

Chapter 7

Partnering for Significant Change

Partnering with other stakeholders is essential to achieving effective and impactful change in today's philanthropic landscape. Partnerships help donors amplify their impact by leveraging the expertise and resources of other stakeholders. They also offer exposure to innovative ideas and practices. Collaborations with stakeholders play a pivotal role in addressing complex social and environmental challenges, particularly when working toward ambitious global objectives such as the UN Sustainable Development Goals (SDGs). This chapter equips philanthropists with helpful insights for navigating partnerships with grantees, communities, governments, NGOs, and other donors.



By leveraging complementary strengths, aligning strategies, and building trust and transparency, philanthropic partners can achieve greater impact and scale in their work and develop sustainable solutions to complex social problems.



Partnering with Grantees and Communities

Effective philanthropy thrives on collaborative efforts with the grantees and communities you seek to impact. Some of the many forms this partnership can take include co-design of programs, participatory decision-making, capacity building, community consultation, data sharing, and co-funding. Success in these partnerships hinges on true engagement, a genuine willingness to learn (i.e. having a beginner's mind), and the provision of essential support and resources. Trust, mutual respect, transparency, and prioritizing listening and learning are pivotal to their success.

Prioritize listening and learning.

Donors' listening and learning form the cornerstone of successful partnerships. This involves more than just passive observation; it's an active, ongoing process that requires donors to:

- Dive deep into understanding the needs and perspectives of grantees and communities. To go beyond surface-level comprehension, immerse yourself in their world, acknowledging their unique experiences, and understanding the challenges they face. Take the time to learn about the context in which they operate and the history that shapes their community. This will require regular, meaningful conversations with grantees and community members. These dialogues should be open, honest, and devoid of power dynamics. Create a space where they feel comfortable sharing their insights, feedback, and concerns.
- Go beyond the boardroom and conduct site visits to see firsthand the environments in which your partners work. Immerse yourself in their daily reality. This not only demonstrates your commitment but also allows you to witness the impact of your philanthropic efforts and identify potential areas for improvement. Be acutely aware of practices that could be seen as extractive, where you take more from the community than you give back. Ensure that your interactions do not burden your partners, but instead provide mutual benefits and opportunities for growth.
- Implement feedback mechanisms that are accessible and responsive. Surveys, focus groups, and regular check-ins can provide a structured way to collect input from grantees and communities. These mechanisms should be designed to minimize burdens on those grantees, and to ensure feedback is constructive. Importantly, demonstrate a willingness to adapt your strategies based on the insights you gain. This adaptability shows that you value the expertise of your partners.

Prioritizing listening and learning requires a genuine commitment to being an active and empathetic partner. It not only fosters trust and mutual respect but also allows you to co-create more impactful solutions by leveraging the wisdom and experience of your grantees and communities.

Ensure that grantees and communities have a seat at the table.

Trust-based philanthropy and concepts of diversity, equity and inclusion are integral to successful partnerships with grantees and communities served. It's not about granting a token presence but fostering a dynamic, inclusive collaboration.

Donors successful in true partnership engage in trust-based philanthropy, which acknowledges that trust is fundamental to productive relationships. It entails a shift from top-down approaches to ones built on mutual

trust. Trust-based philanthropy encourages multi-year, flexible funding, which empowers grantees to adapt strategies as needed. Transparency and open dialogue are key components.

Relationships are also deepened when donors recognize and seek out community partners that have diverse backgrounds, experiences, and perspectives. Diversity enriches the conversation and leads to more comprehensive, effective solutions; and donors should ensure that partners represent the full spectrum of voices, especially those who may have been historically marginalized or underrepresented.

Beyond simply having representation at the table, philanthropists can prioritize inclusion by providing opportunities for active engagement. This will require making sure their input is not just considered but integrated into strategies, and creating an environment where they feel comfortable sharing their insights without fear of repercussions. Collaboratively designing initiatives with grantees and communities can ensure that your philanthropic efforts are aligned with their actual (instead of assumed) needs and priorities. Moreover, co-design fosters ownership and a sense of shared responsibility, which enhances the relationship.

