding. Meanwhile, a number of funders are defining new approaches, such as Ford Foundation's [Building Institutions and Networks \(BUILD\)](#), and New Profit's [Build Investments](#). They all aim to create more equitable grantmaking.
- 2. Advocacy for change has heated up.** [Nonprofits and funders](#) have increasingly spoken out to [influence debate and practice](#) as global crises, which are threatening the climate, health, democracy, and our very social fabric, call for grants that sustain movements and give nonprofit leaders flexibility as priorities shift. In 2020, during the COVID-19 pandemic, more than 800 funders [pledged](#) to unrestrict their grants and reduce reporting and other requirements, a pivot that recent Center for Effective Philanthropy (CEP) research found most funders intend to maintain. We hope this tool kit will help them stick. A smaller number of funders grew or initiated multiyear funding, and we hope this tool kit will grow adopters.
- 3. The time is now to seize the moment.** Funders' endowments are flush, and the call to more equitable grantmaking clarion. In the words of Dr. Robert Ross, president of The California Endowment, "The markets have been kind to philanthropy ... this should be the moment to translate that into multiyear funding ... three years and up ought to be the target. Five years is ideal." And in the words of nonprofit leader Melissa Fourie of the Centre for Environmental Rights in South Africa: "Institutional work around diversity and transformation ... is not work that you do in one year. It's always work that requires multiyear efforts."

What's Accelerating Change?

Five Forces for Multiyear, Flexible Funding That Strengthen Organizations and Share Power

- 1. Value clarification:** This accelerator engages funder staff in an exercise to clarify their theory of change and the values that flow from it, and to root all grantmaking practice in those values. These values typically include words like trust, humility, inclusiveness, responsiveness, and auger for practices that create deep partnership with grantees, who do the work. Grantees say the best way to foster such partnerships is to fund them over time periods that map to the pace of change and with the flexibility to strengthen their organizations for the challenge.
- 2. Grantee feedback/initiative:** Funders who request regular feedback from grantees say the answers they receive strengthen boardroom and staff advocacy for change. At the same time, grantees who initiate meetings to verse funders on their multiyear strategies have built funders' trust and broadened their thinking on timelines.
- 3. Grantmaker equity lens:** When grantmakers commit to redistribute power and resources and address historic underfunding of historically marginalized leaders (by race, ethnicity, caste, or gender), they encounter a need to offer them multiyear, flexible funding to fill talent gaps, strengthen underfunded organizations, and provide financial runway to plan long-term strategies to repair injustice.
- 4. Use of crises to galvanize:** Crises like COVID-19, racial reckoning, and political threats to women's and immigrants' rights create a burning platform for change that prompts funders to unrestrict grants, increase funding flows, and maintain flexible funding to build resilience for future challenges to advancing justice.
- 5. Group influence by peers or sector:** Funders' public commitments to good practice like [the Pledge](#), funder collaboratives, participatory community funds, and nonprofit advocacy networks like [Black Lives Matter](#) all wield group influence on philanthropic approaches. Meanwhile, individual funder-innovators, like [MacKenzie Scott](#), influence standards for groups of funders.

What's Getting in Funders' Way?

Five Significant Barriers to Multiyear, Flexible Funding That Funders Need to Break Through

- 1. Budget policy:** Grantees and funder staff point to budget policy barriers including fixed overhead rates, annual budgeting that impedes multiyear commitments, and pauses to refresh budget strategy, which disrupt grantee rhythms.
- 2. Board bias for control:** Funder CEOs and staff speak of their board's bias for control, including avoiding risk (vs. embracing risk capital), holding up a paradigm of grant success/failure vs. a paradigm of learning, and focusing on individual grantee results instead of portfolio results that map to the funders' mission.
- 3. Imbalance of power:** Grantees feel power imbalances keenly, including when funders rely on staff more than grantees to understand a social impact field, when they create space for funder questions but not grantee feedback, or when they evaluate grantees without asking them to evaluate program staff. Most painfully, funders can pause programs for review when new leadership arrives, without considering the impact on grantee funding cycles. Flexible funding conveys trust, and multiyear funding, say grantees, gives them years between asks to interact as partners and raise issues of power sharing.
- 4. Beliefs about accountability:** Approaches to accountability that block trust-based funding include reporting requirements that prescribe impact measures vs. eliciting suggestions from grantees, and that structure grants around tight, programmatic goals to facilitate measuring them. Such grant-making may yield a specific short-term result, unsustainable without the long-term flexible funding that supports and strengthens grantee core operations.
- 5. Bureaucratic roles and systems:** This includes staff roles that add work for grantees instead of shouldering it or, worse, create check-the-box tasks and layers of review that add work for all and convey distrust. And it includes grant management systems that capture data but not relationships (conversations, questions, and feedback).

No. 1 Accelerator: Getting Clear on Values

The motivator:

We heard this again and again: Grantmakers that plumbed their values gained new perspectives on their grant practices. Funders that valued:

- Proliferating a proven intervention or scaling a research-based model
- Strengthening organizations as a field that tackle a threat, like disease or climate change
- Raising up leaders in underserved communities to advocate for local needs

... found a natural path changing grant practices to fund the years it takes to roll out a model, influence a norm, and develop advocates. They also saw the benefits of providing flexibility for grantees to apply the funding where most needed.

Funder action that nonprofits support:

1. **Embark on a values discussion across board and staff.** Establish a working group or invite a third party, such as Trust-Based Philanthropy, to help you explore philanthropic values and articulate yours.

Who's done it? [Overdeck Family Foundation](#)
[Harris and Eliza Kempner Fund](#)
[Rockefeller Brothers Fund](#)

2. **Discuss how to express agreed values through grantmaking practice and make changes to do so.**

Who's done it? [The California Endowment](#)
[William and Flora Hewlett Foundation](#)

3. **Ask for feedback from grantees on how your values come across.** As part of an ongoing funder-grantee dialogue, create means for grantees to provide feedback on their felt experience of your values and suggest any changes to grantmaking processes that could better channel them.

Who's done it? [IMC Foundation](#)
[Peter and Elizabeth Tower Foundation](#)
[William and Flora Hewlett Foundation](#)

What grantmakers say:

“We needed to do values work and affirmed that equity, grassroots inclusiveness, and responsiveness were part of our values. So we took elements from the Pledge (during COVID) into consideration for how to fund grants. We unrestricted all grants and streamlined reporting.”

Lauren Scott, ED,
Harris and Eliza Kempner Fund

“Respecting and acknowledging the contributions of others is one of our values. We put our partners at the center, and we work in service of our partners, and that leads to multiyear, general operating support.”

Adriana Craciun, Senior Adviser of Organisational Development and Capacity Building, Oak Foundation (Switzerland)

“What’s really important to me is shifting from viewing our grantee base as a pile of 500 grantees to viewing them as an ecosystem for change.”

Dr. Robert Ross, President,
The California Endowment

“We really do believe our grantees are our partners, in that without them we cannot achieve our mission. We believe they are experts in what they do, and that, if they identify ways we can help them ... they know what they are doing.”

Tracy Sawicki, ED,
Peter and Elizabeth Tower Foundation

“We care about social justice. If an organization has an approach that aims to achieve systemic change in a situation of injustice, we fund it multiyear.”

Audrey Elster, ED,
Raith Foundation (South Africa)

“Our ethos has been we have to build good organizations, not just fund good programs, and it’s kept us on track to fund non-program costs.”

Vidya Shah, Executive Chair,
EdelGive Foundation (India)

“We frame most of our relationships with an assumption that they’re probably going to be long term, or at least have the potential to be long term. That sets the table for the kind of trust that we need.”

John Taylor, President,
Wellspring Philanthropic Fund

“Change takes time; there are going to be two steps forward, three steps back, and one off to the side. Understanding that will lead you to certain assumptions about how to fund, with what kind of funding, over what period of time. When our board had to clarify our theory of change, it really cemented fundamental approaches that undergird our work, including long-term funding, flexible support, and other kinds of wraparound support.”

Nicky McIntyre, CEO,
Foundation for a Just Society

“Some funders are hesitant to provide multiyear funding to something new, but we actually do the opposite, because we need new ideas and we need new approaches and strategies. We need to fund those folks who are doing this on the ground, in their homes, who have an idea. That just isn’t funded enough.”

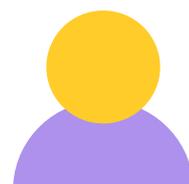
Sarah Walczyk, ED,
Satterberg Foundation

“We spend a lot of our time in our board and staff conversations trying to reframe what we mean by risk, in terms of opportunities and points of leverage for high impact. What’s the risk of not investing in organizations’ missions? We have more clarity at this point about our theory of change, about how the ecosystem approach fits into our longer-term goals of improving health status and thriving and well-being.”

Hanh Cae Yu, Chief Learning Officer,
The California Endowment

“It’s about really understanding what the right role of the board is. The key is to lift the board to the strategic level so that they’re really focused on mission: Are we collectively, and in an aggregate fashion, delivering on mission? Not looking at each individual grant, or each grantee, and deciding, Well, this should be a two-year grant and this one should be a one-year grant. That’s where we get lost.”

Stephen Heintz, President,
Rockefeller Brothers Fund



“Foundations are in a unique position to be social venture capital.”

**Nancy Rauch Douzinas, President,
Rauch Foundation**

“We’re giving more general operating support, and we also have a whole portfolio of capacity-building support. We fund communications positions, and we fund fundraising positions, for example. This is one way foundations can be supportive if they’re not quite ready to move into completely unrestricted funding.”

**Tracy Sawicki, ED, Peter and Elizabeth
Tower Foundation**

“We have a board that is very involved in the core business, so we have to find ways to be respectful of that and realize that they’re speaking a different language in the business world and they’re focusing on different things. We look for ties between the work of the foundation and the business, and one way is taking the values that are important in our core business and applying them to the foundation. In our business, we give people a lot of responsibility and trust, and so we’ve reinforced that as a principle in our philanthropic work as well. ... One of the drivers of why we supported Room to Read in Tanzania was that they were at an earlier stage in their work there. We chose that because we felt it was a higher risk reward there that appealed to our values.”

**Lisa Wiersma, ED,
IMC Chicago Charitable Foundation**

“If you know your board, you need to make the connections for them. You need to ask yourself, ‘How do I make them understand?’ They’re all highly functional in their own fields, so clearly they also want to do grantmaking well. So how do I help them understand that they’ll make more of an impact if they do core funding if they trust the partners who are the experts?”

**Audrey Elster, ED,
Raith Foundation (South Africa)**

What grantees flag:

“Funders should see nonprofits as filled with human beings, not just stakeholder objectives or outcomes of the work. These are hardworking people who need to plan for their lives and know that they’re going to have a job next year, be able to support their families, and all the other things that funders probably all care about a lot from a social justice perspective, but there’s often a disconnect in funders being more focused on the work than the people in the organization doing the work.”

**Andrew Kassoy, CEO,
B Lab**

“People see our fellows and they are willing to fund them, but they don’t really want to invest in the work that it took to find them and support them to get to that stage. They’re less interested in funding the systems change work, and that is what needs to happen.”

**Joanna Helou, Chief of Staff,
Echoing Green**

“Every seven-figure gift that we’ve gotten has been from people who have a [clear] understanding of tech and what that means is possible for scale.”

**Sixto Cancel, CEO,
Think of Us**

“If I’m running a campaign on the environment, for example, I will not achieve it in one year. Environmental gains can take five or more years. I’m asking for enough time to be able to document some good results.”

**Julius Mukunda, ED,
CSBAG (Uganda)**

Getting Started:

Boards:

Discuss the values and goals that guide your foundation's grantmaking. How can you structure your grantmaking to best embody those values and support those goals? Read the [Axis of Ideology](#) and discuss the approaches used and how effective they were.

CEOs:

If your foundation already has a set of core values, suggest that the board discuss them in the next board meeting. If you do not already have a set of core values, begin a process to develop them.

Programme officers:

When preparing grant paperwork for CEO and board review, use core values to make the case for more unrestricted funding and longer-term funding.

Grantees:

Ask about the funder's values in your earliest conversations with them.

Additional Resources:

- ["Time to Reboot Grantmaking,"](#) SSIR article by Ford and Bridgespan on how the Ford Foundation shifted its funding to better support grantee needs
- ["Resetting the Grantor-Grantee Relationship,"](#) SSIR article on how changes in behavior and mindset can strengthen grantor-grantee relationships
- ["Axis of Ideology: Conservative Foundations and Public Policy,"](#) National Committee for Responsive Philanthropy article on effective practices used by conservative foundations

Data Highlights:

- Funders rated board values as the number one most influential factor in shifting toward more flexible funding and more unrestricted funding (Accelerating Equitable Grantmaking Survey, MilwayPLUS, November 2021, n=30).

No. 2 Accelerator: Grantee Feedback/Initiative

The motivator:

Funders credited grantee feedback and initiative as the second most powerful motivator of changes in grant practice, something our survey showed nonprofits leaders weren't sure of (they credited funder peer feedback with greater clout). But funder CEOs told us that candor from grantees on what it really takes to achieve impact—flexibility to apply funding to core support and programs and timelines that account for the years it takes to change laws, social norms, and inequality in education or health—gave staff a case to make to their board. Grantee testimonials in board meetings can be galvanizing, as can grantees' multiyear strategies that trace out the stages of investment and impact.

Funder action that nonprofits support:

1. **Make grantee feedback a part of every board meeting and retreat**, whether via a [grantee perception report](#) or other survey results, grantee guest speakers, or program officer presentations. Invite a grantee-leader to your next board-staff retreat to discuss grant practices that lead to impact. Create space for both a wake-up call on how grant restrictions shortchange impact and for discussion of alternate approaches that keep funder and grantee accountable to each other.

Who's doing it: [Satterberg Foundation](#)
[Oak Foundation](#)

2. **Offer planning grants to help grantees create multiyear plans**. Ask grantees about their multiyear plans, and if they don't have one yet, support their creation.

Who's doing it: [Ford Foundation](#)
[William and Flora Hewlett Foundation](#)

3. **Move beyond feedback to input** by including grantee voice in strategy development, establishing advisory committees, nominating nonprofit leaders for board seats, and exploring participatory grantmaking.

