



Philanthropy support has the ability to extend beyond traditional funding. By leveraging relationship building, convenings and providing management or technical assistance, donors can take their giving to the next level.

Chapter 10









More Than Money: How to Expand Your Impact

As part of the global shift toward a more strategic philanthropy, donors are increasingly seeking ways to better support grantee partners by creatively leveraging their resources and capabilities, such as reputation, convening power, and beyond.

By providing non-traditional methods of support that go beyond traditional grantmaking, donors can significantly accelerate impact, resulting in more strategic and equitable support for grantees, partners and communities.



As philanthropy becomes more attuned to the needs of grantees, here are a few ways to explore going beyond monetary support:

-  Assisting in relationship building
-  Amplifying influence
-  Being transparent
-  Hosting convenings
-  Providing technical assistance and general management advice
-  Crafting application and reporting processes helpful to grantees
-  Continuing relationships with former grantees or unsuccessful applicants
-  Engaging in impact investing

Whatever additional or alternative support is given, it is critical that your grantees are involved in driving these decisions so that the support provided is based on their needs. In other words, providing alternatives to money for funded partners should be done only when your partners or grantees readily agree it makes sense from a strategic and time point of view.



Assist in Relationship Building

Establishing and maintaining relationships is the key to progress for many grantees, issue areas and communities. Many of the issues that donors seek to address involve a complex web of actors across the philanthropic, corporate, NGO, nonprofit and civic society sectors; there are many moving parts.

Engaging with, learning from and advocating alongside others doing similar work, or seeking similar outcomes, can help propel change beyond what one entity alone can achieve. Indeed, every community-wide issue – and even more so those affecting multiple communities – needs the involvement of many stakeholders. Relationships are incredibly valuable.

In some cases, grantees need support connecting with the constituents of systems, especially powerful and influential system actors such as governments, multilateral organizations, businesses and large donors. Donors can help build those relationships as part of the spectrum of support they give.

Relationships that can be particularly fruitful include those with peer organizations, other funders engaged with similar issues, community groups, NGOs, and government entities working in the same area of interest. Interactions such as this can be particularly significant for smaller, younger-stage and BIPOC-led organizations without expansive networks.³¹

Donors who embrace the Talent Agency or Field Builder [Operating Archetypes](#) may naturally gravitate to this relationship-building approach. Regardless of archetype, however, assisting grantees in this way can be helpful for most grantee/donor relationships and for increasing the impact of the work that is the subject of the partnerships.

³¹ <https://www.trustbasedphilanthropy.org/support-beyond-the-check>

You can help grantees build relationships by:

- Hosting ongoing communities of practice among grantees working in similar fields/communities
- Having an annual convening to discuss learnings and innovations in your field
- Simple email introductions to individuals you think may help or otherwise be valuable to others
- Including grantees in meetings
- Coordinating efforts with other funders and their grantees in the same field, in the planning as well as the implementation stage
- Giving grantees a platform to share their work both within your organization and beyond
- Creating or hosting an online platform, portal or database to which you provide free access to relevant parties



Amplify Influence by Building Networks

In addition to assisting in relationship building, funders that wield significant influence in the philanthropic sector can use their influence to amplify grantee partners to a broader network. This amplification can include promoting individual or organizational change agents who are closest to issues.³² Inherent in that amplification is the reflected credibility and relative power of the funder, aiding in awareness of grantee projects and messages. As a funder, leveraging your profile, network, connections, and expertise to benefit your grantees and other partners can include:

- Highlighting grantee partners' work in foundation newsletters, on websites, at webinars, and during conference presentations
- Introducing grantees to strategically aligned and interested funders
- Inviting your grantees to co-present at funder and other related conferences
- Giving awards to highlight the work the grantee is doing³³
- Boosting grantee profiles, creating social media attention, and featuring in online and other published pieces

³² <https://www.rockpa.org/wp-content/uploads/2022/05/Operating-Archetypes-2-1.pdf>, 7.

³³ For more detail regarding prize philanthropy, see Chapter 4.