Transparent decision-making processes create trust critical to partnership. This means removing unnecessary barriers, simplifying jargon, and ensuring that communication is clear and understandable. Decisions should be made collectively and communicated effectively to maintain transparency.

Prioritizing diversity, equity, inclusion, and trust-based philanthropy in the process of ensuring that grantees and communities have a seat at the table not only strengthens partnerships; it also empowers all stakeholders to work together toward more meaningful and sustainable change.

Understand that partnership includes support beyond annual donations.

Support and resources—the lifeblood of effective partnerships with grantees and communities—can include a variety of resources, customized to each grantee or community. It is important to be transparent about funding timelines and expectations, and partner to create reporting requirements that are informative—but not onerous on the grantee. Consider providing multi-year, general operating grants to create stability and reduce administrative burdens on grantees and as a sign of tight partnership.

Partnership also includes supporting grantee growth and development. For those that may need technical expertise to execute their projects successfully, offer access to skilled professionals who can provide guidance, training, or mentorship. Consider investing in capacity-building initiatives, which can encompass training programs, leadership development, or infrastructure improvements.

Providing customized support and resources to address the unique needs and challenges of your grantees and communities creates a deep partnership.



Partnering with Governments and NGOs

Partnerships with government agencies and non-governmental organizations (NGOs) offer philanthropic donors a wealth of benefits.

Collaborating with government agencies offers donors the opportunity to create a significant and far-reaching impact. Governments have extensive resources and reach, enabling philanthropists to address complex societal issues on a grand scale. Moreover, government partnerships provide a platform for influencing policies and advocating for systemic change. By working hand-in-hand with government entities, donors can shape regulations and legislation to address critical social issues, contributing to lasting transformations. The leverage of public funds through government partnerships significantly augments the resources available for philanthropic initiatives, amplifying their potential for success. Sustainability is another key benefit, as government programs and services are often designed for long-term impact, ensuring that donor efforts have a lasting effect. These partnerships can also enhance donors' credibility and trust among the public and stakeholders, as collaborating with government agencies underscores their dedication and seriousness in addressing social challenges. When working to change systems, government engagement is often critical.

Partnering with NGOs can also be very advantageous to donors. They often possess specialized knowledge and expertise in specific areas, enabling philanthropic donors to tap into this wealth of wisdom. Known for their flexibility and agility, NGOs can further initiatives of donors who want to experiment with innovative solutions. Many NGOs are at the forefront of innovation in social and environmental initiatives, allowing donors not only to support but also learn from cutting-edge approaches that redefine philanthropy. These organizations can be deeply rooted in local communities and serve as the bridge to understanding and connecting with the communities they serve. Certain NGOs are committed to transparency, donors can expect diligent stewardship of resources and commitment to achieving measurable impact.

Concerns about Partnering with Governments

Despite the potential for expanded reach and sustainability, some philanthropists shy away from partnering with government entities. One reason is the potential for cumbersome bureaucracy and a required adherence to complex regulations. Government agencies are frequently characterized by intricate and time-consuming processes, which can create a significant administrative burden for philanthropists. Navigating through layers of regulations and red tape can impede the efficiency of projects and delay desired outcomes. Other donors may fear legal challenges and associated risks, particularly if their structure limits certain types of donations, such as donations to political campaigns.

Another concern revolves around autonomy and control. Philanthropic donors often cherish the ability to have direct control over their initiatives, and government partnerships may necessitate ceding some decision-making authority. Furthermore, political instability in certain regions can give rise to apprehensions regarding the sustainability and continuity of partnerships. Frequent government turnover and political uncertainties can introduce unpredictability into collaborations, making long-term planning and commitment more challenging.

Additionally, some donors may harbor concerns about how they will be perceived for being allies with the "wrong" side. Philanthropists may worry that their partnership could be perceived as supporting institutions that are viewed with skepticism or mistrust by the public. There may be concerns that the public will perceive

the philanthropist as having undue influence over government decisions or policies as a result of their partnership, which can raise questions about the motivations behind the collaboration.