Who's done it? [Peter and Elizabeth Tower Foundation](#)

What grantmakers say:

“We all had a moment of truth at an in-person event with staff and trustees in 2016. Vu Le spoke and used the [analogy of baking a cake](#)—if you want a fully baked cake, you can’t only pay for the ingredients. You also have to pay for electricity, the bake staff, and all the other costs beyond ingredients. But, this is not always the case in philanthropic funding. That was a light bulb moment. Before that, we had a hard and fast rule of 15% overhead. But we saw that it was an arbitrary number. Maybe you are living in a country with high electricity costs ...”

**Medina Haeri, Programme Officer,
Issues Affecting Women Programme,
Oak Foundation (Switzerland)**

“When you ask nonprofits what they’re able to achieve with eight- or 10-year funding, it’s not, ‘Well, we’re able to provide more sandwiches.’ It’s, ‘We are able to influence policy so we have access to food.’ That’s feedback that tells us this is a sector where we can take risks. Identifying the risk feels good for the board and to me.”

**Sarah Walczyk, ED,
Satterberg Foundation**

“Even when we funded specific programs with a specific reporting format, some of our grantees would also still share the whole picture [of their work]. They taught us that if we don’t see the totality, it limits how we view our own contribution. So no matter what the donor asks you for, give them what they ask for but, in addition, give them what you think is the best picture of what you’re doing.”

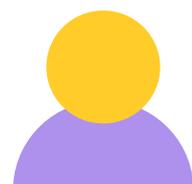
**Audrey Elster, ED,
Raith Foundation (South Africa)**

“When you talk about your strategy, talk about what it takes to implement that strategy. Talk about the costs that come with implementing that strategy. My advice to organizations is to build those costs into projects and make a case for them. You have to do that because some of us [program officers] are not always thinking about those things. It is also possible that a particular program officer lacks experience in the civil society sector, has never worked in a nonprofit, and does not know what it takes. I don’t want to put the pressure on grantee partners, because funders should be better at understanding, but sometimes all it takes is to ask for something.”

**Adriana Craciun, Senior Adviser of
Organisational Development and
Capacity Building,
Oak Foundation (Switzerland)**

“When grantees are able to give a vision of what they will be doing, even if it’s not fully proven that they’re looking at [a win], it attracts better responses.”

**Naghma Mulla, CEO, EdelGive
Foundation (India)**



Getting Started:

Boards:

Review CEP's [Grantee Perception Report](#) surveys and consider conducting one.

CEOs:

Identify opportunities for the foundation to solicit feedback from grantees more systematically, and ensure that the feedback is acted upon.

Programme officers:

Regularly solicit feedback from your grantees about how you can better support them and make the grantmaking process more efficient, and what kind of grantmaking time scale and flexibility would best support their work. Provide opportunities for both direct one-on-one feedback and anonymous feedback.

Grantees:

Provide funders your theory of change and multiyear vision and connect your strategy to both, demonstrating the arc of change and funding required to fuel outcomes versus outputs. If you are invited to complete a GPR, participate—funders that seek feedback take it seriously.

Additional Resources:

- [“Advancing Equity Through Feedback,”](#) Fund for Shared Insight and Leap of Reason Ambassadors Committee’s article on using feedback to advance equity
- [“The Power of Feedback,”](#) SSIR article, video, and slideshow collection on the power of feedback in the social sector
- [“How Listening to Constituents Can Lead to Systems Change,”](#) SSIR article on listening to participants to promote systems change
- [“Resetting the Grantor-Grantee Relationship,”](#) SSIR article on how changes in behavior and mindset can strengthen grantor-grantee relationships

Data Highlights:

- Funders rated grantee feedback as the number two most important factor for shifts toward flexible and multiyear funding (Accelerating Equitable Grantmaking Survey, MilwayPLUS, November 2021, n=30).

No. 3 Accelerator: Grantmaker Equity Lens

The motivator:

Racial reckoning in the wake of George Floyd's murder led funder after funder in the U.S. to [respond to documented racial bias](#) in grantmaking by launching racial justice funds and reducing grant restrictions to nonprofits led by Black, Indigenous, and other people of color (BIPOC). Equity-lens funding for other leaders from historically marginalized groups followed globally, with philanthropists like MacKenzie Scott and Jack Dorsey pioneering no-strings-attached multiyear grants. [Scott granted \\$586 million](#) to organizations advancing racial equity, 91 percent of them led by people of color. BIPOC leaders in turn described the increase in impact that sizable, unrestricted funding engendered. Said Scott grant recipient Kris Hayashi, executive director of Transgender Law Center in San Francisco, which works at the nexus of racial justice and transgender rights: "It allowed us to do so much and gave us sustainability. We planned out the next three to four years." Many grantmakers who commit to equity come to see unrestricted funding as an essential part of that commitment, because it gives leaders of color the resources, flexibility, and autonomy that they have not received from funders in the past.

Funder action that nonprofits support:

1. **Gather the data on whom you are funding** to understand the diversity of leaders you fund and how that aligns with the impact you intend, and set goals to bring grant recipients into alignment with your theory of change.

Who's doing it: [Satterberg Foundation](#)
[Ford Foundation](#)

2. **Uproot differential (even unconscious) reporting requirements for BIPOC leaders.** The historic gap in multiyear, flexible funding for BIPOC leaders has created an administrative burden that takes away time from program delivery and impact.

Who's doing it: MacKenzie Scott, Jack Dorsey grants have no reporting requirements. [Harris and Eliza Kempner Fund](#) have phone and Zoom reporting for all. [Rauch Foundation](#) contracted with [Intentional Philanthropy](#), which eliminated and streamlined reporting.

3. **Appoint board members and hire program officers with lived experience of the equity issues you seek to address** to identify and connect with nonprofit leaders of diverse race, caste, and gender.

Who's done it? [Oak Foundation](#)
[Ford Foundation](#)
[The California Endowment](#)

What grantmakers say:

"In fall 2020, following the uprisings for racial justice in the U.S., we made a commitment to strengthen the organizing and movement-building infrastructure of Black and Indigenous communities across the country called the Reparative Action Fund. This \$50 million fund, over 10 years, will fund Black- and Indigenous-led organizations with the spirit of using these grants as a reparative action for racial justice and racial healing."

Sarah Walczyk, ED,
Satterberg Foundation

"I'm a little worried about things like racial equity and trust-based philanthropy being another one of those fads that just sort of comes and goes after a couple or three years, and now we're onto the next shiny toy in philanthropy."

Dr. Robert Ross, President,
The California Endowment

"We started with an advisory team to help us in the area of including input from young people with intellectual disabilities. We changed how we presented our grant applications to them. We made videos. We worked with staff that knew these young people and engaged them in a process that exceeded everyone's expectations. The effort was worth it. We learned so much by working with them, and our grantmaking will be better because of it. Well, that was our step one for getting the voice of people with lived experience and lived expertise in the room with us and introducing them to the board. Fast-forward to this year, and we're working through the board process of getting more diverse people on the board. In the meantime, we're going to give money to our advisory team to grant out."

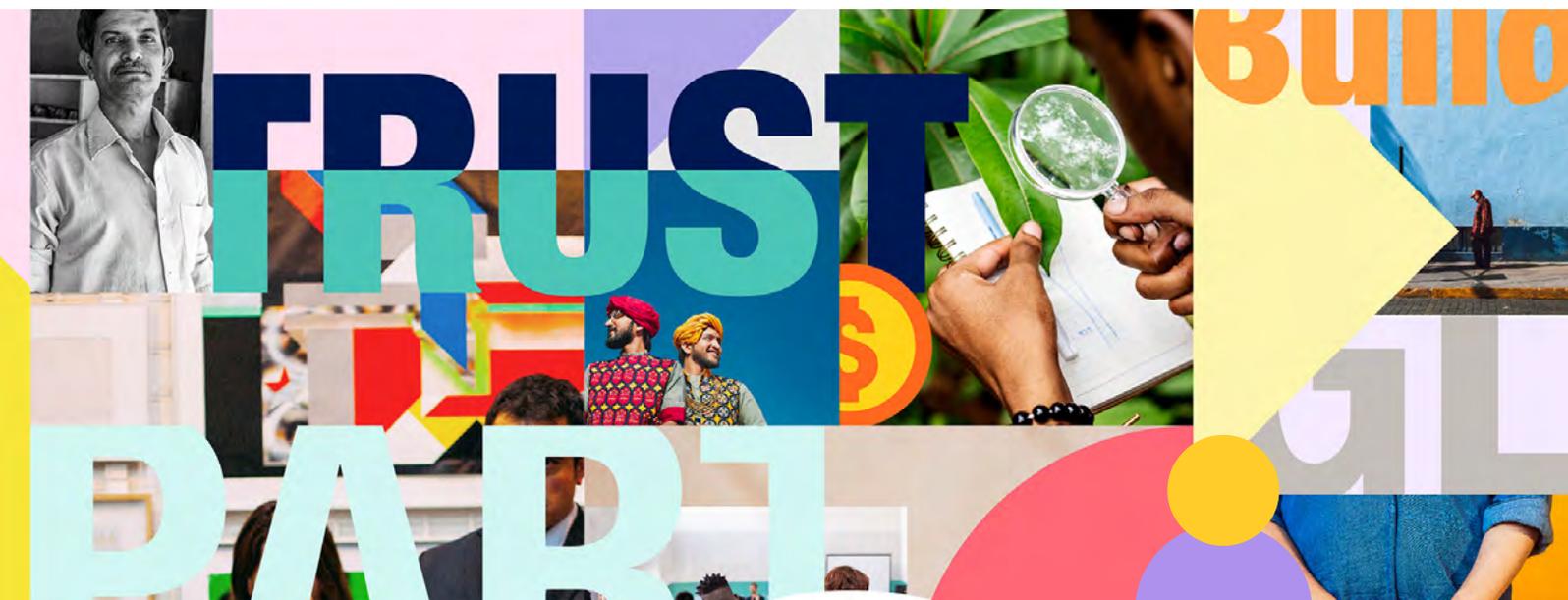
Tracy Sawicki, ED,
Peter and Elizabeth Tower Foundation

"One thing that we found works really well is helping to create partnerships between your grantees. We brought Erase Racism together with Teachers College, each of which has benefited from the other's experiences, expertise, and insights."

Nancy Rauch Douzinas, President,
Rauch Foundation

"We did huge values work for the first time in decades. The board cares about the pursuit of equity and generational impact. So we are starting to talk about what that really means not just in terms of grantmaking, but also in terms of opening up larger conversations about operations and board governance."

Lauren Scott, ED,
Harris and Eliza Kempner Fund



What grantees flag:

“The multiyear, unrestricted support Oak Foundation gave us helped us to think outside the box. We created a reserve for rapid response, hired people we needed, and, finally, our development staff could do their job.”

Tania Turner, ED,
Fondo Semillas (Mexico)

“Ford’s BUILD (team) knocked at our door, and I said, ‘Why me?’ And they said they had done their scouting and we were a fit. The BUILD grant (multiyear, flexible funding) has allowed us to afford our smaller grants.”

Julius Mukunda, ED,
Civil Society Budget Advocacy Group
(Uganda)

“Core support has allowed us to build a more equitable organization. It takes resources to have more equitable recruitment and employment policies that create opportunities for people who otherwise might not be here and that make us a richer, more useful organization for fulfilling our mission. Often, people coming from more marginalized backgrounds haven’t had any of those kinds of resources invested in them as human beings or professionals before.”

Andrew Kassoy, CEO,
B Lab

“The equity reckoning in May 2020 was huge for us. One reason it led to our garnering funding partners was the shared learning opportunity for funders to walk alongside of us, especially funders who didn’t engage in our work prior to May of 2020, because we’ve been doing this work for a while. We felt empowered to lead in this moment, demanding unrestricted investment in our work, to do the work we know how to do, and for funders to stand alongside us as supporting actors. The moment allowed us to shift power dynamics, for sure. Another reason: MacKenzie Scott de-risked [our organization]. It was a game changer.”

Cheryl Dorsey, CEO,
Echoing Green

“Starting with multiyear funding ... is even more important for communities who, whether it’s because of race or gender or class or disability, have faced historic and ongoing neglect from larger funding streams, because of the amount of catch-up funders have to do.”

Kris Hayashi, ED,
Transgender Law Center

“Many funder board members are more comfortable with a person who looks like them. I think it’s really telling when you have a leader who has lived through the problem the funder is trying to solve, and even that experience is not enough: The funder is more comfortable speaking to the white colleague, who they think has the expertise. It is about race and power.”

Karine Apollon, CEO,
Apollon & Partners

“Being a younger CEO who has not hit 30 yet has been a consistent challenge. When I am paired up with a COO who tends to be an older white woman, then some funders have a very different response in meetings and conversations. In fact, there’s been times when the conversation becomes between the funder and the white COO.”

Sixto Cancel, CEO,
Think of Us

“Some larger organizations blocked funders’ view of the work that we’ve been doing for years on the ground so that they didn’t even know we were here. We had to get a grant through another organization before we could get money directly. Now we’re building those relationships, and funders are actually in relationship with the people that have been doing the work on the ground. Ultimately, we were the first trans organization to be funded by the Chicago Foundation for Women. They wanted us to be on the board to further identify smaller organizations like ours and to [share our perspective].”

LaSaia Wade, ED,
Brave Space Alliance

Getting Started:

Boards:

Read “[Overcoming the Racial Bias in Philanthropic Funding](#),” and discuss ways your foundation needs to embrace humility and make changes. Review data on diversity of grantee leadership and funder staff at each board meeting. Assess your board’s diversity, equity, and inclusion practices, and commit to having your foundation embrace equity at the board level to set the tone for the entire organization.

CEOs:

Assess your foundation’s current practices against the [Equitable Grantmaking Continuum](#) and discuss the results at a staff meeting ([blog post with overview here](#)). Work with your board and staff to set meaningful equity goals for both foundation operations and for grantmaking. Hold yourself accountable for making progress on these goals.

Programme officers:

Assess the diversity of your grantee portfolio along key metrics: diversity and proximity of senior leadership, issues addressed, marginalized populations supported, etc.

Grantees:

Reject restricted funding where it will hobble you, and explain clearly to the funder just why.