Aspects of RPA's Shifting Systems Initiative capture the importance of relationship building. Launched in 2016 in partnership with Porticus and the Skoll, Ford and Draper Richards Kaplan foundations, the Shifting Systems Initiative's mission is: "To examine when, how and why certain solutions achieve system-level shifts, and to share the lessons and recommendations from those successes."³⁴ The initiative's first report, *Scaling Solutions Toward Shifting Systems*, highlighted organizations that had scaled solutions and how funders had helped or hindered the process. In the report, the initiative details findings that funders can help grantees scale toward shifting systems by using the acronym "SCALE." The letter "A" in the acronym is particularly notable to the broader issue of what beyond funding has emerged as a key strategy for how funders can better support grantee partners. Through the Shifting Systems' body of work, the letter "A" accounts for "Accelerating impact through needed non-monetary support, such as making introductions to other funders, boosting social media attention and providing technical assistance."



Host Convenings

Convenings are another way in which funders can provide significant non-monetary support to their grantees and communities with which they are engaged. The Skoll Foundation's Skoll Awards for Social Innovation is a high-profile example of this.³⁵ Each year, the Skoll Foundation hosts an international event that awards social innovators whose work targets root causes of societal problems for transformational social change. The ceremony is widely publicized and attended by many important sector stakeholders.

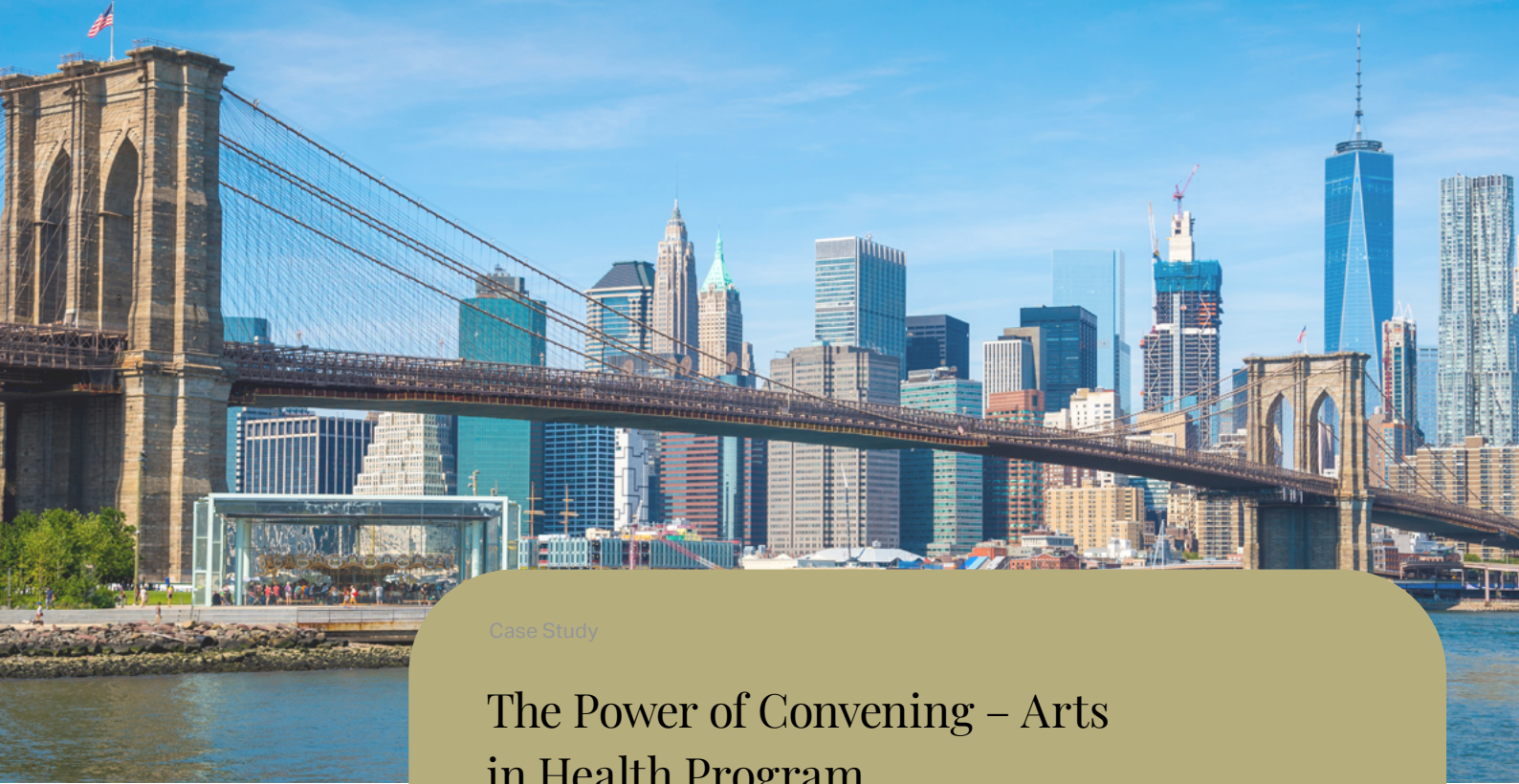
Apart from the monetary impact, the Skoll Awards are important for shining a spotlight on grantee partners, who can potentially gain recognition and support from other funders and collaborators. As Rachel Flynn, Director of Funder Alliances at Skoll, has mentioned to RPA previously, being recognized as a Skoll Awardee is a clear sign to other funders of a grantee partner organization's potential to have a major impact.³⁶ Recognizing this impact, the Skoll Foundation spends a considerable amount of time talking to other funders about the grantee partner organizations it has engaged through the awards.

