



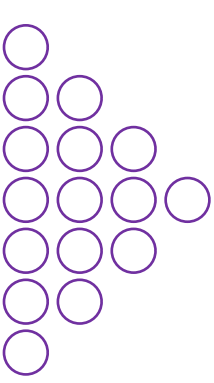
CAMPAIGNS FOR PHILANTHROPIC CHANGE

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Katie Smith Milway

Milway Consulting

Prepared for the Ford Foundation

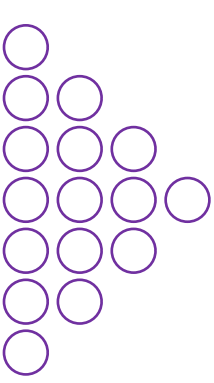


The following case studies were prepared by **Katie Smith Milway**, principal of Milway Consulting, on behalf of the Ford Foundation as part of research on influencing funder behavior. The case studies were presented on June 11, 2019, to a group of funders committed to advancing grantee-centered philanthropy. All parties cited in the profile have read and signed off on their input.

Please post any comments to [#paywhatittakes](#).

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Campaigns for Philanthropic Change

PROFILE: **BIG BETS FOR SOCIAL CHANGE INITIATIVE**
(2015 – Present)

BUDGET: Not available

Taking aim

Definition of concept

In working with hundreds of nonprofit initiatives and numerous philanthropists, The Bridgespan Group saw three related phenomena:

- 1) The impact and rarity of large philanthropic commitments for social change.
- 2) The desire of philanthropists to give away more coupled with their struggle to surface high-quality opportunities.
- 3) A trend away from building large, staffed foundations, even as philanthropic wealth increased.

To respond to these insights, Bridgespan developed a multi-year initiative to encourage bigger, fewer and longer bets on social change.

Rolled out in the fall of 2015, the effort analyzed third-party data on grants of \$10 million or more made over the prior decade.ⁱ This generated **evidence** that a) such grants fueled high-profile stories of scaling social impact;ⁱⁱ yet b) such giving often failed to match funders' stated aspirations. Indeed, the research showed that 80 percent of big bets went to museums, universities, hospitals and the like, while only 20 percent went to what 80 percent of major funders' mission statements aspired to: social change.ⁱⁱⁱ

Bridgespan published these findings in *Stanford Social Innovation Review's* Winter 2016 cover story on "Big Bets for Social Change" (which appeared November 2015), with William Foster, Bridgespan's head of consulting, as lead author and leader of the initiative. Foster received feedback

ⁱ Indiana University's "Million Dollar" List; *Chronicle of Philanthropy's* Philanthropy 50 list; Foundation Center data. Big bets from Bill & Melinda Gates Foundation excluded from set as heft would skew averages to one foundation's reality.

ⁱⁱ 90 percent of examples in *Forces for Good* had "big bets" of \$10 million or more fueling them; 70 percent of a set of 14 successful social movements had big bets behind them.

ⁱⁱⁱ Percent of Giving Pledge letters stating aspirations for social change among top three priorities vs. percent of gifts by volume going to social change (sourced from CoP, Indiana U and Foundation Center data).



that branding the initiative “Big Bets,” could indicate taking high risks with philanthropic dollars, but saw benefit in choosing a simple, memorable handle that largely captured intended meaning. The Big Bets concept targeted both doers and donors from the beginning, calling the former to develop strategic initiatives fundable at \$10 million or more, and the latter to invest in them.

Conceived as an open movement, Big Bets drove initial awareness via earned media and conference presentations to create a public narrative and debate.

Definition of success

Big Bets defined success in two ways:

- 1) Getting more funders to bet bigger and longer on a more focused set of causes in order to tip social change;
- 2) Growing nonprofits’ confidence and ability to express to their funders a “drawer-full” of opportunities to bet big on large-scale impact.

Definition of measures

Bridgespan defined a Big Bet as \$10 million or more, and tracks bets of \$25 million or more year-on-year. It wants to see the number of \$25 million-plus gifts to social change double to about 100 per year by 2025.

Taking action

Fostering learning

Advancing the Big Bets movement involved creating and sharing fact-based knowledge for different audiences, coaching both donors and doers, and cross-pollinating actors. It launched in late 2015 with a trifecta of published research, conference presentations (such as the Philanthropy Round Table, Independent Sector and TEDx Beacon Street) and earned media in mainstream and in-sector mastheads (*The New York Times* Giving Section cover feature; *Forbes.com* guest blog; *Chronicle of Philanthropy* feature; Philanthropy News Digest; and *The New York Times* Wealth column). The initiative’s leaders have renewed this cycle of research, publishing, conference speaking and press interviews almost yearly.

As of June 2019, Bridgespan had released the following waves of research with echoes in mainstream and sector media and conferences:

- November 2015–“[Big Bets for Social Change](#)” launch article in *SSIR* addressed funders and NPOs;
- April 2017–“[Ten Ways to Make a Big Bet](#),” on *SSIR.org* addressed funders;
- September 2018–“[Philanthropy Bets Big on Sustainable Development Goals](#)” – on *SSIR.org* addressed global development funders;
- February 2019 –“[Unleashing Philanthropy’s Big Bets](#)” supplement in *SSIR*. This included Bridgespan articles “Becoming Big Bettable,” for NPO leaders; and “Reimagining Institutional Philanthropy,” for foundation leaders. It also carried nine viewpoints on betting big from thought leaders such as Dan Cardinali, David Callahan, Cheryl Dorsey, Barbara Picower and Nancy Roob.



Cross-pollinating actors

The Big Bets initiative appeared to influence thinking and action within its first year. It seemed to resonate intuitively with nonprofits and funders and could point to The MacArthur Foundation's and Ford Foundation's plans to restructure their giving around fewer, bigger bets on a subset of fields as **visible examples** of the approach. A third factor turned up the volume: public debate over ranking grants by size in a given year versus over a lifecycle of funding to an organization or field.

By 2016, Bridgespan began pollinating and cross-pollinating interested funders and nonprofits. It advised family foundations seeking to reimagine their grant making as big bets, and helped aggregated fund Blue Meridian Partners (spun out from Edna McConnell Clark Foundation) to identify nonprofits with evidenced-based approaches to alleviate poverty and promote economic mobility that could achieve significant inroads if funded at scale. In 2017, Bridgespan convened institutional foundation heads for peer discussions, and the same year offered free workshops to select nonprofits poised to become big-bettable, to help them to think through their strategies and stories.

Today, Bridgespan continues to cross-pollinate interested donors and doers to share experience and opportunities that merit betting big. This has led to knowledge flows between Bridgespan clients Blue Meridian and Co-Impact; and MacArthur 100 & Change, Co-Impact and TED's The Audacious Project. In 2019 with encouragement from the Big Bets leadership team, MacArthur spun out Lever for Change, a big-bet initiative targeting philanthropists focused on a city or field.

By design, the Big Bet campaign has closely paralleled Bridgespan's client services to leaders in the field. Said Foster, "Neither the campaign alone nor the client services alone could have created sufficient momentum."