Additional Resources:

- [Grantmaking with a Racial Justice Lens: A Practical Guide](#), Philanthropic Initiative for Racial Equity handbook to help foundations align their practices with a racial justice vision
- [Equitable Grantmaking Continuum](#), scorecard for funders to evaluate their progress toward equitable grantmaking, prepared by RVC and Vu Le ([blog post with overview here](#))
- “[Overcoming the Racial Bias in Philanthropic Funding](#),” SSIR/Bridgespan article on how funders can combat racial bias in their grantmaking processes
- [We Need to Change How We Think: Perspectives on Philanthropy’s Underfunding of Native Communities and Causes](#), First Nations Development Institute research report with strategies for increasing philanthropic giving to Native causes
- [Growing Inequity: Large Foundation Giving to Native American Organizations and Causes—2006–2014](#), First Nations Development Institute research report
- [Seeking to Soar: Foundation Funding for Asian American and Pacific Islander Communities](#), Asian Americans / Pacific Islanders in Philanthropy (AAPIP) report

- [Collective Good: Recommendations for Philanthropy on Racial Solidarity and Asian American, Native Hawaiian, and Pacific Islander \(AANHPI\) Communities](#), AAPIP report with 10 strategies to support and sustain community ecosystems, improve data equity, and reset harmful narratives about AANHPI people
- [“In the Struggle for Racial and Economic Justice, Don’t Forget Rural America,”](#) Nonprofit Quarterly editorial urging investment in rural areas
- [Mismatched: Philanthropy’s Response to the Call for Racial Justice](#), Philanthropic Initiative for Racial Equity research report on funding for racial equity and racial justice
- [OVERLOOKED \(Part 1\): Foundation Support for Asian American and Pacific Islander Leaders and Communities](#) and [OVERLOOKED \(Part 2\): Foundation Support for Native American Leaders and Communities](#), CEP report on concerning trends in relationships between funders and these two communities
- [The 2018 Diversity Among Philanthropic Professionals Report: A Tale of Two Sectors](#), Funders for LGBTQ Issues report on diversity in the philanthropic workforce
- [2018 Tracking Report: Lesbian, Gay, Bisexual, Transgender and Queer Grantmaking by U.S. Foundations](#), Funders for LGBTQ Issues report on totals and trends of grantmaking to support LGBTQ issues
- [The Out in the South Initiative](#), Funders for LGBTQ Issues report on initiatives to empower LGBT Southerners to shape their own lives and futures

Data Highlights:

- Funders rated an equity lens on grantmaking as the number three most influential factor leading to greater flexible funding and multiyear funding (Accelerating Equitable Grantmaking Survey, MilwayPLUS, November 2021, n=30).



No. 4 Accelerator: Global or Field-Level Crisis

The motivator:

A 2021 Center for Effective Philanthropy [survey](#) report found that during the COVID crisis three-quarters of foundations simplified their reporting processes and more than 60 percent gave more unrestricted dollars than prepandemic, with two-thirds planning to continue to do so. Leaders of nonprofits serving fields under political fire in 2020, like women's reproductive rights, LGBTQ+ rights, and immigrant rights, reported similar increases in support. "When the state denied our HIV AIDS program, it woke up other funders," said LaSaia Wade, executive director of [Brave Space Alliance](#) in Chicago. There seems to be no question that crises motivate funders to give more funding, more flexibly (although not necessarily multiyear), and nonprofit leaders were able to seize the moment to make core funding needs known.

Funder action that nonprofits support:

1. **Tap into community voice and expertise via grantees to understand crisis implications and get to "what matters" conversations quickly.** Where are the shortfalls in government services? What populations are most vulnerable? What policies are most important to push through? Then fund accordingly.

Who's doing it: [Satterberg Foundation](#)
[Foundation for a Just Society](#)

2. **Seize the opportunity to reform grantmaking.** Maintain as a norm all reductions in reporting requirements, funding constraints and deliverable detail that worked in crisis. Embrace the principle of simplicity and double down on approaches that shift reporting burdens, e.g., video check-ins where funder staff take notes or common reports for multiple funders. Convert long-simmering discussions of reform to new funding norms that allow grantees to build resilience and sustainability.

Who's doing it: [Harris and Eliza Kempner Fund](#)

3. **Start the conversation on revitalizing your values and focus.** Crises underscore the need to refresh board thinking on values and focus as social and environmental needs evolve. Don't miss the opportunity to galvanize the discussion.

Who's doing it: [Overdeck Family Foundation](#)

What grantmakers say:

“COVID made a difference ... My board formally adopted the Trust-Based Philanthropy agenda—decentered power, unrestricted funding, multiyear funding, reduced paperwork and support beyond the check. We are now in the process of customizing and implementing this approach and these principles for the Fund.”

Lauren Scott, ED,
Harris and Eliza Kempner Fund

“COVID was an accelerator in that it forced funders for different reasons to release control, and then they discovered, ‘Oh, it worked just fine.’ They were giving a lot of freedom to grantees they knew ... and in many cases the work actually got better.”

Larry Kramer, President,
William and Flora Hewlett Foundation

“I believe threats are often unforeseen, so the only way to be effective in a setting with dynamic threats is to make sure that the grantees are resilient and adaptable and well equipped to respond. This work is carried by movements and fields and strengthening them is what carries the work more durably. You get more bang for your buck by allowing the grantee to feel its way into opportunities and respond to threats than you do by trying to project and say, ‘This is what we want you to do over the next five years.’ ”

John Taylor, President,
Wellspring Philanthropic Fund

“For us, COVID was an accelerator of some sort [to make funds more flexible], but it was a journey we’d been on. As a staff I think it’s incumbent upon us to be alert to crises and opportunities and take advantage of those moments.”

Audrey Elster, ED,
Raith Foundation (South Africa)

“We had been in talks about moving to more general operating support before COVID, working with the board on trust-based philanthropy, sharing lots of articles ... but COVID gave us the moment to just do it! ... There was a coalition of nonprofits after COVID that wanted to keep pushing for general operating support. We asked, ‘Would it be helpful if we brought you all together? Sponsored it?’ Then we invited funder colleagues to come have a conversation.”

Tracy Sawicki, ED,
Peter and Elizabeth Tower Foundation

What grantees flag:

“I’ve been doing high-dosage tutoring work for 17 years and, with COVID, funders started paying attention. We have seven randomized control trials of our work that show it’s going to be among the most effective interventions ever rigorously studied in American schools. Our big goal is to use this as an opportunity to change the design of America’s schools to build effective tutoring into the regular school day.”

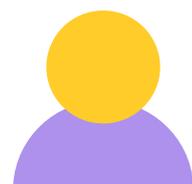
Alan Safran, CEO,
Saga Education

“The political threats are very real on so many different levels. Having flexible funding allows you to engage communications and advocacy and social media, and capture the voices of the constituents that you are working with in a way that’s meaningful and elevated.”

Mary Marx, CEO,
Pace Center for Girls

“I’ve seen incredibly big shifts to flexibility when COVID hit, among [both] existing funders and new ones.”

Matt Forti, Managing Director,
One Acre Fund



Getting Started:

Boards:

Read the [practices](#) of Trust-Based Philanthropy and assess your crisis grantmaking policies against them. Discuss and vote on ongoing policies that would preserve crisis-driven reductions on restrictions and longer timeframes on grants to drive greater impact in all times and build grantee resilience for the future.

CEOs:

Assess the impact of any pilot programs during the pandemic that reduced restrictions and extended timelines, and develop policy proposals to preserve practices that strengthened grantees, shared power, and increased impact.

Programme officers:

Gather stories and data about how unrestricted funding during a crisis has advanced strategy, mission, and organizational strength of grantees.

Grantees:

Testify to the need for ongoing multiyear, flexible funding to strengthen your organization for the next crisis and build resilience through retaining staff, building skills, and developing creative contingency and response plans.

Additional Resources:

- [“My Organization Is a Testament to Why Unrestricted Funding Matters,”](#) Chronicle of Philanthropy opinion piece by Nicholas Turner, president of the Vera Institute for Justice
- [“A Call to Action: Philanthropy’s Commitment During COVID-19,”](#) pledge signed by 800+ foundations to commit flexible resources to support nonprofit partners as they respond to the COVID-19 pandemic
- [Foundations Respond to Crisis: Lasting Change?](#) Center for Effective Philanthropy research report on foundations’ responses to the COVID-19 crisis
- [“Funders, this crisis is the time to significantly increase funding for advocacy and community organizing, not cut down on it,”](#) blog post by Vu Le of Nonprofit AF
- [“Building a Trust-Based Philanthropy to Shift Power Back to Communities,”](#) SSIR article about building and demonstrating a trust-based culture, investing in community leadership capacity building, and opening up decision-making and information-sharing structures

Data Highlights:

- Funders rated crises as the number four most influential factor in shifting toward more flexible funding
(Accelerating Equitable Grantmaking Survey, MilwayPLUS, November 2021, n=30).



No. 5 Accelerator: Group Influence by Peers or Sector

The motivator:

At the outset of the pandemic, the Council on Foundations asked funders to publicly commit to grantmaking practices that would sustain nonprofits and reduce reporting burden through the crisis, attracting more than 800 signatories to [the Pledge](#). This is just one example of the power of group influence to hold funder peers accountable in a movement to make grant dollars more flexible and long term. Other group influencers include collaborative funds, like [Funders for LGBTQ Issues](#) or [Fund for Shared Insight](#); community funds; and most powerfully [1:1 peer influence](#), especially at the CEO level. Nonprofits we surveyed rated funder peer influence the number one accelerator of multiyear, flexible funding, even as nonprofit movements and coalitions themselves, like Black Lives Matter, have played a great role in influencing more equitable funding flows. Funders rated peer influence much lower but held up nonprofit sector influence as a top five catalyst of change for both flexible and multiyear funding.

Funder action that nonprofits support:

1. **Take the Pledge to publicly commit to more equitable funding practices.** And look to multiyear funding to lift payouts without growing staff in the wake of endowment growth

Who's done it? [Harris and Eliza Kemper Fund](#), [Rauch Foundation](#), [Oak Foundation](#), [Peter and Elizabeth Tower Foundation](#), [Rockefeller Brothers Fund](#), [William and Flora Hewlett Foundation](#), [Overdeck Family Foundation](#), [Foundation for a Just Society](#), [The California Endowment](#), [Satterberg Fund](#), [Ford Foundation](#)

2. **Join a funder collaborative committed to equitable funding practices and introduce your grantees to other like-minded funders.** Broaden your collaboration with funders that share your mission and broaden your grantees' relationships with those funders.

Who's doing it? [The California Endowment](#)
[William and Flora Hewlett Foundation](#)

3. **Share and amplify research from nonprofits and intermediaries and your own experience to make the case for multiyear, flexible funding.**

Who's doing it? [Peter and Elizabeth Tower Foundation](#)

What grantmakers say:

"We try to find foundations similar in size, ones in our funding geographies, that are ahead of us in this work and use them as examples. We also found when our foundation is further ahead of other funder colleagues, they will call and say, 'Can my board member talk to yours?' and my board is affirmed, 'We're really doing something!'"

Tracy Sawicki, ED,
Peter and Elizabeth Tower Foundation

"We've found getting funders together for conversations [about paying what it takes to achieve impact] in groups of threes and fives helps. And when we've noticed one or two of our grantees have had budget issues because of approvals delay, we've requested a joint funders' meeting co-hosted with said grantee, which completely changed the way the grant was looked at by everyone. Because if funders who cover 80 or 90 percent of the budget come together, the conversation is usually about objectives and the long term. Decisions after that become more empathetic and trusting."

Naghma Mulla, CEO,
EdelGive Foundation (India)

"In the U.S., MacKenzie Scott's [no-strings-attached philanthropy] ... is setting a prominent example."

Lisa Wiersma, ED,
IMC Foundation

"Peer influence should not be underestimated. You find the peer groups that you're comfortable in, and those are the ones you really rely on. And you should make sure to find the peer groups that you're not always so comfortable in, because they're the ones that are going to challenge you to really examine your own behaviors and practices and biases and assumptions. My work with Bob Ross [president of The California Endowment] over all these years has been the best of both of these."

Stephen Heintz, President,
Rockefeller Brothers Fund

"There's engagement and learning that happens when funders come to participatory funds. Don't expect that you're going to turn up and give a small, very targeted, restricted one-year grant. Because you're going to be talked out of that by that group. In engaging with those funds, funders are pushed to do funding in a different way. Some funders make their first very flexible grants in collaborative funds, because [restrictions] are just not an option. They've got cover. Similarly, with whom they're moving funds to—to community funds, to intermediate women's funds, etc., all of these different, usually public, foundations that, in turn, are closer to who needs the funding and give flexible grants."

Nicky McIntyre, CEO,
Foundation for a Just Society



What grantees flag:

“You can use a Jack Dorsey grant to influence others. We received \$480,000 in the first round and got to work helping 30,000 kids across 48 states.”

**Sixto Cancel, CEO,
Think of US**

“One Acre Fund’s most successful multiyear, flexible funding tends to be the collective giving initiatives like The Audacious Project, where funders have preorganized for, in most cases, five-year investments funding things like systems change, policy and movement building.”

**Matt Forti, Managing Director,
One Acre Fund**

“Easily 20–25% of our grantmaking is going to participatory-led funds. That’s important because they all insist that the money that they get be, first and foremost, flexible support and long-term support.”

**Cheryl Dorsey, CEO,
Echoing Green**

“We’ve had great experiences with some funder collaboratives. In one instance, several different foundations worked together to provide true risk capital in a way none of them individually had been able to bring themselves to provide—this was quite efficient and really thoughtful. On the other hand, we’ve pursued some collaborative funding opportunities that were tons and tons of up-front work and led to nothing, particularly some of the competition-type collaborations. Obviously, there are huge bounties for whoever wins, but the work required, for most organizations, is over the top, especially if they don’t have a planning grant.”

**Andrew Kassoy, CEO,
B Lab**

“I have seen funders think about the ecosystem of groups who need to come together to achieve a long-term, audacious goal and actually embed in that ecosystem to do strategic thinking along with grantees, creating something more akin to peer-to-peer relationships. It facilitates trust all around and allows everybody to understand their roles within the larger scheme, to speak candidly, and to be real about whether a project is going according to plan and if not, what has to pivot.”

**Abigail Dillen, President,
Earthjustice**

“What started to shift Transgender Law Center from surviving to more thriving was when we got a MacKenzie Scott grant, [which provided] substantial, multiyear resources. Our opponents fund deeply, fund long term, and fund risk. They’re not thinking, what is the kind of year-to-year? So what can we actually learn from the ways our opponents are resourcing their movements?”