Philanthropies with the Operating Archetype of Campaign Manager are particularly adept at using convenings and other approaches to bring together stakeholders to help drive more impactful solutions. However, all types of philanthropies can provide significant benefits to grantees and communities through convenings by:

- Creating communities of practice that convene to discuss particular issues
- Providing programming support for convenings by identifying topics for discussion and areas of growth and collaboration
- Providing platforms for such collaboration and venues for events
- Hosting ceremonies or awarding prizes that recognize effective initiatives and practices
- Ensuring that convenings give voice to all affected communities through invitations and financial support (e.g., airfare, hotel, etc.)
- Supporting the costs of convening for physical logistics and invitations, as well as planning and more
- Providing publicity related to convenings and awards to raise awareness
- Ensuring equity of access to convenings for lesser-resourced entities to help build their capacity
- Publishing and broadly disseminating information generated by convenings

³⁵ <https://skoll.org/about/skoll-awards/>

³⁶ <https://www.rockpa.org/wp-content/uploads/2022/05/Operating-Archetypes-2-1.pdf>, 34.



Case Study

The Power of Convening – Arts in Health Program

The Arts in Health program at the Laurie M. Tisch Illumination Fund is an example of the power of convening.³⁷ In 2018, the Illumination Fund launched the Arts in Health program – a \$10 million multiyear effort to support organizations in New York City that utilize art and creativity to raise awareness around and promote healing for mental health stigma, trauma, and aging-related diseases, particularly in marginalized communities. The Arts in Health program prioritizes raising awareness through communications. This is done by highlighting the critical work grantee partners are doing to address health issues through the arts, using news media outlets, policymakers and public agencies.

Arts in Health also uses convening to center grantee partners and communities served in an effort to fulfill the fund's commitment to equity. The program team convenes grantee partner cohorts that allow for communication feedback loops, both with the funder's program team and among the cohort participants themselves. Illumination Fund Executive Director Rick Luftglass explains that "... this process really gives [the team] the pulse of things changing in real time."

By convening grantee cohorts, the Arts in Health program also creates opportunities for the fund and grantee partners to share knowledge and cross-pollinate different areas of expertise. The program shows that by supporting grantee partners with convening power, there can be a continual flow of information, cross-learning and co-creation that focuses on the grantee partners. Convening can be a means of organizing in service of grantee partners, and donors like The Illumination Fund are building "interconnected ecosystems of organizations" working beyond traditional lines.³⁸

³⁷ <https://thelmtif.org/our-programs/arts-in-health/>

³⁸ <https://www.rockpa.org/wp-content/uploads/2022/05/Operating-Archetypes-2-1.pdf>, 60.