Crediting adopters

From Day One, the Big Bets initiative published lists of big bets in sector and mainstream mastheads. It launched with a list in *SSIR*; then co-created with *Forbes* magazine a Forbes List of Most Promising Big Bets, published in 2015 and 2016. In 2019, it published 2017 and 2018 lists in its *SSIR* supplement.

Results

The Big Bets initiative appears to have influenced thinking, debate and practice, yet still faces challenges to growing adoption. Signs of influence include the following:

- **Thinking and debate:** Media, foundations, nonprofits and intermediaries like FSG and Dalberg Group, rapidly picked up the moniker "big bets," (but not always with consistent definitions of grant size). Larry Kramer, president of the William and Flora Hewlett Foundation, challenged the big bet concept in print and a live debate at Stanford's Center for Philanthropy & Civil Society, further raising the initiative's profile.

- **Practice:** In parallel with the launch of Big Bets, MacArthur and Ford restructured their portfolios in 2015 around fewer, bigger initiatives. Months later EMCF announced the creation of Blue Meridian Partners, whose grants to U.S. nonprofits have ranged from \$13 million to \$60 million. In 2017, Co-Impact launched publicly with an explicit focus on making grants of \$10 million to \$50 million to promote systems change outside the U.S. Since, TED has launched its big bet initiative, The Audacious Project, and MacArthur has spun out Lever for Change.

Despite noise and activity, growth in publicly-announced U.S.-based gifts at/over \$25 million slowed: Such gifts jumped a third from 2015 (48) to 2016 (64), then crept forward in 2017 (68); and 2018 (69). If growth flattens, Foster intends to revisit the initiative's approach to promoting big bets.

Insights

Branding matters: Names should be memorable, provocative and have relevance to doer and donor audiences, alike.

Involve doers and donors to boost supply and demand as each side understands the inherently wider impact of teaming big goals with the means to achieve them.

Segmentation matters: Segment-specific research and publishing speaks to different media and audiences. Segmented convenings for different audiences (institutional and NPO) allows fit-for-purpose coaching and peer-learning.

Core support matters: Core staff support can help build a constellation of peer support: Example: Bridgespan connecting- BMP - Co-Impact -Lever for Change - 100 & Change - The Audacious Project to share knowledge and build big bet opportunities.

Dynamic constellations of practice shoot out stars: E.g. MacArthur has emergent role as curator of Big Bets for Lever for Change and Wharton Center for High Impact Philanthropy. MacArthur and The Audacious Project share opportunities.

An open narrative (no structured community/coalition) **can reach far.**

Watchouts

If you don't own the narrative it's hard to own the definition (others use the Big Bets label to apply to grants that feel large to them - \$1 million and even less. See Dalberg's 17 Big Bets or #bigbets).

Earned media may not be repeatable: Forbes shrunk page count for Big Bets list and analysis from year 1 to 2 in favor of other news, spurring Bridgespan to move list to a paid SSIR supplement.

Groundwater (sector thinking) alone can't float a movement. Creating awareness of big bettors (Forbes & SSIR lists) correlated with initial burst of growth in adoption, but not sustained growth.



Milestones

November 2015

Launch of Big Bets in SSIR article by William Foster, Gail Perreault, Alison Powell & Chris Addy. Ford and MacArthur announce they will bet bigger on fewer issues.

January 2016

Launch of Blue Meridian Partners (big bets on poverty alleviation and economic mobility).

June 2016

Launch of MacArthur 100 & Change.

November 2017

Launch of Co-Impact (international big bets in early education, economic empowerment, and global health).

April 2018

Public launch of TED's The Audacious Project.

February 2019

Launch by MacArthur of Lever for Change (nonprofit entity that will support big bet collaboratives of philanthropists around given cities or fields); Bridgespan SSIR Supplement curates multiple voices on Big Bets.

Literature sources

SSIR articles: Big Bets for Social Change (2015), 10 Ways to Make a Big Bet (2017), Philanthropy Bets Big on SDGs (2018), Unleashing Philanthropies Big Bets on Social Change Supplement (2019).

[Bridgespan Website.](#)

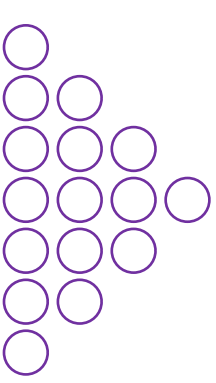
Forbes Big Bets Lists 2016, 2017.

NYT article: <https://www.nytimes.com/2015/11/08/giving/major-foundations-eager-for-big-change-aim-high.html>.

Dalberg Book: 17 Big Bets for a Better World (2017).

People sources

1. William Foster, head of consulting practice; and leader of Big Bets Initiative, The Bridgespan Group
2. Anna Verghese, Executive Director, The Audacious Project, TED
3. Cecilia Conrad, CEO, Lever for Change; and MD, 100 & Change, MacArthur Foundation
4. Katie Smith Milway, former head of knowledge practice, The Bridgespan Group



Campaigns for Philanthropic Change

PROFILE: **BLUE MERIDIAN PARTNERS** (2016 – Present)

FUND: \$1.7 Billion As Of March 2019

Taking aim

Definition of concept

With ten-plus years of experience in aggregated funds (G-Cap; True North), the Edna McConnell Clark Foundation incubated Blue Meridian Partners as a **co-investment platform** for philanthropists interested in poverty alleviation and promoting economic mobility. BMP publicly launched in January 2016 and offers co-investors sourcing and due diligence for a single, comprehensive portfolio, with flexibility in ways to engage. Meanwhile, BMP provides selected investees large-scale funding against long-term strategic plans; and tracks and reports progress against those strategic plans. Nancy Roob, CEO of EMCF and BMP, observed the benefits of this tight-loose formula for attracting investors: “The single best decision we made [at EMCF] was we did not define deal structure. [For example,] G-Cap was going to be a fund, but when we got into it, it became a syndicate.”

To build up capital, BMP leadership undertakes **one-to-one outreach** to potential co-investors, describing a multi-step investing approach for: a) identifying effective social sector leaders and strategies; b) helping these leaders to develop scaling strategies for greater, nationwide impact; c) aggregating funding from multiple investors to finance the scaling of these efforts. The latter includes:

- ***Casting a wide net** to look for strategies addressing problems faced by youth, children and families living in poverty.
- *Helping social sector leaders to **test critical assumptions** underlying investment viability and identifying potential challenges to large-scale expansion.
- ***Planning and investing upfront** to fill leadership and capacity gaps, pilot new approaches, and develop a scaling plan to prepare the organization for rapid growth.
- ***Making “big bets” of as much as \$200 million**, with flexible upfront growth capital.
- ***Supporting and monitoring performance by** pairing each investee with a BMP managing director knowledgeable in her or his field.