**Kris Hayashi, ED,
Transgender Law Center**

“When grantees get together, it lights us up. We could exercise some grantee power, I suppose, if we had organizations of grantees.”

**Alan Safran, CEO,
Saga Education**

“There’s a real need for partnership here from grantors and grantees on how we think strategically as an ecosystem, and support grantees to plan what they are doing, and [align it] with the other peers and partners.”

**Monisha Kapila, Co-CEO,
ProInspire**

Getting Started:

Boards:

Read the Council of Foundation's [Call to Action](#) pledge commitment during COVID-19 and consider signing it.

CEOs:

Review collaborative funds related to the fields you support and consider joining one, or forming one.

Programme officers:

Hold update calls across grantees to share their experiences about the impact of flexible, multiyear funding and report the learnings to your CEO and board. Join a funder learning network at GEO or CoF that shares research and experience on the impact of multiyear, flexible funding and share your learnings with peers.

Grantees:

Hold regular update calls with funders to grapple with issues and share the impact of long-term flexible grants, like MacKenzie Scott's, to inspire other funders. Join or create ecosystem networks to strategically advance the movement to build funders shared understanding of excellent grant practice.

Additional Resources:

- [“A Call to Action: Philanthropy’s Commitment During COVID-19,”](#) pledge signed by 800+ foundations to commit flexible resources to support nonprofit partners as they respond to the COVID-19 pandemic
- [Listen, Learn, Lead: Grantmaker Practices That Support Nonprofit Results,](#) Grantmakers for Effective Organizations guidebook on effective practices
- [“\[Proposal forms are\] 39% similar; how can we be exponentially better?”](#) candid Fix the Form Project blog post about similarities in proposal forms between grantmakers and opportunities for efficiencies through coordination
- [“Funding Feedback,”](#) SSIR case study on the development of the Fund for Shared Insight funder collaborative to advance the practice of gathering, listening to, and acting on grantee feedback
- [Influencing Funder Practice,](#) Ford Foundation collection featuring an article on proven elements of funders influencing funders with six case studies

Data Highlights:

- Funders rated pressure from the nonprofit sector as the number five most influential factor leading to more flexible funding (Accelerating Equitable Grantmaking Survey, MilwayPLUS, November 2021, n=30).



No. 1 Barrier: Budget Policies

The challenge:

When funder budget policies fail to neither dovetail the arc of funding with the arc of social or environmental change, nor strengthen or empower grantee organizations for the journey, they undermine a funders' own mission. Sometimes, the policy at cause is an arbitrarily fixed overhead rate. Often, annual budgeting impedes multiyear commitments and raises fears among trustees of "selling out the docket" and leaving them with little to do, or little to give, should crises arise. And sometimes funders pause to refresh budget strategy (and grantmaking) with little regard to grantees' own funding cycles.

Funder solutions that nonprofits support:

1. **Budget segmentation, e.g.**, creating an emergency fund for crisis response distinct from program budget or a "duration fund" to extend one-year grants to multiyear without drawing down program budgets.

Who's doing it? [William and Flora Hewlett Foundation](#)
[Wellspring Philanthropic Fund](#)

2. **Establish multiyear, general operating support as a default grant structure**, and ask program officers to defend any alternate recommendation (e.g., a one-year research grant or GOS-like program grant to fund a school within a university).

Who's doing it? [Oak Foundation](#)
[Wellspring Philanthropic Fund](#)
[William and Flora Hewlett Foundation](#)
[IMC Foundation](#)

3. **Multiyear foundation budget to support multiyear grantmaking.**

Who's doing it? [Rockefeller Brothers Fund](#)

What grantmakers say:

"We start with the end game: We want grants to be as unrestricted as possible, so there has to be a reason for restricting them, and that isn't 'We don't trust you' (in which case we shouldn't be making a grant). After the Great Recession, as the endowment grew back, we didn't put all the money back into programs. Instead, we created a substantial pool of unallocated funds, which we keep equal to about 25% of our grant budget. If there is a crash, that's what we cut, so we can maintain support to grantees; in most years, we can use those funds flexibly for a wide variety of things."

Larry Kramer, President,
William and Flora Hewlett Foundation

"Our endowment has increased in the market, and that puts pressure on us to deploy our resources better and differently. Multiyear and flexible funding rises to the top quickly in those conversations."

Lisa Wiersma, ED,
IMC Foundation

"We've been so impressed with the outcomes of the 10 years of Building Healthy Communities work. The smartest thing we did was to agree [the funding] should be for 10 years."

Dr. Robert K. Ross, President, The California Endowment

"We channel some of our funding through intermediaries ... and what actually gets regranted by our intermediary partners is multiyear core support. That's a good way to break through possible budget barriers: Work with intermediary partners who have the capacity to provide core and multiyear support."

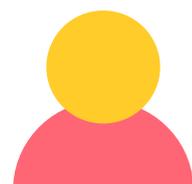
Adriana Craciun, Senior Adviser of Organisational Development and Capacity Building,
Oak Foundation (Switzerland)

"Another tool is for funders to move to multiyear budgets institutionally. If the funder is on a multiyear cycle, it helps provide space to fund [nonprofits] on a multiyear cycle. Last year, we got our board to move to a biannual budget, a good step forward."

Stephen Heintz, President, Rockefeller Brothers Fund

"The gold standard is general operating support, which we can only give to a 501c3 or its equivalent. But I actually think there is a spectrum of opportunities for donors to move the needle in being more flexible. Expenditure responsibility grants, where we are funding the broadest possible swath of the organization's activities, are really the functional equivalent of general operating support. Legally it's a restricted grant, but it's a grant that funds any of your exempt activities."

John Taylor, President, Wellspring Philanthropic Fund



What grantees flag:

“A funder strategy that shifts often is likely to be in sharp tension with the kind of multiyear budget investments by grantees that are required to deliver truly meaningful results. Funders may want to cover the costs of a particular engagement, not recognizing that ultimate success on a given issue will depend on much more comprehensive work over time. It’s just not a funding strategy that builds necessary capacity and power over time.”

Abigail Dillen,
President, Earthjustice

“There are often funders (and we see this because we fund such early-stage folks) that have a requirement that a particular organization have a minimum budget size before they’ll consider it. It’s an exclusionary act of locking out so many smaller, community-based proximate groups because of those, I think, arbitrary frameworks. If you get rid of that, that opens you up to a whole host of investments in folks who are doing work in the community, on the ground, which could be game changing. And if the [community groups] don’t meet that minimum [budget] requirement, then add in general operating support to help them grow their budget to meet the level of your requirement.”

Cheryl Dorsey, CEO,
Echoing Green

“Funding the whole organization matters a lot to the outcomes. Our experience, particularly early on, was that funders wanted to fund a particular project instead of our organization. This is a problem with the philanthropic mindset. You’d never say, as an investor, we’ll fund this product line that you’re developing, but we’re not going to invest in your business as a whole (a strong team, good tech infrastructure, etc.).”

Andrew Kassoy, CEO,
B Lab

“Budget policies can be a huge [barrier] because there’s such a reluctance from many funders to fund things that are not direct service or specifically programmatic. When we started with one of our multiyear funders, we had a direct service model, but we didn’t have a business infrastructure. We needed to build our systems and processes.”

Mary Marx, CEO,
Pace Center for Girls

“It can be [time-consuming] to fit our budget into the funder’s templates, and you have to do that because the funder’s board is used to seeing numbers in a certain way.”

Sixto Cancel, CEO,
Think of Us

“We’re now in a position, having received a lot of multiyear flexible funding, to say to the next funder who wants to fund us, ‘Look, I’m interested in a longer-term commitment.’ ... If the funder wants us to succeed and achieve not just our growth and scale measures, but impact, or maybe create a movement ... we need talent ... [we need] a multiyear guarantee that I’ll be here to pay [those I hire] and help them grow and to build both their skills and their compensation over time, based on results. So I need funders to be part of that virtuous cycle.”

Alan Safran, CEO,
Saga Education

Getting Started:

Boards:

Discuss segmenting your budget into ongoing program funds and emergency funds, and/or carving out a special fund to move ongoing program grants to multiyear over time. Discuss moving to a multiyear budget to support multiyear grantmaking.

CEOs:

Make this tool kit the subject of your next board meeting. Discuss what it would mean to make multiyear, flexible funding your default grant structure. Identify the specific policies and practices you would need to change.

Programme officers:

Define expenditure responsibility grants and programmatic grants broadly, so they act like general operating support. Offer a simple, low-touch grant renewal process as a step toward multiyear funding.

Grantees:

Introduce your full organization's needs to support objectives, even if the grant is structured as a project. Define for your funder what "flexible funding" means to you, the ways it will be used, to eliminate confusion. Equip regrantors with data to make the argument to their grantmakers for longer-term funding.outputs. If you are invited to complete a GPR, participate—funders that seek feedback take it seriously.

Additional Resources:

- [“Pay-What-It-Takes Philanthropy,”](#) SSIR/Bridgespan article on the need for funders to cover grantees’ full overhead costs
- [“Funders, you want to help build organizational capacity? Then stop trying to build organizational capacity and just give Multi-Year General Operating Dollars \(MYGOD!\),”](#) blog post by Vu Le of Nonprofit AF
- [“The Nonprofit Starvation Cycle,”](#) SSIR/Bridgespan article on the vicious cycle that leaves nonprofits unable to effectively accomplish their missions
- [“The Looking Glass World of Nonprofit Money,”](#) Nonprofit Finance Fund article on the irrationalities of nonprofit funding
- [“Building Strong, Resilient NGOs in India: Time for New Funding Practices,”](#) Bridgespan article on the underinvestment in nonprofits in India, and better funder practices that can change this

Data Highlights:

- Funders and nonprofit leaders both rated budget policies as the number one barrier to more multiyear grants, and nonprofit leaders also rated budget policies as the number one barrier to more flexible grants (Accelerating Equitable Grantmaking Survey, MilwayPLUS, November 2021, n=30).



No. 2 Barrier: Board Bias for Control

The challenge:

Some boards restrict grants in size and duration out of a bias for control, avoiding long-term commitments to limit risk, in the event that markets fluctuate, and to ensure funding for future needs. Some limit grant duration to ensure annual checks on progress and an opportunity to exit should grantee plans fall short. Unconscious or not, such biases are reflected in agendas that focus on financials and oversight that reviews the success or failure of individual grants. This shortchanges the use of philanthropic dollars as the ultimate risk capital to fund answers to voids in society. It also undermines strong partnership with grantees, whose success is, ultimately, any funder's success.

Funder solutions that nonprofits support:

1. **Clarify values:** Explore positive values that most trustees would agree can help any organization achieve its goals, such as being objective-driven, fostering equity and loyalty, rewarding good work, and embracing risk/reward, all values that auger for strengthening and sharing power with a funder's staff and grantees. Explore objectives, like scaling impact, and whether your grantmaking approach supports it. Use board conversations about values to inculcate the notion of risk capital as an asset.

Who's doing this? [Rockefeller Brothers Fund](#)
[Harris and Eliza Kempner Fund](#)
[Overdeck Family Foundation](#)
[EdelGive Foundation](#)

2. **Bring community voice to the boardroom—and the board to the community:** Invite nonprofit and community leaders onto your board to bring perspective on empowering grantees. Bring grantees to board meetings to share the problems they confront and resources it will take to address them—and compensate them for their time. And take your board to the community, to see the true nature of grantees' work and the time and resources it takes.

Who's doing this? [The California Endowment](#)
[Rockefeller Brothers Fund](#)
[Oak Foundation](#)

3. **Focus board discussion on portfolio results vs. individual grants.** Discuss how program portfolios are advancing fields you care about, and shift the lens to one of learning and growth vs. grantee success or failure.

Who's doing this? [William and Flora Hewlett Foundation](#)

What grantmakers say:

"I think that having an explicit conversation with the board about risk is really important: What is the risk profile of the institution, the risk appetite of the board, and how is risk managed? That brings to the surface bureaucratic questions, legal questions, and the question, what are we here for? If we're not taking risks, who the hell is going to take risks in our society? But the board needs to understand that. We spent most of the day at one board meeting a couple of years ago on risk, and we looked at risk across everything we do from the management of our endowment, to our grantmaking, to our communication strategy, to where we deploy staff around the world. It was a comprehensive discussion and it really helped us build greater comfort with the fact that we have a pretty high risk profile and that's actually an asset, not something to be feared and avoided. In addition, the accumulated experience of [community] trips has changed the board's attitude toward longer-term grantmaking and general support for grantees with whom we've had a considerable relationship. And it's also helped them have greater trust in the staff. Over time, we've moved from the board approving almost every grant [to trusting staff on almost all grant decisions], which has been a major change in the culture of the Foundation."

Stephen Heintz, President,
Rockefeller Brothers Fund

"I really think the core ingredient to multiyear, flexible funding is making the case. For example, I encourage our grantee partners at board meetings to talk about the difference between core funding and other funding and what it means to their impact."

Doug Griffiths, President,
Oak Foundation (Switzerland)

"One way we've influenced board beliefs [as a corporate foundation] is by taking some of the values that are important to our core business and applying them to the foundation. That includes a real effort to give people a lot of responsibility in a flat organization that is a meritocracy. We want to find good [nonprofit leaders], and trust them and give them [time and space] to do what they do ... For example, we've developed direct relationships with the leaders on the ground in Tanzania through visiting twice. They provided us the opportunity to meet with government officials whom they're working with, which has been a key component of the program work. Through that access and building direct relationships, we've built trust."

Lisa Wiersma, ED,
IMC Foundation

"For our board, this question of having greater proximity to the communities and the leaders that we're funding has been critical to building trust, getting feedback, and accepting that multiyear long-term flexible support is really critical. Our board heard great activists talk about this, and they built a lot of trust from that point."

Nicky McIntyre, CEO,
Foundation for a Just Society

"Accelerating this movement is important, but it's also at least as important, if not more important, to ground it in some durability. We need to think about what would make these accelerators more durable and lasting to a board, such that a new CEO who comes in can't erase them and say, 'Well, that was the previous CEO. We're not doing that anymore.'"