This perception may impact their ability to partner with other stakeholders or their credibility on a particular issue. These concerns often revolve around potential public perception and the perceived motivations behind the partnership.

By strategically selecting compatible agencies, negotiating for autonomy, bringing in those experienced working with governments, and customizing initiatives, donors can reap the benefits of government partnerships while minimizing the areas of concern.



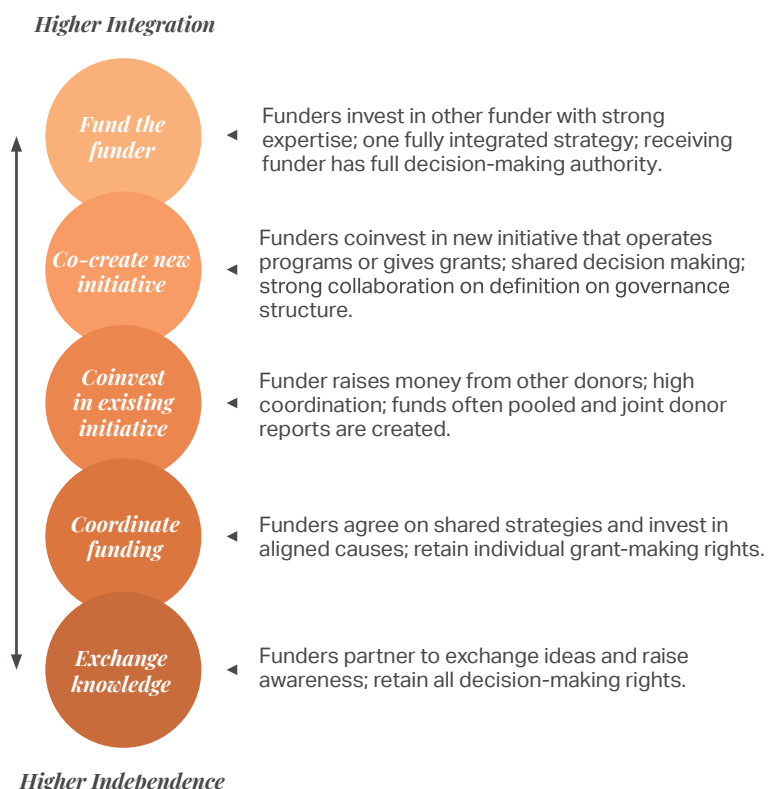
Partnering With Other Donors

Partnering with other donors—often referred to as “donor collaboratives”—involves combining resources, willpower, networks, and expertise, participants in a philanthropic collaborative can magnify their capacity to address large-scale social, economic, and environmental challenges that may otherwise be beyond the scope of an individual initiative. Collaborative philanthropy fosters the sharing of diverse perspectives, experiences, and expertise, which often leads to innovative solutions and more informed decision-making. Additionally, it helps reduce duplication of efforts, optimizes resource allocation, and increases overall efficiency in addressing critical needs.

Funder collaboratives are not limited to a particular type or level of the funder. Individuals, families, foundations, corporations, and many others participate in this philanthropic model. Funder collaboratives sometimes also work with governmental entities, NGOs, think tanks, individual experts, and other organizations in the ecosystem to further their insight, reach, and impact.

Many collaboratives are hosted by an intermediary (such as Rockefeller Philanthropy Advisors), which can provide the expertise needed to start and sustain a successful collaborative, including establishing robust governance, managing

grants, contributing issue-area expertise, and providing structure, oversight, and a neutral home. Regardless of the exact constellation of participants, collaboratives can exist in a variety of formats, from simply exchanging ideas all the way up to full integration of strategy.



IKEA: A Model of Collaboration

The IKEA Foundation is a key example of a foundation that strives to work in highly integrated collaborations.²⁴ The Swedish word *tillsammans*, which means "together" and "togetherness," is a core value of the company and a central tenet of the foundation's mission and work.