Definition of success

BMP defines success in at least three ways, including:

- ***Identifying and investing in successful strategies** for addressing poverty alleviation and boosting economic mobility (including strategies to improve early childhood development and learning, K-12 education, and the child welfare and juvenile/criminal justice systems).
- ***Unlocking capital** by providing philanthropists an efficient platform to quickly invest tens of millions in a specific strategy.
- ***Changing the funding paradigm for mission-driven organizations** by helping social sector leaders to seek out large, multiyear grants to back their evidence-based approaches and growth plans, in order to solve social problems at the scale they occur.

Definition of measures

In keeping with its definition of success, BMP measures whether each investee fulfills goals described in its strategic plan. It calculates financial growth of the BMP co-investment platform, currently \$1.7 billion, and its success in attracting new investors. It also promotes the rise of capital aggregation as a funding norm across the sector.

Taking action

Fostering learning

BMP's managing directors act as strategic advisors. They bring insight to investee board meetings, offer field expertise and evaluation know-how. Says one investee, Patrick Lawler, CEO of Youth Villages: "[Our managing director] has a good background in research and criminal justice, so she helps us." In addition, BMP fosters peer learning in several ways. It invites investees to join calls organized every quarter to share their challenges and progress. It also introduces investees who share common aims for informal experience sharing.

Cross-pollinating actors

BMP General Partners are able to make investment decisions in unanimity, in large part because they discuss investment ideas at length as a full group before anything comes to a vote. These discussions draw in thinking from non-voting "impact" partners who also have exposure and access to Blue Meridian's investment insights and senior leadership. Beyond that, BMP's leadership is in constant communication with potential new investors and aspiring emulators of aggregated funds. For the latter, BMP has contributed ideas to co-investment platforms founded since 2016 such as: [Co-Impact](#), [TED's The Audacious Project](#), [Lever for Change](#) (affiliated with MacArthur) and [The Collaborative Fund for Women's Safety & Dignity](#) (housed at Rockefeller Philanthropy Advisors). BMP has also joined a group of leaders of aggregated funds from around the world led by the Bill and Melinda Gates Foundation. Despite such signs of success, BMP CEO Roob observed, there is no easy way to grow the platform or the movement: "For all who have joined, we have an equal number who haven't; it's not for everyone. And our objective is to demonstrate effectiveness. Over time, we have converted skeptics who have re-upped and become happy with our work."



Crediting adopters

BMP highlights 14 current investors and 7 investees in regular press releases and website pages, including:

- Eight general partners (who invest \$50 million or more)—[EMCF](#), [Ballmer Group](#), [Stanley and Fiona Druckenmiller](#), [The Duke Endowment](#) (with a focus on North and South Carolina), the [George Kaiser Family Foundation](#) (with a focus on Tulsa, Oklahoma), the [Samberg Family Foundation](#), [Foundation of Sergey Brin](#) (Google) and [David Tepper Charitable Foundation](#)
- Six limited partners (who invest \$10 million or more): The [Aviv](#) Foundation, the Eugene and Marilyn Stein Family Foundation, the [William and Flora Hewlett](#) Foundation, The [JPB](#) Foundation, the [Bill and Melinda Gates Foundation](#), and the [Charles and Lynn Schusterman Family](#) Foundation.

Results

BMP has evidence that it has influenced both sector thinking and practice. As of June 2019:

*Eight investees have run an exacting gauntlet to develop detailed strategies to scale outcomes, and have received a first round of grants. These include: [Youth Villages](#) (\$36.1 million for four years); [Year Up](#) (\$40.5 million for four years); [Wendy’s Wonderful Kids](#) (\$35 million for four years); [Upstream](#) (\$60 million for 7.5 years); [Healthy Steps](#) (\$39 million for five years); [Nurse-Family Partnership](#) (\$56.5 million for five years); [Center for Employment Opportunities](#) (\$13.2 million for three years); [The Bail Project](#) (\$37.5 million for five years).

*The fund has grown from six general partners, four limited, or “impact,” partners and \$750 million at its 2016 public launch to eight GPs, six IPs and \$1.7 billion three years later.

*BMP has advised at least four co-investment platforms launched since its own inception and shares knowledge with many more.

Insights

Core support matters: Make it easy for funders to live into their aspirations: The BMP platform takes on nitty gritty (sourcing, due diligence, monitoring and reporting).

Define the product (investment portfolio) and flex the investment opportunities. (Investors can invest in the portfolio, or grantees within the portfolio, etc.).

Offer expertise with funding and remain a resource to investees.

Put the “co” in co-investors by talking investments through to partner consensus.

Tap into existing will to give, then build skill to give effectively.



Watchouts

Keep the goal simple (unleash more big bets for large-scale impact) **and value proposition clear** (Joining the platform will help you spend more with confidence in results; True North attempt to raise funding ahead of confirming portfolio didn't work).

Funder co-investment is taking off, but the practice is underdeveloped.

Putting \$ in a fund isn't "normal." People want to pick and choose (need to flex deal structure).

The road to ROI is painful; NPOs need time, supports – and empathy.

Aggregated funds can disintermediate NPOs from individual funders, if not careful.

Milestones

June 2017

EMCF announces G-Cap (growth capital) funds for Youth Villages, Nurse Family Partnership and Communities in Schools, totaling \$120 million. This publicly launches its new funding strategy to raise growth capital against long-term strategic plans; and to influence board members of each of these organizations to dig deep to contribute to their respective organization's long-term growth.

2011

EMCF founds the True North Fund with \$30 million from U.S. Social Impact Fund; \$30 million from ECMF, and a plan for portfolio grantees to raise a collective \$60 million match. In the end, EMCF raised the match (from Donor Advised Fund holders, foundations and others) for a portfolio of 12 grantees.

January 2016

EMCF publicly announces Blue Meridian Partners as a co-investment platform for aggregated capital from funders seeking to alleviate poverty. The fund initially aimed to raise \$1 billion, and to date has raised \$1.7 billion.

Summer 2019

Blue Meridian Partners becomes an independent entity, with EMCF transferring relevant staff and operations to Blue Meridian Partners, as part of plans to sunset EMCF.

Literature sources

Blue Meridian www.bluemeridian.org

Edna McConnell Clark Foundations www.emcf.org

Barron's article: "[How to Unleash \\$45 billion for Charity](#)"

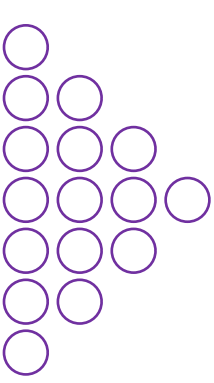
Stanford Social Innovation Review: "[Money to Grow On](#)"

[A Mid-Point Report on the True North Fund](#)



People sources

1. **Nancy Roob**, President and CEO, EMCF; CEO, Blue Meridian Partners (pioneered growth capital aggregation investment strategy)
2. **Chuck Harris**, Managing Director & Chief Operating Officer, BMP
3. **Patrick Lawler**, CEO, Youth Villages (investee)



Campaigns for Philanthropic Change

PROFILE: **D5 COALITION – “DIVERSITY IN 5 YEARS”**
(2010-2015)

BUDGET: \$8 Million

Taking aim

Definition of concept

In 2007 the Russell Family Foundation gathered more than a dozen foundation heads in Gig Harbor, WA, to discuss the state of philanthropy. The group, which included Susan Berresford, then president of Ford Foundation, and Stephen Heintz, president of Rockefeller Brothers Fund, lamented the fact that philanthropy as a field lagged society when it came to reflecting diversity, equity and inclusion (DEI). They determined to undertake a 3-year, voluntary effort, with consulting support, christened the Diversity in Philanthropy Project (DPP). The DPP would try to increase the application of DEI across leadership, grantmaking and investing. Over time, the group concluded they needed a more effective organizing mechanism, involving both funders and philanthropic infrastructure groups. This led the DPP coalition to found a follow-on initiative in 2010 called the D5 Coalition, aimed at achieving greater philanthropic diversity in five years.