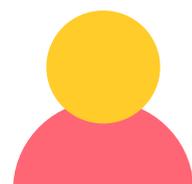
Dr. Robert Ross, President,
The California Endowment

"We intentionally use the language 'partner' rather than 'grantee.' It puts the partner in the center, and us in service to the partner. [As staff], we present our partners in a way that builds trust in front of our trustees. Bringing trustees to see projects and partners in practice is helpful. It's important that our trustees actually understand and see the work in the field."

Adriana Craciun, Senior Adviser of Organisational Development and Capacity Building,
Oak Foundation (Switzerland)

"The last 45 minutes of every board meeting we invite a grantee to come and share their work and the problem they are solving. It's not a pitch to the board because they're already our grantee. It's about learning. Our board meetings have become much, much richer. Board members want to go home with something new that they've learned and to be able to contribute more to the meetings."

Naghma Mulla, CEO, EdelGive Foundation (India)



What grantees flag:

"Philanthropy should be the ultimate risk capital. It's money that should be given where the market has failed the most. By definition, that's the greatest risk. Encouraging foundation boards or decision makers to think about their funding as the opportunity to fill voids requires embracing a risk mindset."

Andrew Kassoy, CEO,
B Lab

"Some funders are biased against funding advocacy and policy change, but there was a moment in time that was really an opportunity, and investment needed to be made in that kind of work. One of our major funders brought us to their board meeting, and that made a big difference for the funder to think about funding advocacy and policy change."

Mary Marx, CEO,
Pace Center for Girls



Getting Started:

Boards:

Discuss the impact that you'd like to see through your portfolio of grantmaking, and the values underlying those aspirations for impact. Identify where your values and beliefs may be in tension with your actions as a foundation and discuss ways to align them better.

CEOs:

Build time into board meetings to discuss portfolio-wide impact and how the foundation could lean more into longer-term support for the issues that you care about.

Programme officers:

Identify which of your grantees would be most compelling to your board and invite the grantee to come present on their work and explain the benefits of long-term, flexible support.

Grantees:

Tell your program officer that you'd value presenting your work to the board and prepare to show the positive impact of general operating support on advancing your shared mission as well as realistic timelines for change.

Additional Resources:

- [Making It Happen: A Conversation Guide](#), Center for Effective Philanthropy resource for foundations seeking to start providing, or to provide more, multiyear general operating support grants
- ["Building Long-Term Partnerships with Nonprofits to Scale Impact,"](#) Philanthropy News Digest article on lessons learned from sustained funding relationships

Data Highlights:

- Nonprofit leaders rated board biases the **number two** barrier to more flexible grantmaking (Accelerating Equitable Grantmaking Survey, MilwayPLUS, November 2021, n=30).

No. 3 Barrier: Imbalance of Power

The challenge:

Balance of power dynamics surfaced as a third barrier to multiyear, flexible funding in our study. Intimidation factors related to relative wealth, geo-economics, race, caste, age, and more can make it difficult for nonprofit leaders to ask funders for the grant conditions they truly need to make headway on social or environmental change, especially when grantmaker norms run counter to what is most helpful.

Funder solutions that nonprofits support:

1. **Systematically solicit and pay attention to grantee feedback** on both the foundation's norms and program officers' service. Ask your grantees how many hours go into reporting and applying for grants, as well as what could improve communication and transparency.

Who's doing it? [Overdeck Family Foundation](#)
[William and Flora Hewlett Foundation](#)
[Ford Foundation](#)

2. **Appoint nonprofit and community representation to your board, and set an example of radical candor.** Make grantees peers in the boardroom and maintain an ongoing dialogue across all grantee-funder interactions regarding objectives and challenges, sharing the foundation's own struggles and learnings.

Who's doing it? [The California Endowment](#)
[Peter and Elizabeth Tower Foundation](#)

3. **Adopt a mindset of humility.** The foundation's success can only be expressed as its grantees' success, and work to inculcate this thinking across staff and board, highlighting the proximity to community and impact grantees bring to the funder.

Who's doing it? [IMC Foundation](#)
[Satterberg Foundation](#)

What grantmakers say:

“When you trust those closest to the work, the partners you’re investing in, and give them time, good outcomes will result.”

Dr. Robert Ross, CEO,
The California Endowment

“Our Board is not very diverse, and the average age is 70. We realize we need to change this to be more in tune with and approachable by grantees. We’ve been working with advisory team members who are young people, 18–26 years old, living with the issues that are important to the Foundation. This is one way to engage with the community and to create a diverse pipeline of future board members.”

Tracy Sawicki, ED,
Tower Foundation

“Although we’re always going to have more power as a funder, the multiyear piece is critical to balancing the relationship. We renew for five years because it’s about constantly showing up and building relationships outside your identity as a funder, not always asking reporting questions but connecting as human beings.”

Sarah Walczyk, ED,
Satterberg Foundation

“Humanitarian work is not science. It’s a combination of things, most of which are not in our hands. So our premise is that the best-laid plans can be set aside. We encourage conversation on what’s not working first ... We also give our assurance that we are on the same page ... and will join their voice in representing the message.”

Naghma Mulla, CEO,
EdelGive Foundation (India)

“In a new grant we made, we gave an additional amount to regrant to organizations they knew that were led by people of color, because they had more knowledge of the landscape and could judge who would be a good partner to enhance the work.”

Lisa Wiersma, ED,
IMC Foundation

“There are many ways we can attempt to chip away at the power imbalance in the relationship between funders and grantees. For example, how are we opening up access to other funding, even from other programs within foundations? How are we bringing greater visibility to the work of our grantees? And, how are we bringing grantees into our work to shape our programs and strategic directions?”

Nicky McIntyre, CEO,
Foundation for a Just Society

“We want board members who are really grounded in the work that we’re doing ... let’s say a third of the board with that experience. And take it one step further, we’re establishing a youth advisory group to the board ... infusing the kind of perspective that we don’t normally get on the board.”

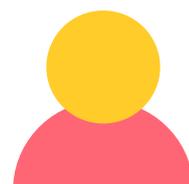
Hanh Cae Yu,
Chief Learning Officer,
The California Endowment

“When I think about balancing power between grantmakers and grantees, I think about how the nonprofit sector needs allies in other sectors, across business, labor, and community. Place-based foundations have the power and the capacity to play a kind of agent’s role in making that happen, and we should.”

Nancy Rauch Douzinas, President,
Rauch Foundation

“One important step we took was to recruit an amazing Black professional woman to be a community board member and had a really open dialogue with the board-nominating committee. She shared, ‘I know why I’m here and let’s do it.’”

Lauren Scott, ED,
Harris and Eliza Kempner Fund



What grantees flag:

"If you want to shift power, after giving a grantee a multiyear award, give them a seat on the board. And give them a sum of money to distribute to smaller organizations, the ecosystem's next generation."

Alan Safran, CEO,
Saga Education

"What makes a [balance of power] difference is when a funder says the funding is in support of us—we are doing the hard work. ... We notice: Are they soliciting feedback? How do they exit grants? Are they asking before connecting other people to us [i.e., respectful of our time]?"

Matt Forti, Managing Director,
One Acre Fund

"We think it's great when a new funder starts the relationship off by coming to us and saying, 'How can we help you? We trust that you know how you're doing the work. We're not going to question how you're doing it, or why you're doing it, or pick and choose these aspects, and ask you to do this whole new thing.' This starts the relationship with trust that enables the type of communication that allows for coming up with mutual goals. So when down the line there are problems or obstacles or even things that the foundation wishes to do that we may not be doing, the dialogue is open. Starting out with the simple, 'what can we do to help?' goes a long way in creating trust."

Joanna Helou, Chief of Staff,
Echoing Green

"Remember, the NAACP was formed as an anti-lynching organization. When the Garland Fund got in there, they said, 'We're going to give you money,' but it was tied to shifting their focus to an education reform agenda. We'll never know the counterfactual: What if the NAACP had been left to do what it set out to do? How would history have been different? The role of the funder [should be] to help organizations build power, build their capacity, and build their resilience ... Equity in the system is broken. It requires such a fundamental reformulation of the sector. That's a pretty heavy lift. I think you've got to work at all levels. The justice funders network uses a just transition rubric that says, 'We have to go on a journey together and it's got to happen at every single level over time.' We [need to] help people map out what that journey looks like—everything from the endowment to the relationship, to the grantee, to the operational principles."

Cheryl Dorsey, CEO,
Echoing Green

"To shift the power, first you need to acknowledge that the partner you are talking to has expertise and knowledge about their context and what they are doing. If you really think that you are a partner of that grantee, you will treat them differently. The conversation and the dialogue should be peer to peer."

Tania Turner, ED,
Fondo Semillas (Mexico)

"It's so helpful when funders have told us what the opportunity is and been straightforward about the amount of work, even if the answer is that it's a small project grant. Then we can decide for ourselves that it's worth putting our people through the amount of work to build that relationship and receive that level of support. It's also helpful if that conversation happens earlier in the process—then the grant process feels more like confirmatory due diligence. That changes the power dynamic a lot (there is a mutual exchange of value)."

Andrew Kassoy, CEO,
B Lab

"Regranting through organizations that are well-positioned is fantastic. But if it's a regrant to a player within a coalition, it can create really hard pressures on that group to retain trust and cohesion in the group. All funders know how intense it is to choose who gets money and how much of it. Putting a key doer in the position of making those choices is a fraught enterprise."

Abigail Dillen, President,
Earthjustice

"Really sharing power means shifting who's on the board. The board should not be deciding grants, or approving the portfolio amounts, or amounts that go to each grantee. The board should be making strategic decisions about how to invest multi-generationally, and [we should] have the folks who are closest to the ground on the board."

Monisha Kapila, Co-CEO,
ProInspire

“Many grantees don’t think that what we say really impacts funders. This conversation [about shifting to unrestricted, multiyear funding] that we’re having is the same conversation we were having 25 years ago. We haven’t seen much change, even though we’ve been calling for it for so long.”

Kris Hayashi, ED,
Transgender Law Center

“For a nonprofit leader to be at the table and see somebody that looks like them, there’s an instantaneous kind of connection. You now feel like you have an ally. Young people and people of color feel that when they walk into the [board]room, there’s an instant barrier that goes up. But if the focus is on the mission and the work that needs to be done, who better to speak of that experience and share first-hand experience on the solutions that work?”

Karine Apollon, CEO,
Apollon & Partners

“During the pandemic, we started giving away money because that was a solution for some people’s problems. They just needed a check. We had a very influential individual call us and be like, ‘Are you really giving away money?’ And I was like, ‘If I was an older white male, you would not be calling me, asking me if I’m really giving away money. In fact, you’d be talking about how I’m not giving away enough money.’ They didn’t like that.”

Sixto Cancel, CEO,
Think of Us

“Unexpected changes on the donor side can be a big struggle for grantees. It makes a big difference if donors provide transparency and disclosure at an early stage, and take the grantees into their confidence if a bar changes, so grantees have time to anticipate and plan and prepare.”

Melissa Fourie, ED,
Centre for Environmental Rights
(South Africa)

“Funder-grantee partnership is about sharing the pain and gain. If we have a campaign and do not succeed, instead of disparaging us, let us understand why we have not achieved it. But if I win a campaign, I want you to be with me, because you have been my supporter. We share it together.”

Julius Mukunda, ED,
CSBAG (Uganda)

“I believe that how power flows, and funding as a marker of that power, is actually the biggest barrier to achieving the positive societal change that we seek.”

Lisha McCormick, ED,
Last Mile Health

Getting Started:

Boards:

Consider putting community members or other proximate stakeholders on the board. Ensure that strategy refreshes are not disruptive to grantees, i.e., by giving one-year bridge grants. Ask before planning or implementing strategy refreshes whether that will cause disruption to grantees.

CEOs:

Take time each month to listen to grantees. Reduce power imbalances. In addition, take the money out of the room by also seeking grantee feedback in ways that are anonymous or facilitated by others. Enlist grantees to redistribute funds to smaller and/or more diverse groups or community members. Work through NCRP's [Sharing Power](#) exercises with your staff.

Programme officers:

Show curiosity about and support for a grantee's entire organization and concerns, not just the parts that relate to the foundation's strategy and goals. Listen as much as you talk to grantees. (See [Seven Habits of Excellent Work with Grantees](#).)

Grantees:

Get one of your multiyear, flexible funders to share their experience with others; invite funders to meet with you as a group to discuss long-term objectives (e.g., CEO Sixto Cancel of Think of Us routinely does this). Be candid at the outset about what helps and hinders.

Additional Resources:

- ["Power Moves—Ignite the Power of Your Philanthropy for Equity and Justice,"](#) National Committee for Responsive Philanthropy tool kit to help foundations discover how well they are building and sharing power for maximum social impact
- ["Funder Practices for Transformative Partnership,"](#) Muso's recommendations for funders that seek transformative relationships and impact
- ["Building a Trust-Based Philanthropy to Shift Power Back to Communities,"](#) SSIR article about building and demonstrating a trust-based culture, investing in community leadership capacity-building, and opening up decision-making and information-sharing structures
- ["Building Long-Term Partnerships with Nonprofits to Scale Impact,"](#) Philanthropy News Digest article on lessons learned from sustained funding relationships
- [Seven Habits of Excellent Work with Grantees,](#) Hewlett Foundation guide for foundation staff to help them create strong, mutually respectful and highly productive relationships with grantees

Data Highlights:

- Nonprofit leaders rated funders' "challenges understanding the field" as the number three barrier to more flexible grants (Accelerating Equitable Grantmaking Survey, MilwayPLUS, November 2021, n=30).



No. 4 Barrier: Beliefs About Accountability

The challenge:

Funders and nonprofits cited beliefs about accountability as a fourth barrier to multiyear, flexible funding. Funders focused on closely tracking individual grants can believe in multistep applications and due diligence; shorter, project-related grant periods; and bespoke reports related to project details. And funders concerned about empirical evaluation can seek to structure grants around project elements that can be quantified. Both beliefs create a burden of paperwork, disempower grantees and their participants as experts in their own experience, and trade off pursuing holistic measurement of overall grantee impact within a portfolio for short-term data creation.

Funder solutions that nonprofits support:

1. **Invite grantee dialogue to get close to work.** Some funders are offering time-saving alternatives to reports like phone or Zoom calls, which put the burden of listening and report development on the funder.

Who's doing it? [Harris and Eliza Kempner Fund](#)

2. **Embrace a common report.** Some funders invited grantees to submit proposals and reports they had on tap that were created for other donors.