Be Transparent

Transparency is another non-intuitive way that donors can help their grantees and partners. The power imbalance so evident in the funder-grantee relationship is also seen in who knows what, when and how that information is then dispensed, and by who.

This is particularly true when considering strategy and grantmaking decisions. Grantees often don't understand how funders work. Receiving clear information from funders helps grantees and other partners plan and execute their activities better and also properly manage expectations.

Engaging in the following activities can help grantees and others make the change you want to see:

- Making your mission, vision, values and strategy readily accessible to as broad an audience as possible – for example, by posting on a website
- Communicating timelines for funding applications, funding decisions, fund disbursements and other important dates
- Providing easy access to information about the portfolio of grantees and sub-grantees, impact of programs and lessons learned
- Articulating overall budget and grant terms for all programs
- Sharing the explicit and implicit criteria used to decide whether to give or renew support
- Providing explanations on reasons for granting, denying or ending funding



Provide Technical and General Management Advice

Many organizations funded by philanthropy lack sufficient technical resources or formal systems, tools and experience to support the management of a project or program.

On the other hand, there are funders who have the skills and knowledge to help those entities buy assistance or can provide direct assistance in building these resources. Indeed, the Operating Archetypes of Talent Agency and Field Builder often provide this type of support as a key component of their offerings.

Key to providing this type of support, however, is avoiding the "savior" complex and being aware of the power dynamics in play when offering this kind of assistance.³⁹ When requested or suggested by grantees, however, here are some of the ways funders with the relevant resources can help:

- Providing expertise in communications, marketing, human resources, finance or technology
- Taking one (or more) board seats, when the grantees agree that the process and individual are a good fit
- Matching grantees with individuals or organizations that have the expertise they lack

³⁹ For further discussion on knowledge-sharing and dynamics between funders and grantees, see Chapter 8.

Craft Application and Reporting Processes That Are Helpful to Grantees

Some funders use standard application and reporting processes across their programs and initiatives as a way of streamlining their work. Others seek in-depth, detailed information based on the presumption that the more rigorous the application or reporting requirements, the more likely the process will identify the "best" organizations to begin or continue funding.

While some funders require a lot of information to help them make funding decisions, many applicants find the process difficult and intimidating. Often the information requested is not very helpful either. The simpler the process, the easier for both funders and grantees – provided that the information requested is useful and relevant to decision-making.

This approach is increasingly being adopted by many donors, particularly those whose issue areas focus on equity, economic growth or social justice. Project Streamline, an initiative from PEAK Grantmaking, expresses this goal concisely in describing itself as an effort aimed at "reducing the burden on nonprofits" and freeing up "more time and money for mission-based activities."⁴⁰

Many examples of organizations that have engaged in more helpful application practices are available. One example is the Knight Foundation, which runs an art challenge that is designed to attract innovative art projects from a very diverse pool of applicants.⁴¹ The Program Officer, Adam Ganuza, made himself available for in-person meetings with anyone who was interested in submitting an application to the Knight Arts Challenge. This was a signal to potential entrants that anyone was welcome to participate and also a way of providing helpful feedback on the process.

Lever for Change helps potential grantees by putting finalists on a website and promoting them, with the objective of inspiring additional funding.⁴²

The Chicago Prize from the Pritzker Traubert Foundation tiered its application process, and then provided \$100 000 in planning grants for the top six finalists to cover the costs of the extra work needed for the next phase of the application and information process.⁴³

These are all different approaches that had the intent and effect of helping grantees.

⁴⁰ <https://www.peakgrantmaking.org/principles-for-peak-grantmaking/project-streamline>

⁴¹ <https://www.knightfoundation.org/challenges/2021-knight-arts-challenge/>

⁴² <https://www.leverforchange.org>

⁴³ <https://www.ptfound.org/chicago-prize/overview>

A few practices you can employ as a funder with respect to the application and reporting processes include:⁴⁴

- Providing general operating support – the most challenging aspect of fundraising – that also minimizes the specificity of reporting needed and allows grantees to focus on driving, instead of reporting, impact
- "Right-sizing" requirements and levels of support relative to the size of the grant, the size/expertise/resources of potential grantees, and experience with the grantee.
- Including communities, potential grantees and constituents in a meaningful way in the process of developing applications and reports
- Discussing the report or evaluation with the grantee instead of just reviewing it online or on paper. Grantees typically find such engagement extremely helpful
- Streamlining vertically, for example by combining reporting with renewal

⁴⁴ These recommendations align with the Trust-Based Philanthropy Project. For more information, see <https://www.trustbasedphilanthropy.org/>.