D5 was co-chaired by Heintz, Dr. Robert Ross, head of The California Endowment, and Sterling Speirn, then head of the W.K. Kellogg Foundation, who was later succeeded as co-chair by Luz Vega-Marquis head of the Marguerite Casey Foundation. They hired Kelly Brown as executive director. Brown, with a skeleton crew of one assistant and two program consultants, worked with founding funders and five select infrastructure organizations to move the DEI conversation mainstream and provide tools to convert talk to action. As the movement grew, many types of funders signed on, including large and small foundations, individual donors, and regional and national associations of grant-makers, all pledging to increase staff diversity and boost funding flows to more diverse populations.



Definition of success

D5's definition of success was expansive: to make philanthropy: 1) more diverse, with more staff and trustees from historically underrepresented groups; 2) more equitable, by promoting justice, impartiality and fairness within the procedures, processes and distribution of resources by institutions or systems; and 3) more inclusive, by enabling diverse individuals to participate fully in their organization's decision-making.

Definition of measures

Given a broad definition of success, D5 planned to gather data on multiple outcomes:

- *Recruitment of diverse leaders for foundations (via tracking successors).
- *Identification by funders of best ways to advance DEI in their own organizations (via funder surveys).
- *Increase in funding for diverse communities (via tracking funding flows).
- *Improvement of data collection and transparency (via creating a database on organizational diversity.)

Taking Action

Fostering learning

The D5 leadership team analyzed policies, practices, and programs that had influenced funders to integrate DEI in their work, and shared findings with interested organizations via professionally produced videos, webinars, workshops, and conferences. Specifically:

- D5 researched and encouraged use of population-focused funds—funds established by and for members of a community to address issues specific to the community.
- D5 studied and promoted best practices for funders to collect demographic data, aligned with existing data collection, and strove to increase funders' commitment to adopting these practices.

Cross-pollinating actors

D5 leadership collaborated with an advisory group of philanthropic infrastructure organizations, HR executives, and consultants in communications (Hattaway Communications), evaluation and executive search to create and use tools to increase DEI practice, craft messages to influence adoption, and develop a strategy to increase demand for diverse leaders. Its original infrastructure advisors consisted of The Foundation Center (rebranded Candid in 2019), Council on Foundations, Forum of Regional Associations of Grantmakers (rebranded United Philanthropies Forum in 2017), Joint Affinity Groups (rebranded Change Philanthropy in 2016) and representatives from a network of population-focused funds. Broadening the coalition from funders in and of itself raised greater awareness. But unclear decision-making structure along with unequal grant incentives for the infrastructure advisors created complexity in expanding the group. This led to tough conversations the first year to agree on process, which slowed momentum without finding consensus. Ultimately, D5 leadership clarified that advisors would make recommendations versus decisions.



Crediting adopters

D5 designed a public campaign to encourage and credit adopters called “Take Five,” whereby funders would identify, undertake and report five actions promoting DEI. Unfortunately, it fell short. For one, D5 lacked resources to launch the campaign externally. For another, when D5 asked representatives of foundations to make a Take Five pledge to share demographic data and use DEI tools, representatives didn’t feel empowered to sign for their organizations. Meanwhile, some prominent foundations including Ford and W.K. Kellogg did appoint diverse leaders over the course of DPP/D5, and others, like RBF, worked hard to diversify staff and trustees.

Results

D5’s final evaluation, released two years after the initiative closed in 2015, found evidence that D5 did raise DEI awareness and aspirations, but found little data on changes in practice. Perhaps in part this was due to lack of resources to mount a public campaign, but also, according to Brown, only philanthropic leaders can be persuaded by each other to change. “Influence in philanthropy is the social capital of the philanthropic leaders – not the platform they fund or programmatic efforts,” said Brown.

Interestingly, national movements like #blacklivesmatter and #metoo arose even as D5 shuttered, and their news value moved DEI high on the radar of all organizations, including those in the social sector. By 2016, Kellogg had launched a DEI sector-strengthening initiative, and DEI was foremost on the agenda of major conferences, including Independent Sector. Intermediaries like The Bridgespan Group and FSG put DEI at the center of culture change.

Among measures D5 envisioned at the outset, the initiative’s final evaluation drew mainly on two: self-reported data from participant surveys to gauge change in thinking and practice, and website downloads to gauge interest in specific themes and tools. Meanwhile, data on “inclusion” proved elusive. Ultimately, D5 created a roster of the willing and tools to skill them, but underestimated the timeline, cost and public pressure required for deep culture change. Specifically, D5:

- Grew its coalition from original five infrastructure groups to 27.
- Developed tools to engage key audiences, and drew coalition members into conversation through 266 events over five years to help the field become more strategic in messaging the importance of DEI.
- Developed a system, launched in 2014, to collect demographic data through a partnership with GuideStar (since merged with Foundation Center and rebranded Candid); by 2016 it had logged data from 7,000 organizations, including 250 foundations.
- Influenced organizations, such as Meyer Memorial Trust, to use demographic data to redesign their grantmaking process. Indeed, a 2015 Foundation Center survey found that 10 percent of funders had changed their goals, policies and grantmaking related to serving people of color, up from 5 percent in 2008.
- Identified gaps in the D5 approach and means to address them. This led D5 co-chairs to create a successor project, called D5 Compass, to influence trustees, which Kelly Brown supports as a consultant.



Insights

Branding matters (D5 defined “DEI” as a practice for its successors.)

Segmentation matters (D5 analyzed word choice for different funder audiences in shaping messaging – and found some more responsive to “diversity,” others to “inclusion,” etc. and modified point of entry to DEI accordingly.)

Design for DEI (Inclusion only feels like inclusion when it comes at the start.)

Living databases perpetuate legacy (Guidestar’s expanding demographic database could provide means for DEI analysis for years to come.)

Watchouts:

Keep the goal simple and value proposition clear. The more expansive the definition of success, the harder it is to measure: e.g. finding reliable data on inclusion; analysis of funding flows and so forth, eluded D5.

A coalition of the willing doesn’t guarantee a coalition of the acting. (D5 amassed 5,300 pledges to prioritize DEI, but found few changed their behavior.)

Decision rights matter (D5 leadership spent a great deal of time with infrastructure groups to figure out a group decision-making process, but never arrived at consensus.)