Who's doing it? [IMC Foundation](#)
[EdelGive Foundation](#)

3. **Look for the places where funder and grantee strategies (vs. programs) overlap and provide general operating support.** This both unrestricts funding and allows grantees to measure and report across the full set of interventions that advance a shared goal.

Who's doing it? [The California Endowment](#)
[Raith Foundation](#)
[William and Flora Hewlett Foundation](#)

What grantmakers say:

“The Zoom reporting has been transformational. Because it’s easier for the grantee, but way more time-intensive for us: We’re the ones taking notes that become the report. But we’re also having real conversations and building relationships. And we’re seeing trends emerge that we never usually see and hear about, such as organizational and strategic challenges that would not show up in a traditional written report.”

Lauren Scott, ED, Harris and Eliza Kempner Fund

“We actually don’t have a grant application. We find out about [nonprofit leaders]. I say, ‘Can I come visit you? Talk to you?’ And we don’t ask for any kind of formal agenda for a site visit. I like to think that through a casual conversation, it forms a foundation for us to be honest with each other.”

Lisa Wiersma, ED, IMC Foundation

One way we demonstrated why trustees should trust grant partners was through audits. We started with our smaller grants. Instead of requiring each grant partner to submit financial reports and supporting documentation, we conducted random reviews. It was a good process that rarely, if ever, revealed issues. It saved everyone precious time and satisfied the Board.”

Tracy Sawicki, ED, Peter and Elizabeth Tower Foundation

“It’s about fostering a culture where your program officers are encouraged to trust grantees and are rewarded for doing so. We do this in various ways, of which the presumption of long-term unrestricted support is only a part. For instance, program officers are expected to assess whether their grants ‘succeed’ or not, but not by telling grantees how to measure success. Instead, we ask the grantee to tell us how they want to measure whether their grants are working. And while the individual program officer follows that, at the program and foundation level, we don’t ask about the success of individual grants. We track progress of the overall strategy. So the program officer doesn’t have to worry about every grant succeeding, only about progress on the whole, which gives them room to experiment.”

Larry Kramer, President, William and Flora Hewlett Foundation

“One thing we do: If there are adverse circumstances for a grantee, we make the conversation about the threats and how to navigate them, not justifying the original grant. The conversation is not about, ‘You need to resell me on your work.’”

John Taylor, CEO, Wellspring Philanthropic Fund

“We’ve moved to core funding for grantees: Our approach now is: ‘Here’s an amount of money. You don’t need to tell us what the specific project outputs are. You don’t need to give us a project budget either. We just want to know you have a good strategy in place and good management systems (including financial management) in place.’ That’s all.”

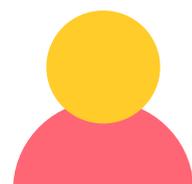
Audrey Elster, ED, Raith Foundation (South Africa)

“[Our] monitoring and evaluation results from a 10-year initiative, Building Healthy Communities, showed successful impact ... When we asked the grantees what helped most they told us general operating support and multiyear support ... If you are funding organizations that do advocacy and organizing and activism, they will translate [general operating] dollars into highly leveraged wins.”

Dr. Robert Ross, President, The California Endowment

“One thing that might be helpful to think about is expanding our concept of evaluations so that we’re not just looking at a very specific point in time—for example, a policy change—but actually expanding to do the storytelling that describes the creation process that led to those outcomes.”

Alli Jernow, Program Director, Wellspring Philanthropic Fund



“The best way that we have experienced trust building [between] our board and grantees is by taking the board to see the work and the people in action. We do this all over the world. It’s complicated and expensive in some ways, but it just produces a sea change in the attitudes and the understanding of the board.”

Stephen Heintz, CEO,
Rockefeller Brothers Fund

“The [board] should not only be asking accountability questions, but also asking learning questions about what will it take [to create impact] in terms of resources, people power, conditions that need to be in place, and deeply understand that ... We’ve had a couple of board learning sessions on trust-based philanthropy, and I think what’s really helped us is to look at what our fundamental assumptions are and question the status quo, so much of which can result in harming rather than helping our partners. We’re really committed to doing very deep community engagements, including a series of 40 community conversations. There’s nothing more important to building trust than listening, deeply listening.”

Hanh Cae Yu,
Chief Learning Officer,
The California Endowment

“Our check-ins are more about the capacity and the human needs, not necessarily the work. We learn more about that at the end. The goals for each three year grant are determined by the organization, so they’re reporting on their own goals.”

Stephen Heintz, President,
Rockefeller Brothers Fund



What grantees flag:

“The multilaterals, governments, and international agencies have such restrictive frameworks and agendas, and want all this quantitative data. [When we have general support,] we can share the voices of the activists in the places where they are important for making decisions and strengthen grassroots organizations.”

Tania Turner, ED,
Fondo Semilla (Mexico)

“For many years, all of our strategic plans were either done by me with some pro bono support or an inexpensive consultant or board-led. Only now, because we have multiyear funding, do we have the resources to create a robust multiyear strategic plan and the financial plan that goes along with it.”

Monisha Kapila, Co-CEO,
ProInspire

“With our government funders, it’s a very different kind of relationship. Accountability is about showing the return on investment, how we’re keeping girls out of the system and what that cost savings is, as well as the personal stories of transformation, so that when they’re making legislative decisions, they can actually connect a face to that policy change. With our private-sector funders, it’s really about having honesty in their agenda vs. our agenda, and understanding that power relationship. With most of our private-sector funders, there was a reason they were investing in us, which may have been somewhat different, so it was important to know that. For example, one funder focused a lot on social-emotional learning, and a gender lens, and another wanted to take a model that was working and be able to expand it effectively.”

Mary Marx, CEO,
Pace Center for Girls

“[When a funder gives us money for one year, they] narrow the impact [we can report]. So we started saying to one-year agreements, ‘Look, if I can report broadly what all the funding for this initiative has done, including your contribution, it’s much better. It gives you a better story than just a small project.’ So that itself, by reporting broadly, has actually attracted other funders. But most importantly it convinces our donors that actually staying longer can even have more impact. Maybe something did not work out in the first year, but the second and third year it worked out.”

Julius Mukunda, ED,
CSBAG (Uganda)

“I’ve been surprised to see a disparity in the reporting requirements of some donors for grantees with African leaders versus those with leaders based in North America. Leaders that come from positions of privilege or power may feel more comfortable saying no to cumbersome requirements, but organizations that have been historically under-resourced have less ability to push back on donors. Given this, how can we ensure that the reporting burden is equitable for all organizations?”

Lisha McCormick, ED,
Last Mile Health

Getting Started:

Boards:

Invite grantees to come share their work at board meetings, OR bring the board to their work in ways that don't interfere with its implementation. Discuss the findings of [Project Streamline](#) in your next board meeting.

CEOs:

Change policies so that grantees can submit reports prepared for other foundations, or substitute phone calls for written reports. Embrace a common report shared with peer funders working on similar issues.

Programme officers:

Work with peer funders supporting the same organizations to agree on a common, simple reporting format OR substitute phone calls / Zoom calls for written reports. Give grantees freedom to tell their highest-impact story, unfettered by prescribed questions and word counts.

Grantees:

Tell the longer story when reporting on a project (the broader goals, interventions, and impact) to inspire your funder to broader thinking and support.

Additional Resources:

- [Project Streamline: Drowning in Paperwork, Distracted from Purpose](#), collaborative report on how to make grantmaking processes more efficient for both funders and grantees
- ["Smart Money,"](#) SSIR article by the Hewlett Foundation president about how to combine unrestricted grantmaking with accountable, strategic philanthropy
- ["10 things progressive funders must learn from conservative ones, or we are all screwed,"](#) blog post by Vu Le of Nonprofit AF
- ["Building Equitable Evidence: It's Time to Look to Participants as Experts in Their Own Experience,"](#) Center for Effective Philanthropy article on making program participants full partners in evaluation

Data Highlights:

- Nonprofit leaders rated grantee accountability the number four barrier to more flexible funding (Accelerating Equitable Grantmaking Survey, MilwayPLUS, November 2021, n=30).

No. 5 Barrier: Bureaucratic Roles and Systems

The challenge:

A final major barrier to multiyear, flexible funding by funders and nonprofits are the gear-works of funders themselves: staff roles that exist to shape and restrict grants as part of due diligence, grant management systems that make it hard for program officers to structure grants across multiple years and gather interim feedback. Indeed, we found smaller foundations with fewer staff tended to grant more general operating support, if only because they lacked personnel dedicated to grant structuring.

Funder solutions that nonprofits support:

1. **Define program officer and other staff roles in service of grantees.** Our survey of leaders of nonprofits and funders rated service orientation (responsiveness), inclusion (open door/Zoom room), and networking assistance as top criteria for program officers. They also found program officer understanding of the nonprofit sector to be more important than subject expertise.

Who's doing it? [William and Flora Hewlett Foundation](#)
(See: [Seven Habits of Excellent Work with Grantees](#))
[Overdeck Foundation](#)

2. **Make follow-on funding easy.** Especially during COVID lockdown, funders began making follow-on grants automatic upon receiving an email or call from grantees, constituting a step toward multiyear funding.

Who's doing it? [Oak Foundation](#)

3. **Think of grants management as customer relationship management.** Funders serious about serving grantees equip their grants management systems to capture conversations with them about needs, goals, what they feel success looks like.

Who's doing it? [Foundation for a Just Society](#)

What grantmakers say:

“Philanthropy has treated grantees terribly from a customer service standpoint. But, once you see your grantee partners as part of a critical, durable foundation for social change, you’re just not in a relationship with a single grantee. You’re in a relationship with an ecosystem of partners.”

**Dr. Robert Ross, CEO,
The California Endowment**

“We borrowed best-in-class insights from peers and rewrote program officer job descriptions to be ... stewards of change and the grantee experience.”

**Anu Malipatil, VP,
Overdeck Family Foundation**

“One of the things we’ve been doing for years is asking potential grantees to send us proposals they have written for somebody else. That seems to work because other [funders] ask really good questions and you can find out a lot of information without asking applicants to revisit it.”

**Lisa Wiersma, ED,
IMC Foundation**

“My predecessor came from the nonprofit sector and initiated multiyear funding. She said, ‘Where would you prefer we have organizations spending time: focused on the work itself or focused on raising the dollars to support the work?’”

**Tracy Sawicki, ED,
Peter and Elizabeth Tower Foundation**

“MacKenzie Scott shows a commitment to not micro-managing and getting the money out there in a meaningful way that I really applaud. It’s a ‘No bull, I’m serious about giving money away, and I’m not just going to wait until I build a bureaucracy to do it.’ The truth is, there are different barriers that we throw up—we have an application process, a vetting process, a whole bunch of processes. We haven’t done everything we can to interrogate our processes and figure out how to right-size the process to the type of funding that we’re trying to do. But one thing we’ve been doing for certain grantees: We’ve been allowing the program officer to tee up a new award as an amendment on an existing grant ... We can really lighten the paperwork.”

**John Taylor, President,
Wellspring Philanthropic Fund**

“We don’t have much time for tick-the-box approaches to grant-making. We said to the board: ‘We would be able to do much more substantive work, that would engage you with what’s going on out there, if we didn’t have to do all this bureaucracy.’ So it was an argument that, ‘We can be a better funder if you are reading, dialoguing, meeting grantees and stakeholders more often.’”

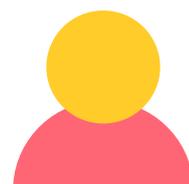
**Audrey Elster, ED,
Raith Foundation (South Africa)**

“In all our collaboratives we request joint reporting, before any money changes hands, so we are not going to look at our little pieces of a big project, but what is the purpose we are funding.”

**Naghma Mulla, CEO,
EdelGive Foundation (India)**

“Funders who hire staff at all functions and levels who have lived experience in the geographies and with the communities with which we focus have made a big difference in being able to accelerate the multiyear, flexible funding conversation. In part, because it allows authentic engagement—staff and board members that bring lived experience and a deep connection to the communities we fund, which can often build trusting relationships with grantees that are rooted in honesty and a spirit of openness. A second issue related to bureaucratic systems: Many groups that we’re working with don’t have equivalency determination, so technically we can’t give them general operating support. Offering support to grantee partners to get equivalency determination, helping them to navigate that process, and paying for the process is one important way to remove that barrier, so that’s something we’ve been trying to do.”

**Nicky McIntyre, CEO,
Foundation for a Just Society**



What grantees flag:

“The foundations where we have the most trust are those where we’ve got relationships that have been built around an openness or clarity about what we each can do (what our respective roles are in partnership). In many cases, that comes down to program officers who have a clear understanding of what they’re capable of doing within the organizations that they’re in and are straightforward with us about that.”

**Andrew Kassoy, CEO,
B Lab**

“Our grant from MacKenzie Scott has been a game changer because right now we are thinking of other kinds of programs that we can do in the next year, and other kinds of investments to help support the movement here in Mexico. We have been having conversations with other donors too, so it is transforming into a funding lever for us.”

**Tania Turner, ED,
Fondo Semillas (Mexico)**

“One process revamp we’ve made is we’ve started offering follow-on funding for our alumni to get another gift from Echoing Green after the fellowship. We don’t make them redo their application at all. They just say they want to apply again and they can reuse the same content.”

**Joanna Helou, Chief of Staff,
Echoing Green**

“We look out for trust itself. Do you trust that I will manage the program and funds well? Or you are giving me a contract that has so many dos and don’ts, I’m almost on trial. Can I purchase a glass, or must I first seek permission, attach documentation, so you can look at everything before you can allow me to buy a glass?”

**Julius Mukunda, ED,
CSBAG (Uganda)**

“Foundations need to be more thoughtful about who they bring into program officer roles. Do they have any relevant implementation background or ‘doer’ experience?”

**Matt Forti, Managing Director,
One Acre Fund**



Getting Started:

Boards:

Ask your CEO what they are doing to ensure that program officers are focused on grantee service and meeting grantee needs. Discuss the [Seven Habits of Excellent Work with Grantees](#) at your next board meeting.

CEOs:

Ensure that program officer job descriptions and evaluation processes focus on how well the program officer does at supporting grantees and meeting their needs. Ask your program officers for ideas on how to simplify the grantmaking process. Set up a time to workshop the process together and make it simpler and more efficient.