- Allowing applicants to include links to existing materials and resources – for example, on key pages of their website, Form 990 (in the US) or annual report – instead of reworking existing material to fit your form
- Accepting reports submitted to other funders instead of creating bespoke requirements
- Being clear on what is expected, providing examples, and noting word limits or page counts to help grantees understand the level of detail and framing being requested
- Providing comments on both approved and rejected applications to guide grantees for future applications
- Creating cohorts or working groups for applicants to review other applications in similar issue areas
- Aiding in the crafting of applications
- Experimenting with oral, video or audio reporting
- Tiering the application process to help grantees crystallize their ideas and theories of change early on, and providing planning grants for those who advance to higher stages to cover the costs of time and resources needed for the more intensive process



Continue Relationships With Former Grantees or Unsuccessful Applicants

Once a funding or potential funding relationship ends – either through completion of joint work or where an application was unsuccessful – there is still room for engagement that can be helpful to grant-seeking organizations.

For those organizations that are engaged in addressing the same or complementary challenges, it is helpful to continue the relationship either by sharing useful information or using them as experts for a new cohort of grantees, for example.

This ongoing relationship, while not based on a funding request, can be important. Our experience shows that the more awareness, engagement and partnership of players in an area (in general), the more innovation and impact will be driven in that area. This does not imply that philanthropies should extend significant resources to all relationships – you need to consider both the status of the relationship and the benefit to the sector or individual organizations.

However, there are at least a few low-resource ways to engage with this pool that philanthropies might want to consider:

- Creating mailing lists for disseminating updates about developments in particular issue areas
- Engaging former grantees as mentors, advisors or evaluators for new applicants
- Interviewing applicants for feedback on the process – and making sure to incorporate that feedback
- Inviting applicants or former grantees to attend convenings or engage in webinars
- Inviting former grantees or applicants to nominate other potential grantees, especially in the context of prize philanthropy, to broaden the applicant pool to a more diverse population
- Leveraging former grantees to create cohorts or collaborative efforts by putting new grantees in touch with them



Provide Support Through Impact Investing

The approaches noted in this chapter revolve around ways to support and partner with grantees that do not involve the direct transfer of money. This chapter, however, would not be complete without touching on the concept of impact investing as a way to support grantees beyond the typical grantmaking approach.

As more and more funders search for ways to leverage their full spectrum of assets to support their respective missions, visions, values and theories of change, impact investing by philanthropies has been on the rise. This is a result, in part, of the growing realization among those who seek to influence society for good that they can use a broader range of their assets to complement, and even accelerate, their social impact goals.

Philanthropy, the voluntary use of private resources for public benefit, is not limited to purely donated funds. Impact investing is an investment approach that seeks to create social benefits in addition to financial gains, such as investing in renewable energy or sustainable agriculture. It is very relevant to philanthropists as it is an approach that can be highly beneficial to grantees.

Indeed, comparing resources typically dedicated to philanthropic donations (for example, typically 5% of an organization's endowment in the US) with the 95% of financial assets typically invested for growth, it becomes clear that impact investing is in fact required to solve the deeply persistent challenges and inequities in our society.⁴⁵

Impact investing is therefore becoming a popular avenue for philanthropists beyond traditional grantmaking, and also as a way of aligning a larger portion of financial assets with philanthropic goals. Philanthropic impact investment differs from regular, financial-return-first investments in that it tends to take a more patient approach, with lower expectations and longer timelines. And even if there is an expectation of returns – potentially lower and slower returns are accepted – it is distinct from philanthropic giving in that it is mostly leveraged for projects that have potential to generate income over time.