Paying for participation may be necessary AND can distort it. (An unequally dispersed grant pool affected participation of the initial infrastructure groups.)

Test for perceived power imbalances between funders and grantees and address them at outset (D5 infrastructure organizations had less access to power and decision making authority; after a reset, their role clarified as making recommendations versus. decisions.)

Milestones

2010 D5 launches five-year initiative.

2014 Guidestar launches effort to gather demographic data.

2015 D5 concludes the initiative.

2016 D5 releases its final “State of the Work” report. Guidestar logs DEI data from 7,000 organizations including 250 funders.

2017 D5 releases its final evaluation; D5 co-chairs launch D5 Compass to influence foundation trustees.



Literature sources

D5 Coalition www.d5coalition.org

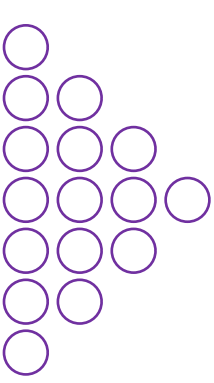
“Moving Diversity Up the Agenda: Lessons and Next Steps from DPP” [report](#)

D5 final “State of the Work” [report](#)

D5 2010-2015: Expanded Momentum for Diversity, Equity, and Inclusion (final evaluation and learning report).

People sources

1. Kelly Brown, Director of D5 initiative
2. Stephen Heintz, CEO Rockefeller Brothers Foundation and D5 Co-Chair
3. Carly Hare, ED of CHANGE Philanthropy and D5 infrastructure advisor
4. Jessica Bearman, Principal of Bearman Consulting, co-designer of DPP



Campaigns for Philanthropic Change

PROFILE: **FULL COST PROJECT** (2015–2018, Phases I & II)

BUDGET: \$750,000

Taking aim

Definition of concept

In 2015, the Weingart Foundation engaged an alliance of three, regional grantmaker associations in California to launch a statewide initiative related to a national movement for funders to prioritize general operating support and cover the full costs of outcomes. Christened the “Real Cost Project,” Northern California Grantmakers’ interim director David Greco played a sparkplug role working with Southern California Grantmakers (SCG) and San Diego Grantmakers (SDG). In Phase II the initiative rebranded itself the Full Cost Project, and Nonprofit Finance Fund (NFF) became a formal partner.

Managed by Kate Seely at NCG in concert with her peers at SCG, SDG, and NFF, the Full Cost Project has sought to coach funders on the why and how of computing full costs for their grantees (defined as all costs required for a nonprofit to deliver on mission and to be sustainable). It also seeks to shift the cultures of California funders toward embracing full cost thinking and practice as part of the way they work.

Early supporters of the project beyond Weingart included the David and Lucile Packard Foundation, and the William and Flora Hewlett Foundation, which were later joined by the Parker Foundation, the Ralph M. Parsons Foundation, California Community Foundation, First 5 LA, and the James Irvine Foundation. Phase I (2015 through 2016) focused on understanding the opportunities and barriers to adopting a full cost approach. In Phase II (2017 through 2018), NFF delivered workshops to trustees, C-suite foundation leaders, program staff, and nonprofit staff and board members, to build skills around how to calculate the full cost of delivering outcomes. With doers and donors both in the room NFF also workshopped means to hold effective conversations between nonprofits requesting grants to cover the full costs of program interventions (including hidden costs) and philanthropists responding to those requests.



Definition of success

The initiative aimed both to spur adoption of full cost practices and to build relationships between California foundations and regional associations. Phase I goals included drawing feedback from funders and nonprofits on the issues related to full costs, then conducting briefings with foundation trustees and CEOs to build a shared understanding of the concept and its calculation. Phase II success lay in equipping nonprofit leaders and foundation program staff with the tools to calculate full costs and facilitating candid conversations around the ask and response. It also looked to spark “get started” practices, such as releasing follow-on grant payments without requiring a prior tranche be spent down, in order to let nonprofits build operating cushion.

Specific participants had companion goals: For NCG, the initiative offered an opportunity to engage peer associations in statewide collaboration around improving nonprofit outcomes by changing funder behavior. For California-based national and international foundations, it created opportunity to plug California’s initiative into a national conversation led by the Independent Sector about nonprofit support; and an international conversation among five global grant makers (including Packard) on indirect cost coverage, called “The True Cost Collaborative.”

Definition of Measures

The Full Cost Project measured outputs by surveying participating trustees, CEOs, and nonprofit executive teams to understand the skills they acquired, including an ability to explain full costs, use tools to communicate full costs, and advocate for full cost coverage. Initiative manager Seely anticipated measuring outcomes – changes in funder behavior – in a third phase of the project.

Taking action

Fostering learning

When Greco stepped down as NCG interim director, his consulting firm, Social Sector Partners (SSP), took on project support for the regional associations. Post design phase, SSP led the feedback forums in Phase I with funders and nonprofits, followed by half-day executive briefings on forum findings for funder CEOs and trustees. In Phase II, NFF offered one- and two-day trainings that brought together funder and nonprofit executives to discuss measuring the full cost of achieving outcomes and how to muster difficult conversations regarding a shift toward full cost grants. (These trainings got the highest marks.) NFF then led 90-minute briefings for foundation executives.

Cross-pollinating actors

Nonprofit leaders input into feedback forums in Phase I fed into designing workshops for Phase II two years later. However, the hiatus in nonprofit involvement disgruntled their state NPO association, CalNonprofits. Phase II kicked off with the alliance of regional associations formalizing their partnership by rebranding as Philanthropy California. They then spent two years with doers and donors on skills building, with a plan to deepen practice in a planned



Phase III. Seely cited an African proverb to explain the pacing: “If you want to go far (vs. fast), go together.” CalNonprofits leader Jan Masoaka felt this rhythm called for “a lot of money, considering the benefits,” and wondered why the largest funders of nonprofit work – federal and state governments – were not part of the conversation.

Outside the state, NCG President & CEO Ellen LaPointe represented the Full Cost Project in the Independent Sector conversation plugging Full Costs into the national movement. As of June 2019, The True Cost Collaborative remained a parallel play.

Crediting adopters

Full Cost intends to track adoption in Phase III.

Results

To date, the Full Cost Project has raised awareness within California and among its members, reaching 250 California foundation trustees, CEOs and their staffs, as well as nonprofit executives and their staffs through its workshops and training.

Survey results from nonprofit participants in Phase II of the project showed that 95 percent knew how to explain their full cost to at least one of their funders and 92 percent acquired better tools to communicate their organization’s budget to funders and program officers.

Meanwhile, 98 percent of funder participants in Phase II of the project reported increased understanding of the full cost of running a nonprofit and 97 percent had greater knowledge of the types of questions to ask a nonprofit to understand its full costs.

The challenge of changing both funder and nonprofit practice remains: It’s still difficult for California nonprofits to speak about the real costs of their work; and California philanthropists have yet to see a sea-change toward funding full costs. A third phase of Full Costs envisions tackling culture change and implementing practice.

Insights

Involve donors and doers for richest learning.

Include the boardroom and others will follow.