According to Elizabeth McKeon, Head of Portfolio: Climate Action, at the IKEA Foundation and a veteran of multiple philanthropic institutions, collaboration and togetherness are a part of everything the foundation does, and are particularly important for its work on climate change. "We're trying to drive collaboration more and more, because it creates more efficiency and helps us get to the goal faster while learning along the way. You can choose to privatize the benefit of grantmaking in a particular space, but we can do a lot better together."

Even with all the benefits, effective collaboration has several requirements that include, according to McKeon, a lot of energy and time, excellent governance, and the ability to let go of ego and rely on the strength of the collective team. While challenging to get right, at the end of the day the driving credo is, "If you're not collaborating, you're missing out."

Within that spectrum of integration, many different structures for collaborative giving emerge. Just as every foundation has its own structure, rules and personality, every funder collaborative has its own identity.

²⁴ <https://ikeafoundation.org/>

Questions and Characteristics for Successful Donor Collaboratives

When collaborating with other donors, it is important to align on questions of impact, approach, timeline focus area, as well as the necessity and benefit of collaboration itself. Those questions include:

- Why are we giving, and what impact do we want to create?
- How will we achieve the desired impact?
- What will we each invest in funds, time, and effort?
- What is our timeline for engagement and results?
- Why are we the right team to work together on this initiative?

Once they have gone through the above questions, donor collaborations that are successful tend to have certain characteristics in common:

The partners establish clear governance procedures early on.

Collaboration requires compromise. You can work together to structure decision-making processes and governance, but at some point, it is likely that each person in the partnership is going to have to cede control. Because many philanthropists have spent the majority of their careers cultivating certain qualities such as visionary thinking, assertiveness, and leadership, it can be difficult to step aside when necessary and cede control to others. In order to anticipate these moments, it's crucial for each collaborative to clarify their decision-making processes at the outset.

It's also important to consider the decision-making led by potential counterparts, such as executive leadership selected for execution of the shared initiative. Agreeing on priorities in these individual hires is a key point of convergence, as is identifying the processes that will guide their work alongside yours.

There is a definition of, and agreement on, shared values.

As you explore funding possibilities together, what's your North Star? What are your non-negotiables? What will help guide you when decisions are difficult, or opportunities seem unclear? Making the time to talk through these questions—and codify them—will make your partnership much easier when the way forward isn't clear.

They are aligned on how and when they will measure impact.

Once you know the impact you're seeking to create, define the tangible milestones that will define success for you. What targets will you set along the way? When do you intend to reach them? Engaging in retrospective evaluation is crucial to maintain effectiveness in an evolving group of philanthropists. As the members themselves evolve in their philanthropic vision, and the composition of the group shifts over time, the function of the collective may recalibrate in natural ways as well.

There are guidelines for how, when, and why new partners will be brought into the collaboration.

As you plan the structure and operation of your collaboration, how will you bring in new players? Finding other funders with similar goals may be easier than finding those who are also a good fit for the governance and impact measurements you've agreed to. Having a plan in place prior to the issue arising will minimize the chance for disruption of the partnership.

The strategic time horizon for the initiative is determined based on the goals of the initiative and individual participants.

In addition to talking through the expected timeframes for each partner's participation, it's also important to decide how long the collaboration will last. Is your goal to provide measurable improvements in a specific impact area over the next five years, for example? Do you want to spend three years on a particular proof of concept for a new approach to grantmaking? Do you have a plan for 20 years of funding? Considering your goals alongside the capacity of the partners involved, you can identify the right timeline for your efforts at the outset, with set times for reassessment as needed.

Transparency, publicity, and credit are pre-determined.

Is it important that each member gets an agreed-upon level or type of credit for the success of the group, even though members may provide various resources at different levels? Does anyone want or need to remain anonymous? Is there a natural spokesperson among the collaborators? Deciding how you'll speak for yourselves, and how you'll gracefully accept whatever success you might achieve, is important.