⁴⁵ For more detail regarding impact investing, see Chapter 4.

Grants Are Only One Path to Impact

As this chapter has shown, grants are one way that philanthropists can help their grantees and serve communities to change for the better.

It is crucial to understand, though, that non-monetary support must be driven by the needs and requirements of the grantee – it is important to get the grantee's perspectives.

The philanthropic sector is embracing a sense of trust and transparency when it comes to carving out space for more equitable decision-making. This means implementing two-way communications and putting grantee partners at the center of shared work.

This trust provides broader and deeper opportunities for partnership, which in turn can translate into better outcomes. Working in authentic and trusting partnerships, looking to communities for wisdom, and using the above-noted behaviors to support grantee partners beyond monetary funds can create truly transformative change.

Segal Family Foundation – Supporting Social Change in Sub-Saharan Africa

2019 Annual Meeting



Segal Family Foundation (SFF) is a social impact funder and advisor transforming how change happens in Africa.⁴⁶

Overview of the Foundation and Approach

The foundation was started in 2007 by Barry Segal and his wife Dolly with the aim of funding grassroots organizations that were working to bring about social change in Africa. Today, SFF has over 380 grantee partners across 17 African countries and has provided over \$100 million in funding to support local actors who are driving change in their communities. In 2022, Segal Family Foundation was named the second largest U.S. grantmaker in Africa by number of grants.

According to executive director Andy Bryant, one of the keys to the foundation's success has been its focus on directly funding African-led organizations, rather than giving to large NGOs where the dollars might not trickle down. Bryant says, "I think we've happened upon something really strong—placing local actors at the helm of development agendas in their countries. Local leaders, with their intimate understanding of local problems and solutions, are central to everything we do."

SFF's approach of supporting local actors and organizations has been a core tenet for years. To build trust throughout SFF's board and with key stakeholders, Bryant says, "We started off small and treated it like a pilot or experiment. For example, we identified a problem in Burundi where we wanted to build out a portfolio of grantees. We wanted to focus on local leaders. It started with five organizations, and then became 10. Over time, it became hundreds across multiple countries." Starting small and scaling up gradually allowed SFF to build strong partnerships with local organizations along the way.

⁴⁶ <https://www.segalfamilyfoundation.org>

Moving Beyond Traditional Support

However, Bryant recognizes that there are still logistical barriers that need to be addressed. “Our work now is trying to figure out how to remove logistical barriers to the decisionmaking so that other funders can move from rhetorical agreement to action,” says Bryant. These barriers can seem mundane — e.g.- granting to non 501(c)(3) organizations or dealing with organizations that don’t have a strong command of English — but getting past them unlocks a whole new set of changemakers that might otherwise be overlooked.

One way that SFF is supporting its grantee partners is by giving them a platform to share their work and experiences. “If I’m going to a conference, my first question is, ‘Who can I bring along? Do you have a speaking role or a prominent spotlight you can shine on this partner’s work?’” Bryant says. “Too often funders do a lot of talking about the doers, especially those from the Global South, when it would be more meaningful to give them the opportunity to talk about their own work themselves. Our grantee partners are experts in their own right and they are best positioned to talk about their work and the impact that they are having in their communities.”

In addition to its grantmaking support, SFF is also working to change the ecosystem surrounding its work. SFF sources nearly everything— strategic planning experts, financial management consultants, photographers, videographers, musicians—from East Africa rather than from traditional Western sources like San Francisco, Washington, DC, or Brussels. This approach allows SFF to begin to localize the entire development ecosystem- not just one piece.

By empowering grassroots organizations in Sub-Saharan Africa, SFF is supporting the development of sustainable solutions that are grounded in local knowledge and expertise. SFF’s commitment to removing barriers and amplifying the voices of those doing the work is helping to build a more equitable and inclusive development sector.

“In addition to the transmission of our portfolio grantee partners toward more local representation, and the transformation of decision-making for grants within our work, we’ve also changed the ecosystem surrounding our work.”