Measure and report out as you go vs. waiting for initiative completion.

Training nonprofits to calculate costs makes them better informed; training them to advocate for full costs can make them better funded.



Watchouts

Branding matters: The moniker “Full Cost” fell flat for nonprofits working principally with government, as government by law cannot pay service providers their “full cost.” Meanwhile, “indirect cost” (a term used by The True Cost Collaborative) felt like a red herring to “Full Cost” followers as it failed to capture other key elements of sustainability.

Design for DEI: Focusing on one segment (in this case funders) in early stage can make others (in this case nonprofits) feel like an afterthought.

Tap into existing will to have the conversation, then build skill to have it effectively. (But don't forget to move beyond skills to culture change.)

Participants may feel they have to adopt practices before drawing in others. (Some funders were reluctant to involve grantees because they hadn't adopted full cost practice themselves, versus looking at the project as a journey of co-learning.)

Don't forget to advocate with government – using the law: A one percent bump in government funding for most direct-service agencies surpasses a 10 percent bump from all their foundation funders.

Test where dollars have impact before committing budget – (Full Cost says it might have tilted more resources, earlier, toward work with nonprofits, if it had early survey data.)

Milestones

February 2015

With funding from Weingart, three California regional grantmaker associations begin baseline research on doer and donor practices in the state around funding real costs.

April 2015

Regional associations announce what they initially call the “Real Cost Project.”

June 2015

Phase I launches, hosting forums with more than 150 foundation and nonprofit staff to highlight key considerations and outcomes of full-cost funding.

Fall 2015

Regional associations offer executive briefings to share forum feedback with foundation leaders.

August 2016

Regional associations publish key findings from Phase I, and rebrand the initiative as Full Cost Project.

January 2017

Alliance of regional associations rebrands as Philanthropy California.

May 2017

Full Cost Project announces Phase II.

**Summer 2017-Spring 2018**

Full Cost held 10 co-learning workshops across the state for funders and nonprofits

November 2018

Full Cost published key findings from Phase II of project; began preparation for Phase III.

Literature sources

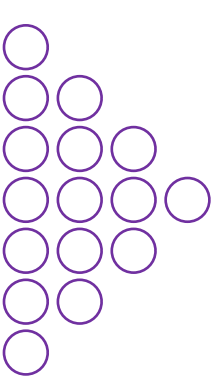
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Northern California Grant-makers website – www.ncg.org

Nonprofit Finance Fund website – www.nff.org

People sources

1. Kate Seely, Project Manager of Full Cost Project, Northern California Grantmakers / Philanthropy California
2. Linda Baker, Director for Organizational Effectiveness and Philanthropy, David and Lucile Packard Foundation (sponsor of Full Cost Project)
3. Jan Masoaka, CEO, CalNonprofits



Campaigns for Philanthropic Change

PROFILE: **THE GIVING PLEDGE** (2010 – Present)

COMMUNITY SIZE: ~200 pledgers; net worth ~\$1 Trillion

Taking aim

Definition of concept

Following Warren Buffett's decision to partner with Bill and Melinda Gates, the three engaged in many discussions about what might inspire philanthropists to give more and with greater impact. Along with Patty Stonesifer, founding Chief Executive Officer of The Bill and Melinda Gates Foundation, they vetted several ideas. They zeroed in on a pledge (championed by Buffett) for billionaires with at least four potential components: give more, give now, give smart, give to inequities. Then they took the concept to a series of dinners with leading philanthropists on the West Coast, in New York and London to test and solicit input.

Ultimately, Bill Gates, Melinda Gates and Warren Buffett launched The Giving Pledge in June 2010 on The Charlie Rose Show, NPR and in a *Fortune* article, asking billionaires to give more, commit publicly (in letters ultimately housed at the Smithsonian) and set a new norm for philanthropy. As part of the value proposition, the pledge offered benefits: 1) clarification of giving plans; 2) participation in an inspiring learning community.

Through one-to-one calls, letters and/or personal meetings, the Gateses and Buffet signed 40 pledgers by August into a coalition of the willing– those disposed to donate half or more of their wealth while living or on passing. “I had already planned to give 100 percent of my estate to charity,” said Lyda Hill, one of the original 40. “It was a slam dunk.”

Today, with the Gates Foundation's Philanthropic Partnerships team focused on onboarding pledgers, engaging them, and building up their learning community, more than 200 billionaires have pledged from 23 countries, with 86 percent of represented wealth emanating from the U.S. The Giving Pledge community has an annual retreat and about half a dozen optional learning events per year around fields (e.g. climate change) or practice (e.g. How do I get started?)



Buffet's animating question? "When will you be in the best position to make the best decisions of your life? It may be sooner than you think!" The query spurs pledgers to give more, sooner, while the public nature of the pledge puts pressure on other billionaires to follow suit and join the community (e.g. Jeff Bezos, still a hold out; and, recently, MacKenzie Bezos, pledged in 2019).

Definition of success

The Giving Pledge support team, which now is part of the Gates Foundation's Philanthropic Partnerships group, has a threefold mission.

- 1) Keep attracting pledgers (As of June 2019, 9% of global billionaires had signed on);
- 2) Help each pledger to achieve her or his impact goal by providing opportunities for learning (through peer-to-peer experience sharing, nodes of competence, or outside expertise); and by making it easy for those who share goals to meet each other.
- 3) Build a giving norm for wealthy individuals by publicizing the list of pledgers, their pledge letters, posting videos of pledger talks at givingpledge.org and investing in research and publishing that surfaces giving trends and gaps.

Definition of measures

The most concrete measure of The Giving Pledge is adoption: More pledgers keep pledging. A harder-to-calculate measure is disbursements: More pledgers give more dollars each year. The challenge? One can only publicly track foundation giving, while pledgers have many different giving structures. In addition, it can take time for the estates of deceased pledgers (e.g. Paul Allen) to settle. Tracking the impact of disbursements is harder still, currently captured via self-reported stories of change.

Taking action

Fostering learning

Pledgers like Lyda Hill say that the biggest draw of The Giving Pledge is the chance to meet peers. Learning events give focus to their interactions, including an annual meeting, the first one held at Miraval resort in Arizona, for pledgers only. Since then staff and experts have peppered peer-to-peer learning events with expert talks and facilitated discussion, while videographers tape and post a subset of talks at thegivingpledge.org for public consumption. Importantly, the learning opportunities vary in place and length to accommodate different schedules. They range from the 2-day annual retreat to half-day convenings and virtual webinars.

Finally, the Gates philanthropy team commissions research to grow both a fact-base and inspiration for sharing wealth. In 2018, for example, it asked The Bridgespan Group to conduct what became its [Four Pathways to Greater Giving](#), study, revealing low and slow payouts to charity as wealth climbs. Buffett stays engaged, prodding the community to dig deep. Said Hill: "Warren said, 'Do what other can't. Take a risk.' That really helped me in my direction."