Programme officers:

Ask your grantees for feedback on how much time each element of your grantmaking process takes them. Assess which steps are most time-consuming and identify how to simplify.

Grantees:

Let your program officers know what services you value most. Point out where their processes create bureaucratic thickets. Cite examples of funders with whom you've experienced less bureaucracy and more trust.

Additional Resources:

- [Seven Habits of Excellent Work with Grantees](#), Hewlett Foundation guide for foundation staff to help them create strong, mutually respectful and highly productive relationships with grantees
- [Funder Practices for Transformative Partnership](#), Muso's recommendations for funders that seek transformative relationships and impact

Data Highlights:

- Nonprofit leaders rated funder staff concerns the number five barrier to more flexible grantmaking, and grant management systems as the number five barrier to more multiyear grantmaking (Accelerating Equitable Grantmaking Survey, MilwayPLUS, November 2021, n=30).

About the research

Research “Funnel”

43 interviews with leaders of nonprofits, funders and intermediaries to **surface a short list** of MYFF barriers and enablers

30 surveys by nonprofits (15) and funders (15) CEO's/EDs to **rate the importance** of MYFF barriers and enablers

24 focus group participants (50% funder/50% nonprofit leaders) to **agree practical means** to shift behaviour

Researchers Katie Smith Milway and Amy Bates Markham of [MilwayPLUS](#) thank the following study participants for their candor and insights, and the Ford Foundation for supporting the work.

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EdelGive Foundation, India
John Taylor, President,
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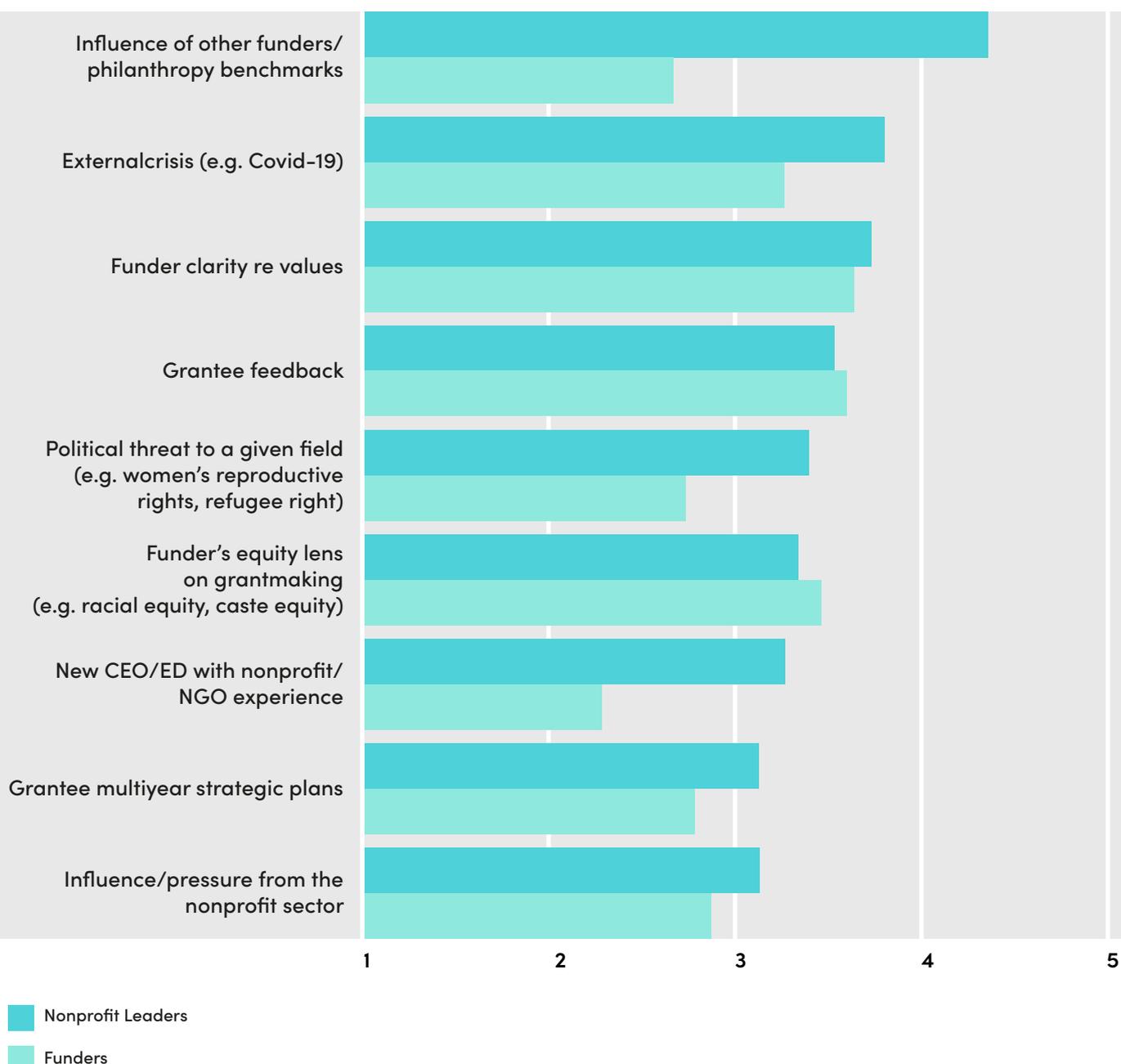
*Focus group participants

Highlights from Survey Results

In October–November 2021 [MilwayPLUS](#) interviewed, surveyed, and conducted focus groups with 30 funders and nonprofits that had significantly increased their percentage of multiyear, flexible funding over the past decade. In the survey, 15 funders and 15 nonprofit leaders each rated the importance of a set of accelerators and barriers on a scale of 1–5. The results were used to select and rank the accelerators and barriers included in this tool kit.

Accelerators:

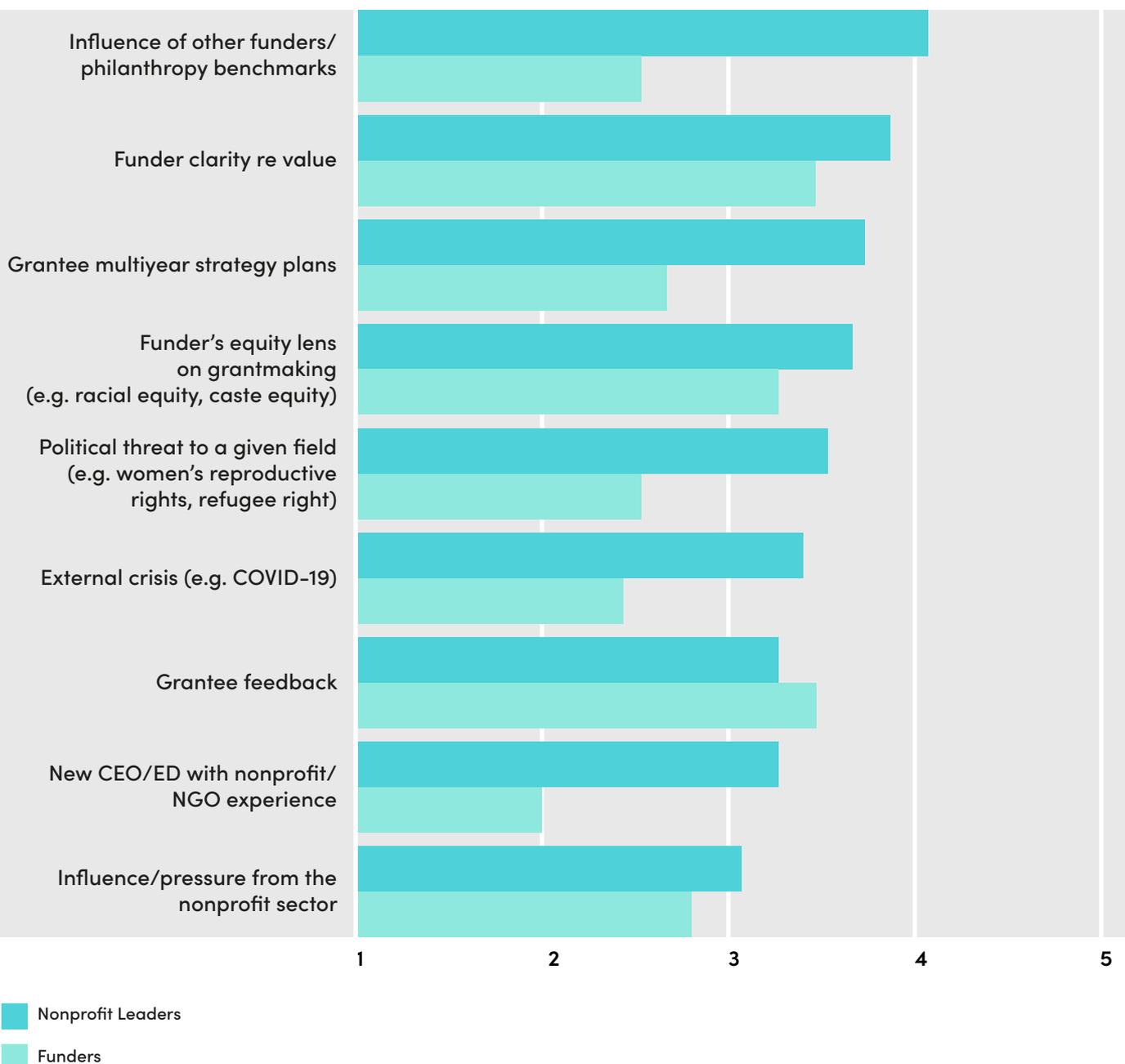
Enabling factors for unrestricted grants



Highlights from Survey Results

Accelerators:

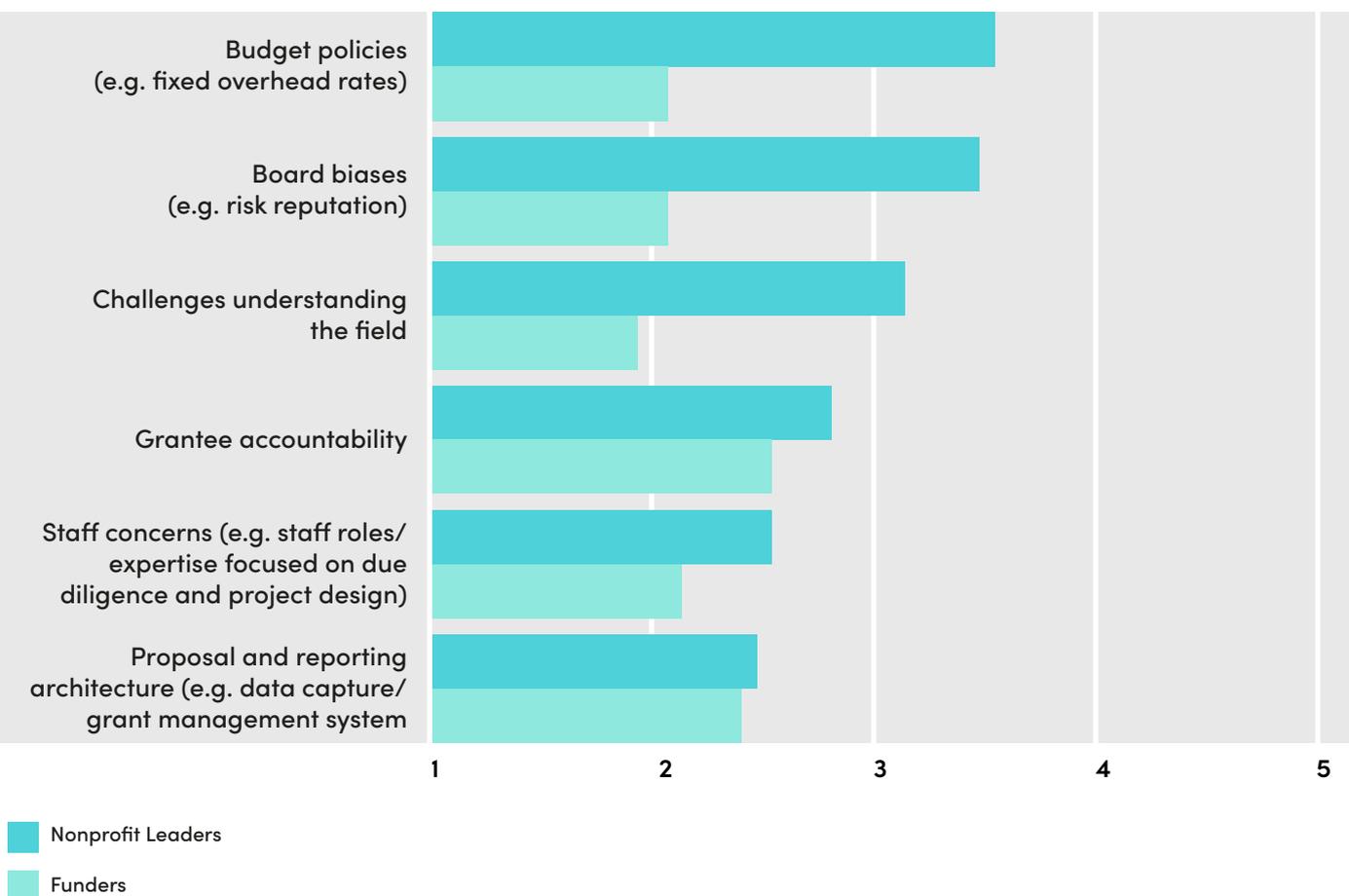
Enabling factors for multiyear grants



Highlights from Survey Results

Challenges:

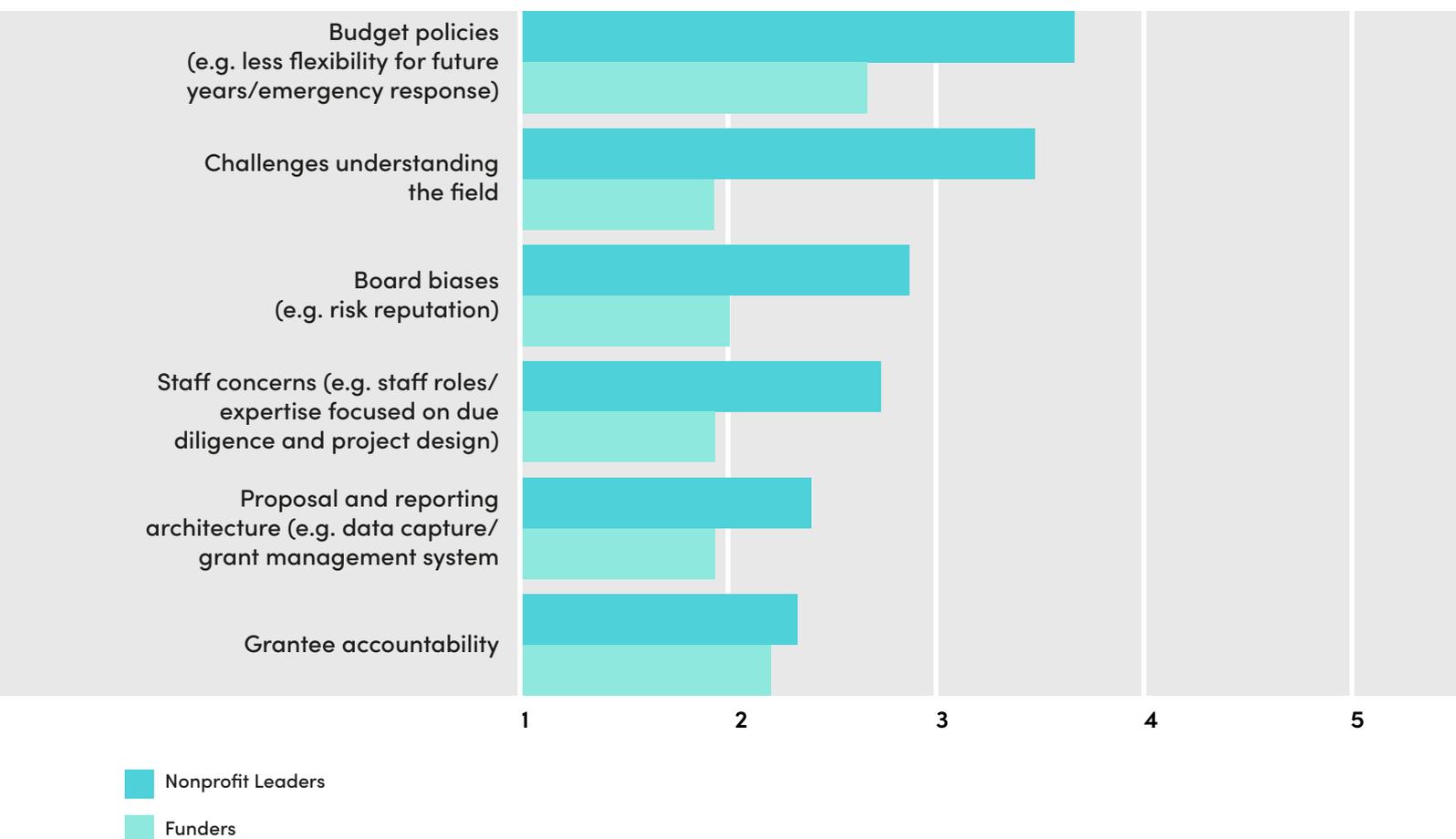
Challenges to making grants less restrictive



Highlights from Survey Results

Challenges:

Challenges to making grants multiyear



Selected Resource List

Year	Title	URL
2021	The Systems Work of Social Change: How to Harness Connection, Context, and Power to Cultivate Deep and Enduring Change, by Cynthia Rayner and François Bonnici	https://global.oup.com/academic/product/the-systems-work-of-social-change-9780198857457?cc=us&lang=en&
2021	"My Organization Is a Testament to Why Unrestricted Funding Matters," Philanthropy	https://www.philanthropy.com/article/my-organization-is-a-testament-to-why-unrestricted-funding-matters?cid2=gen_login_refresh&cid=gen_sign_in
2021	"Endow Black-Led Nonprofits," Bridgespan, SSIR	https://ssir.org/articles/entry/endow_black_led_nonprofits
2021	"Building Equitable Evidence: It's Time to Look to Participants as Experts in Their Own Experience," CEP	https://cep.org/building-equitable-evidence/
2021	"Advancing Equity Through Feedback," Fund for Shared Insight and Leap of Reason Ambassadors Community	https://www.leapambassadors.org/ambassador-insights/advancing-equity-through-feedback/
2021	"How Listening to Constituents Can Lead to Systems Change," SSIR	https://ssir.org/articles/entry/how_listening_to_constituents_can_lead_to_systems_change#
2021	"Funder Practices for Transformative Partnership," Muso	https://drive.google.com/file/d/1ITZHI-GkA3-uxoupliAAplBR6U1PCSaG/view
2021	"Building Long-Term Partnerships with Nonprofits to Scale Impact," Philanthropy New York	https://philanthropynewyork.org/news/building-long-term-partnerships-nonprofits-scale-impact-lessons-sustained-funding-relationships?u

Year	Title	URL
2021	"Collective Good: Recommendations for Philanthropy on Racial Solidarity and Asian American, Native Hawaiian, and Pacific Islander Communities," AAPIP	https://aapip.org/resources/collective-good/
2021	"Funders: Here's a Tool to Make Your Grantmaking More Equitable," Equitable Grantmaking Continuum	https://nonprofitaf.com/2021/03/funders-heres-a-tool-to-make-your-grantmaking-more-equitable/
2021	OVERLOOKED (Part 1): Foundation Support for Asian American and Pacific Islander Leaders and Communities, CEP	https://cep.org/portfolio/overlooked-part-one/
2021	OVERLOOKED (Part Two): Foundation Support for Native American Leaders and Communities, CEP	https://cep.org/portfolio/overlooked-part-two/
2021	"[Proposal forms are] 39% similar; how can we be exponentially better?" Fix the Form Project, Candid	https://blog.candid.org/post/were-39-percent-similar-how-can-we-be-exponentially-better/ Video https://www.youtube.com/watch?v=b0taGLLM9vk
2021	"Building Strong, Resilient NGOs in India: Time for New Funding Practices," Bridgespan	https://www.bridgespan.org/insights/library/pay-what-it-takes/funding-practices-to-build-strong-ngos-in-india
2021	Foundation Response to Crisis: Lasting Change?, CEP	https://cep.org/wp-content/uploads/2021/11/CEP_Foundations-Respond-to-Crisis-Lasting_Change.pdf
2021	Mismatched: Philanthropy's Response to the Call for Racial Justice, PRE	https://racialequity.org/mismatched/
2021	Seeking to Soar: Foundation Funding for Asian American and Pacific Islander Communities, AAPIP	https://aapip.org/wp-content/uploads/2021/07/seeking_to_soar_foundation_funding_for_aapi_communities_1.pdf
2021	"Resources on Equity, Diversity, and Inclusion—Where Do I Start?," Change Philanthropy	https://change philanthropy.org/resource-hub/
2020	"Funders, this crisis is the time to significantly increase funding for advocacy and community organizing, not cut down on it," blog post by Vu Le of Nonprofit AF	https://nonprofitaf.com/2020/05/funders-this-crisis-is-the-time-to-significantly-increase-funding-for-advocacy-and-community-organizing-not-cut-down-on-it/
2020	"Building a Trust-Based Philanthropy to Shift Power Back to Communities," Beeck Center, SSIR	https://ssir.org/articles/entry/building_a_trust_based_philanthropy_to_shift_power_back_to_communities#

Year	Title	URL
2020	"A Call to Action: Philanthropy's Commitment During COVID-19," Council on Foundations	https://www.cof.org/news/call-action-philanthropys-commitment-during-covid-19
2020	Making It Happen: A Conversation Guide, CEP-MY GOS	https://cep.org/portfolio/making-it-happen-a-conversation-guide/
2020	"Philanthropy Needs a New Playbook to Fund Systems Change," Ashoka	https://www.philanthropy.com/article/philanthropy-needs-a-new-playbook-to-fund-systems-change/
2020	Seven Habits of Excellent Work with Grantees, Hewlett	https://hewlett.org/library/seven-habits-of-excellent-work-with-grantees-guide/
2020	"Racial Equity in Philanthropy: Closing the Funding Gap," Bridgespan	https://www.bridgespan.org/special-collections/racial-equity-in-philanthropy
2020	Grantmaking with a Racial Justice Lens, PRE	https://racialequity.org/wp-content/uploads/2020/01/GWARJL_15.pdf
2020	"In the Struggle for Racial and Economic Justice, Don't Forget Rural America," NPQ	https://nonprofitquarterly.org/in-the-struggle-for-racial-and-economic-justice-dont-forget-rural-america/
2020	New Attitudes, Old Practices: The Provision of Multiyear General Operating Support, CEP	http://cep.org/wp-content/uploads/2020/11/Ford_MYGOS_FNL.pdf
2020	Making the Case: Foundation Leaders on the Importance of Multiyear General Operating Support, CEP	http://cep.org/wp-content/uploads/2020/10/CEP_MYGOS_Profiles_FNL.pdf
2019	"The Power of Feedback" article collection, SSIR	https://ssir.org/power_of_feedback
2019	Influencing Funder Practice, Ford Foundation	https://www.fordfoundation.org/work/learning/research-reports/influencing-funder-practice/
2019	"Ignite the Power of Your Philanthropy for Equity and Justice," NCRP	https://www.ncrp.org/initiatives/power-moves-philanthropy
2019	"Funders, you want to help build organizational capacity? Then stop trying to build organizational capacity and just give Multi-Year General Operating Dollars (MYGOD!)," blog post by Vu Le of Nonprofit AF	https://nonprofitaf.com/2019/06/funders-you-want-to-help-build-organizational-capacity-then-stop-trying-to-build-organizational-capacity-and-just-give-multi-year-general-operating-dollars-mygod/

Year	Title	URL
2018	"10 things progressive funders must learn from conservative ones, or we are all screwed," blog post by Vu Le of Nonprofit AF	https://nonprofitaf.com/2018/12/10-things-progressive-funders-must-learn-from-conservative-ones-or-we-are-all-screwed/
2018	"Funding Feedback," Fund for Shared Insight, SSIR	https://ssir.org/articles/entry/funding_feedback
2018	2018 Annual Tracking Report, Funders for LGBTQ Issues	https://lgbtfunders.org/research-item/2018-tracking-report
2018	The 2018 Diversity Among Philanthropic Professionals Report, Funders for LGBTQ Issues	https://lgbtfunders.org/research-item/2018-dapp-report/
2018	We Need to Change How We Think: Perspectives on Philanthropy's Underfunding of Native Communities and Causes, First Nations Development Institute	https://www.firstnations.org/publications/we-need-to-change-how-we-think-perspectives-on-philanthropys-underfunding-of-native-communities-and-causes/
2018	Executive Summary: Growing Inequity: Large Foundation Giving to Native American Organizations and Causes—2006–2014, First Nations Development Institute	https://www.firstnations.org/publications/executive-summary-growing-inequity-large-foundation-giving-to-native-american-organizations-and-causes-2006-2014/
2018	"Resetting the Grantee–Grantor Relationship," Forti/Peery, SSIR	https://ssir.org/articles/entry/resetting_the_grantor_grantee_relationship
2017	"Time to Reboot Grantmaking," Etzel/Pennington, SSIR	https://ssir.org/articles/entry/time_to_reboot_grantmaking
2016	"Pay-What-It-Takes Philanthropy," Queenan/Etzel/Prasad, SSIR	https://ssir.org/articles/entry/pay_what_it_takes_philanthropy
2015	The Out in the South Initiative, Funders for LGBTQ Issues	https://lgbtfunders.org/research-item/out-south-initiative/
2013	New Gatekeepers of Philanthropy, NPQ	https://cdn2.hubspot.net/hubfs/407546/Downloads/Digital_Magazine_Issues/Summer%202013.pdf
2010	Philanthropy in a Recession, NPQ	https://cdn2.hubspot.net/hubfs/407546/Downloads/Digital_Magazine_Issues/Fall%202010.pdf
2009	"The Nonprofit Starvation Cycle," Gregory/Howard, SSIR	https://ssir.org/articles/entry/the_nonprofit_starvation_cycle
2008	Drowning in Paperwork, Distracted from Purpose, PEAK Grantmaking	https://www.peakgrantmaking.org/resource/drowning-in-paperwork-distracted-from-purpose/

Year	Title	URL
2008	"Assessing the Impact: General Operating Support," GEO	https://www.geofunders.org/resources/assessing-the-impact-general-operating-support-volume-2-684
2007	"General Operating Support: Action Guide," GEO	https://www.geofunders.org/resources/general-operating-support-action-guide-690
2006	"Listen, Learn, Lead," GEO	https://www.geofunders.org/resources/listen-learn-lead-grantmaker-practices-that-support-nonprofit-results-742
2005	"The Looking-Glass World of Nonprofit Money," Miller, NFF	https://nff.org/commentary/looking-glass-world-nonprofit-money
2004	"Axis of Ideology: Conservative Foundations and Public Policy," NCRP	https://www.ncrp.org/publication/axis-of-ideology
2004	Lessons for Boards from the Nonprofit Overhead Cost Project, Urban Institute	https://www.urban.org/sites/default/files/publication/58171/411119-Lessons-for-Boards-from-the-Nonprofit-Overhead-Cost-Project.PDF
2003	"Smart Money," Brest, SSIR	https://ssir.org/articles/entry/smart_money
1997	Moving a Public Policy Agenda: The Strategic Philanthropy of Conservative Foundations, NCRP	https://bjn9t2lhlni2dhd5hvym7llj-wpengine.netdna-ssl.com/wp-content/uploads/2016/11/Moving-a-Public-Policy-Agenda.pdf
1992	Invisible and in Need, AAPIP	https://aapip.org/resources/invisible-and-in-need-philanthropic-giving-to-asian-americans-and-pacific-islanders/
1986	Indirect Costs: A Guide for Foundations and Nonprofit Organizations, Rand	https://www.rand.org/pubs/reports/R3376.html

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Pansexual pride flag painted on hand

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I'm With Her/Them – Protest photo

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Better Days Ahead on Concrete Floor

Photo by [Ian Taylor](#) on [Unsplash](#)

Man Standing Near Blue Wall

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People Meeting in Room

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People Sitting on Chair

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Green Catus Plant Near Green Door

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People Standing and Standing Near Trees

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Grayscale Portrait of a Man in a Button-Up Shirt

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