Andy Bryant,
Executive Director of SFF

Additional Resources

Building Equitable Evidence: It's Time to Look to Participants as Experts in Their Own Experience: <https://cep.org/building-equitable-evidence/>

Center for Effective Philanthropy, *Grantees Report Back: Helpful Reporting and Evaluation Processes*, <http://cep.org/wp-content/uploads/2016/08/HelpfulReportingEvaluation.pdf>

Equitable Evaluation Initiative, <https://www.equitableeval.org/framework>

Fund for Shared Insight, <https://fundforsharedinsight.org/>

Project Streamline, *Drowning in Paperwork, Distracted from Purpose*, <https://www.peakgrantmaking.org/resource/drowning-in-paperwork-distracted-from-purpose/>

Putting Grantees at the Center of Philanthropy, <https://www.geofunders.org/about-us/perspectives/putting-grantees-at-the-center-of-philanthropy-6>

Rockefeller Philanthropy Advisors, *Impact Investing Handbook*, <https://www.rockpa.org/wp-content/uploads/2020/10/RPA-Impact-Investing-Handbook-1.pdf>

Rockefeller Philanthropy Advisors, *Operating Archetypes*, <https://www.rockpa.org/wp-content/uploads/2022/05/Operating-Archetypes-2-1.pdf>

Rockefeller Philanthropy Advisors, *The Philanthropy Framework*, <https://www.rockpa.org/wp-content/uploads/2019/02/The-Philanthropy-Framework-1.pdf>

Rockefeller Philanthropy Advisors, *Philanthropy Topic Briefs*, <https://www.rockpa.org/knowledgecenter/philanthropy-topic-briefs/>

Rockefeller Philanthropy Advisors, *Prize Philanthropy: Benefits, Challenges, and Winning Approaches*, <https://www.rockpa.org/guide/prizephilanthropy/>

Rockefeller Philanthropy Advisors, *Scaling Solutions Toward Shifting Systems*, <https://www.rockpa.org/wp-content/uploads/2018/10/10-20-RockPA-Scaling-Solutions-02-WEB-1.pdf>

Rockefeller Philanthropy Advisors, *Understanding Your Philanthropy Framework Assessment Tool*, https://survey.co1.qualtrics.com/jfe/form/SV_9peDnTZzq975CVn

Trust-Based Philanthropy Project, <https://www.trustbasedphilanthropy.org/>



Conclusion

Philanthropy driven by purpose and values has the potential to be transformative. As the immense challenges that face our world continue to shift and escalate, it is extremely important to intentionally define those values and have a plan to act on them. This book aims to drive conversations about, and consideration of, what exactly those values are for new and existing philanthropies alike. We hope to eventually drive thoughtful implementation of approaches that create the change you wish to see.

As philanthropy's benefit to society comes increasingly into question and public trust continues to erode, it is time to challenge the sector to do better by interrogating these values and authentically collaborating to accelerate progress toward a more just world. Rooted in 20 years of practice, RPA has been able to produce robust bodies of work, including toolboxes and a selection of options encapsulated in this book that encourage donors to research and reflect on their philanthropy.

As you forge your path and develop your next steps, we encourage you to share your thoughts on the ideas in this book with friends and family. We also encourage you to conduct thorough research that brings in personal connections, trusted advisors, and especially the voices and wisdom of the communities you wish to serve.

We hope you will find the book useful, and that by taking a look at norms, strengths and unique ways of thinking you can amplify your giving and unleash the true potential of your philanthropy.

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About Rockefeller Philanthropy Advisors

Rockefeller Philanthropy Advisors (RPA) accelerates philanthropy in pursuit of a just world. Continuing the Rockefeller family's legacy of thoughtful, effective philanthropy, RPA is a global nonprofit at the forefront of philanthropic growth and innovation, with a diverse team of experienced grantmakers with significant depth of knowledge across the spectrum of issue areas. Founded in 2002, RPA has grown into one of the world's largest philanthropic service organizations and has facilitated more than \$4 billion in grantmaking to more than 70 countries. RPA currently advises on and manages more than \$600 million in annual giving by individuals, families, foundations, and corporations. RPA also serves as a fiscal sponsor for over 100 projects, providing governance, management, and operational infrastructure to support their charitable purposes.