Cross-pollinating actors

Giving pledge staff make a point of introducing kindred spirits who may want to fund the same things. Two pledgers, for example, funded Olivia Leland, the first director of The Giving Pledge, to research and found Co-Impact, a big-bet philanthropy initiative launched in 2017 that funds international systems change. Others have joined co-investment platform Blue Meridian Partners or funded TED's The Audacious Project, another big-bet initiative. While co-funding occurs, it's rare for pledgers to "hold hands and work together," said Hill. Rob Rosen, director of Philanthropic Partnerships for the Gates Foundation, today travels the world and visits pledgers to figure out how the community can better serve their interests.

The Giving Pledge stages its global outreach from Gates Foundation offices overseas. From there it reaches out to potential pledgers or pledge-like communities, for example the India Philanthropy Initiative. Broadening recruitment from U.S. to international (versus having designed for global outreach) led to a learning curve on acculturation. International outreach has taken much time, but also brought much richness to the learning community. Meanwhile, Bill Gates connects with pledgers and potentials at global forums like Davos.

Crediting adopters

Publicly crediting adopters is integral to The Giving Pledge strategy to grow its community. Thegivingpledge.org lists names of pledgers and hosts videos of them sharing expertise.

Results

Billionaires continue to take the pledge, but overall penetration remains low: The founding 40 had grown to 204 individuals, couples and families ranging in age from their 30s to 90s across 23 countries as of June 2019, or 9 percent of about 2200. U.S. billionaires, the initial target population for the pledge, account for about \$860 billion of the community's approximately \$1 trillion net worth.

The pledge is a moral commitment (no guarantee of follow through), but The Giving Pledge support team and community offer guidance on implementation: e.g. how to start a foundation or give to an existing vehicle. Large numbers of pledgers focus on climate change, education and medical research. Notable examples: Mark Zuckerberg and Priscilla Chan have donated \$3 billion to the Chan Zuckerberg initiative to fight infectious disease and \$220 million to schools in the Bay Area and Newark, NJ. Larry Ellison and the late Paul Allen created foundations in their names to donate about \$1 billion to disease research.

Insights

Keep the goal simple (give more) **and value proposition clear** (commitment to giving will help you plan; learning community will help you plan well).

Tap into existing will (to give), **then build skill** (to give effectively).



Core support matters: supply the I-Beams (onboarding, engagement, community building).

Capitalize on desire for peers to meet each other, then make the meeting meaningful.

Present opportunity versus a solicitation.

Watchouts

Design for DEI: Starting with only one segment (in this case US funders) can make others (in this case internationals) feel less urgency.

Segmentation matters: If you want to reach new cultures, you need to acculturate offering – language, learning.

It's hard to judge impact when it's not about what people give to.

A coalition of the willing does not de facto convert to a coalition of the acting (Intent gets you started, then you need mechanisms (e.g. [Four Pathways](#) article).

Milestones

June 2010

Launched The Giving Pledge;

August 2010

Announced first 40 pledgers, each committing to give 50 percent or more of their wealth to charity. Founding 40 included Bill Gates, Warren Buffett, Larry Ellison, Lyda Hill and George Lucas.

2012

Eighty-one billionaires have signed pledge, and are growing the learning community.

2015

Two pledgers fund Giving Pledge director Olivia Leland to research and cofound Co-Impact; others join Blue Meridian Partners' co-investment platform.

2019

More than 200 global billionaires have signed pledge, representing about \$1 trillion of wealth.

Literature sources

The Giving Pledge givingpledge.org

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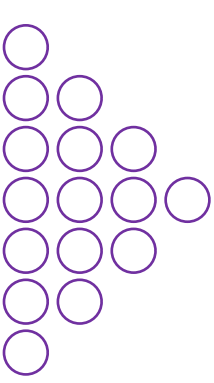


[Four Pathways to Greater Giving](#), November 2018, www.bridgespan.org.

[“Has the Giving Pledge Changed Giving?”](#) Chronicle of Philanthropy, June 2019.

People sources

1. **Robert Rosen**, Philanthropic Partnerships, Gates Foundation.
2. **Olivia Leland**, Founding Director of The Giving Pledge, now CEO of Co-Impact, nested at The Rockefeller Foundation.
3. **Lyda Hill**, LHH, Dallas, TX, a “founding 40” pledger (and 1st woman).



Campaigns for Philanthropic Change

PROFILE: **TRANSFORMATIVE SCALE COLLABORATIVE**
(2014-2018)

BUDGET: Not available

Taking aim

Definition of concept

After hearing multiple leaders of nonprofit networks lament the slog of incremental expansion, The Bridgespan Group launched a multiyear initiative to address this. It started with a 2014 *SSIR* article by Jeff Bradach and Abe Grindle titled "[Transformative Scale: The Future of Growing What Works](#)." The effort gained momentum in 2015 when Bridgespan, in partnership with Harvard Business School's Social Enterprise Initiative, created a "Transformative Scale Collaborative." The collaborative convened nonprofit leaders and funders for two, multi-day "Impact Labs" and follow-on discussions. The initiative also included research and consulting engagements, all of which fed a learning agenda.

The collaborative aimed to help leadership teams already wrestling with the limits of their growth models to build strategies and funding models that could break through and create large-scale impact. Bradach and Grindle dedicated a percentage of their time to lead T-Scale, supported by revolving Bridgespan teams. But the effort had no core staff. "It was an opportunity...to be...generative, out of actual leaders doing the work," said Bradach. By 2018, the collaborative wound down to occasional conference calls, following the departure of Grindle to join Co-Impact and the rise of sector thinking on a deeply intertwined theme: systems change.

Definition of success

The T-Scale leadership defined success as influencing sector thinking and participants' practice (with a yearly scorecard on the initiative's strategic evolution). Specifically, the initiative's leaders monitored:

- 1) Funder and NPO participants' breakthroughs – the ways they pivoted from serving incrementally more clients to solving problems their clients faced at scale, through lowering cost, creating commercial demand, plugging into public systems, and other means.

2) The shifting of sector opinion to emphasize the importance of strategies that created large-scale impact via methods that went beyond simply scaling an organization's size: policy change, market shifts, unbundling, training others, and so forth.

Definition of measures

Measures evolved to include:

Survey and interview data – In-depth interviews and a survey after Impact Lab 1 gauged participants' perceived benefits and changes in behavior. A survey after Lab 2 gauged participant benefits and satisfaction.

Observations of language use and conference themes gave an indication of whether T-Scale ideas seeped into sector groundwater.

Taking Action

Fostering learning

CURATED LEARNING: Before the collaborative's first meeting, Bridgespan spent 2014 building a coalition of the engaged. It assembled online commentators on transformative scale into an SSIR In-Depth Series, [Achieving Transformative Scale](#), invited leadership teams to join the first Impact Lab and developed profiles of successful, large-scale change. Over the next two years, T-Scalers continued to learn together via the inaugural 2015 Impact Lab, opt-in conference calls and webinars, and three curated minilabs around specific topics: technical assistance, intermediaries, and platform plays. HBS-Bridgespan's second Impact Lab, in the spring of 2017, included "lightning talks" by experts on approaches to large-scale change. About 90 executive team participants came from ten U.S.-focused NPOs, 12 international NGOs and seven funders.