Partnerships are essential for effective and impactful philanthropy today, particularly initiatives that involve changing long-standing, systemic problems in society. Many successful partnerships include a range of types of organizations, allowing philanthropy to draw upon the strengths of various organizations with unique perspectives and types of expertise. Donors can achieve greater impact, deepen learnings, and more fully develop philanthropic practices through partnerships with grantees, communities, governments, NGOs, associations, and other donors. To increase the likelihood of achieving the goals of the collaboration, proactively prioritizing alignment, communication, relationship building, and approach are key.

Maverick Collective by Population Services International - An Experiential Approach to Philanthropy



Maverick Collective by PSI has grown into an innovative collaborative of 40+ women that has mobilized \$100 million in resources, impacting more than 6.7 million women and girls, since its founding by Population Services International (PSI) in 2013.²⁵

Combining the vision and leadership of PSI, in partnership with Melinda French Gates and Her Royal Highness the Crown Princess of Norway Mette-Marit, Maverick Collective is a community of women philanthropists making catalytic investments in health and reproductive rights to accelerate gender equality.

A Hands-On Approach

Maverick Collective embodies its values of boldness, curiosity, community and impact through its unique experiential philanthropy approach. Through hands-on experiences with the programs they fund, philanthropic partners become more authentic, activated, and accountable agents of change.

Three unique programs – Maverick Venture, Maverick Next and the new Maverick Portfolio – guide members toward deep engagement with the projects they fund through regular calls, emails and project visits. These projects are chosen through a vetted pipeline of project options that are identified as strategic and potentially catalytic initiatives. Maverick Portfolio is developed in partnership with Fòs Feminista, a feminist alliance with 170+ network members.²⁶

²⁵ <https://www.maverickcollective.org>

²⁶ <https://www.fosfeminista.org>

Through the experiential philanthropy model, funders and project teams build strong relationships. While members still receive reports, join virtual team meetings and attend conferences, the most unique experiences come from engaging in work alongside local leaders and communities. Essentially, the relationships built among members and between funders and grantees are strong.

Maverick Collective's Natalie Fellows explains that these forms of deeper participation "foster deep relationships that go beyond a typical funder-grantee dynamic," which results in a trusting environment. One example of this is when Maverick Next members visited PSI's Smart Start program in Ethiopia and had a frank discussion about how donor behavior can either help or hinder the potential for real impact. Shifting Systems Initiative's publication [Seeing, Facilitating, and Assessing Systems Change](#) states "collaboration works most smoothly when it is anchored in trust, and collaboration built on sturdy relationships among members enjoys stronger growth."

The Power of Community

Another example of the success of this collaborative approach is the success in Uganda of Maama Kits, a WHO-recommended kit intended to reduce postpartum hemorrhaging, the cause of one in three maternal deaths in Uganda.²⁸ With an investment from Maverick Collective Founding Member Sara Ojeh, PSI Uganda successfully advocated for the Ministry of Health to add lifesaving misoprostol and chlorhexidine to the kit guidelines and to make the kit accessible at community level. The pilot project has significantly increased hygienic birthing practices and seen a decline in postpartum hemorrhaging, and will be adopted throughout Uganda.

"The power of the community means their funding can be leveraged for greater impact."

Natalie Fellows

"The power of the community means their funding can be leveraged for greater impact," says Fellows. By working together as a group, these women can create impact that has rarely been available to an individual philanthropist and work toward systems change instead of shorter-term projects. Additionally, the work the community does in service of its projects and as an innovative practice in the sector underscores Maverick Collective's commitment to "achieving triple impact: impact on women and girls; impact on the members; impact on philanthropy at large."

Through experiential philanthropy, Maverick Collective and its parent organization, PSI, show how innovative and collaborative models of funding can create sustainable, transformative change. Funders come to Maverick Collective with "flexible funding, and a willingness to be bold, curious and humble," Fellows concludes. "This makes their capital invaluable, as PSI is able to pilot new solutions and test innovations that are in a traditional donor's blind spots."

By fostering relationships, emphasizing learning and trust, and truly centering the communities it serves, Maverick Collective continues to illuminate those blind spots in both complex systemic issues throughout the world and in the philanthropic sector as a whole.