OPEN LEARNING: Throughout, Bridgespan kept up a drumbeat of research, publishing, and conference talks to share insights externally. These included:

- ["Transformative Scale"](#) (SSIR 2014);
- ["Designing for T-Scale: Global Lessons"](#) (Rotman 2015);
- TechSocial [blog series](#) (Fastcompany.com, 2015);
- ["Field Catalysts"](#) (SSIR 2016);
- [Network Transformation](#) (Bridgespan report 2016);
- [Billion Dollar Bets to Revive the American Dream](#) (Bridgespan report/ Atlantic article 2017);
- ["Why Indian NGOs are Experts at Scaling Up"](#) (Impact India 2017);
- ["Audacious Philanthropy"](#) (HBR September 2017);
- ["Selling Social Change"](#) (SSIR, November 2017);
- A T-Scale [occasional blog](#) on Bridgespan.org, hosted by co-lead Bradach, and sharing big ideas from the collaborative; and
- Impact Lab 2017 "Lightning talks" both podcasted on Bridgespan.org and published in the SSIR series [Achieving Transformative Scale](#).



Cross-pollinating actors

Co-leads Grindle and Bradach held calls with participants and introduced those who shared goals. For example, Chuck Harris of the Edna McConnell Clark Foundation participated in Impact Labs during the run-up of EMCF's launch of Blue Meridian Partners. Rebecca Onie (Health Leads) spun out a working group from Impact Lab participants, while Olivia Leland, founder of Co-Impact, maintained a rhythm of calls with Bradach and Grindle prior to its launch, eventually hiring Grindle into her founding team. A number of Impact Lab participants saw their plans funded by big bet philanthropy with grants over \$10 million. For example, Pratham, an education nonprofit based in India, became one of Co-Impact's first awardees; Year Up became an investee of Blue Meridian Partners and One Acre Fund received an award from The Audacious Project.

Crediting adopters

Examples illustrating gains filtered into Bridgespan publications, and the Impact Labs provided participants with a closed environment to share their stories. The collaborative established a Transformative Scale resource center at Bridgespan.org to share content and ideas, but did not release public detail on participants or specific gains.

Results

Ultimately, the Transformative Scale Initiative influenced most participants' thinking, some participants' action and flavored the social sector's groundwater with ideas related to systems change.

Specifically, after the 2015 Impact Lab, 91 percent of participants reported accelerating progress toward large-scale change; 60 percent began scoping or implementing a new approach. Participants gave high marks to the Impact Labs and mixed reviews for conference calls and minilabs. A number of participants pivoted their strategies (some of which were in development prior to Impact Labs, but gained momentum during the initiative), including:

- Year Up launched Grads for Life;
- BELL refined its licensing model with The Y;
- Akshaya Patra planned to sell its overnight kitchen capacity to fund its daytime hot lunch program;
- Blue Meridian Partners – well along its strategy prior to T-Scale – opened its doors;
- Pratham began thinking about packaging its approach in India for other countries, and in 2019 won a Co-Impact grant (between \$10 and \$50 million) for its “Teaching at the Right Level in Africa” initiative with MIT's Jameel Poverty Action Lab;
- Educate Girls began developing a strategy that led to a 2019 award from The Audacious Project;
- CIS aligned staff around the core concepts of scaling impact beyond the direct work.



Sector literature and conference presentations proliferated on the topic of large-scale change. (See SSIR “[What’s Your End Game?](#)” and dozens of articles on systems change post 2016.) A highly related Bridgespan initiative on “Big Bet philanthropy” cross-pollinated, too, and helped to tip funder and grantee ambitions. Said one 2015 Impact Lab survey respondent: “The Idea of \$100 million grants [to nonprofits], apart from universities, would have been ludicrous a few years ago.”

Bridgespan conducted a follow-up survey on the second lab, which garnered high marks for relationship building, idea prompts and supportive environment. It did not conduct a final evaluation of the initiative.

Insights

Involve doers and donors: Humans learn best when they learn together - When you spend three days (in a lab) with your team, focused on a problem, you make progress.

Tap into existing will to shift strategy, then build skill to shift effectively. Tools can aid action – In 2016, the initiative began equipping followers with frameworks to translate aspirations to daily work. (e.g. Field Catalyst framework for nonprofits, Audacious Philanthropy framework for funders.)

Who convenes matters: The HBS partnership for Impact Labs created both a neutral and appealing venue for the labs.

Collaborative learning requires choreography. Assembling the right mix of participants was key in the lab approach (including enough diversity for fresh ideas, enough critical mass around a given field or function or geography for participants to find relevance, and enough seniority to decide and act). One missing element may have been government funders.

Grounding discussion in real decisions ups the odds of converting insight to action. Structuring lab and webinar conversations around real questions from participants, and grounding learning in current work, led to real decisions and progress by leadership teams.

Watchouts:

Core Support Matters: Communities need a center to sustain – a dedicated manager, resourcing and predictable rhythms of learning all help to sustain an initiative and resist entropy.

Branding matters: If you don’t define and memorably name your movement others may - T-Scale ultimately blurred into Systems Change thinking, a moniker that has had staying power.

Keep the goal simple, and value proposition clear or it's harder to measure progress and tell your story. T-Scale measures evolved and focused on concept design, making evaluation tricky.

Putting doers and donors in the same room doesn’t put them on the same page. Conveners need to seed active, relevant, respectful dialogue.



Milestones

January – June 2013

Viewpoint in *SSIR* and speech by Jeff Bradach at Social Impact Exchange launches the idea of designing solutions for scale from the outset.

Feb – Oct 2014

Bridgespan "Transformative Scale" article in *SSIR* (as part of GEO supplement on scaling impact) launches the big idea, reinforced by a follow-on "*SSIR* X Bridgespan" series on Achieving Transformative Scale, which curates 25-plus voices over the life of the initiative.

Feb 2015

T-Scale Collaborative becomes a reality – comprising a community of learning and practice via an Impact Lab at HBS with top two or three leaders of NPO networks and funders committed to T-Scale. Discussions drew on participant goals and experience.

Mar 2015 – Feb 2017

T-Scale Collaborative holds a series of minilabs, webinars and conference calls on breakout topics.

March 2017

The second Impact Lab takes place at HBS with leaders of 29 organizations. Lightning Talks introduce outside expertise to fuel discussions; and Jeff Bradach creates a public "explainer" video.

Literature sources

Bridgespan.org – T-Scale Resource Center including all T-Scale publications

List of Impact Lab Participants

Evaluation results of 2015 Impact Lab

People sources

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2. Abe Grindle, Director of Investments and Learning, Co-Impact; former Bridgespan manager and co-lead on T-Scale initiative
3. Laura Lanzerotti, Bridgespan Partner, Designer of Impact Labs for T-Scale collaborative
4. Bala Venkatachalam, Executive Director of Pratham U.S., T-Scale collaborative participant
5. Katie Smith Milway, former head of Bridgespan knowledge practice