



# PARTNERING WITH COMMUNITY FOR BETTER PHILANTHROPY EXECUTIVE SUMMARY

Seema Shah, PhD



# EXECUTIVE SUMMARY

**As issues of equity and inclusion come to the fore in philanthropy, the sector is beginning to grapple with what it means for those directly impacted by racism, poverty, and other social and economic inequities to also have a seat at the decision-making table.**

How are individuals directly impacted by inequity involved in shaping critical foundation activities such as strategy and program development, grantmaking decisions, communications, and research and evaluation?

This report examines the unique context of national and large foundations, including the ways in which their size, scale, and orientation pose challenges and create opportunities for meaningful partnership with communities in foundation decision-making. This paper also explores the institutional and individual competencies needed to do this work well and offers recommendations for getting started.

The findings and recommendations are based on a review of the literature, internal documents shared by foundations, and 31 interviews. Interviews were conducted with philanthropic thought leaders, staff from national and larger foundations, staff from smaller, exemplar foundations, as well as individuals who represent directly impacted communities and have served in an advisory role to foundations.

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## Why Engage Directly Impacted Groups in Foundation Decision-Making?

Foundations have myriad reasons for engaging directly impacted groups in their decision-making. Foremost among them is a desire for greater relevance and effectiveness. In addition, working in partnership with directly impacted communities enables foundations to live out values related to equity and inclusion.

Feedback from community advisors can help foundations: 1) center their work in the realities faced by the people foundations seek to serve and heighten the level of accountability the foundation has to those communities; 2) shape funding priorities; 3) inform design and process to ensure relevance; 4) ensure that communications and language resonate; and 5) influence foundations' own internal processes.

The benefits of engaging those with lived experience in foundation decision-making, particularly higher-touch forms of engagement, is about process as much as it is about programmatic outcomes. Community leaders who advised foundations said their involvement helped them: 1) gain a deeper understanding of philanthropy; 2) develop leadership skills; and 3) strengthen nonprofit capacity and social capital in their communities.

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## A Closer Look at National and Large Foundations

The paper explores how the following dimensions of national and large foundations create both barriers and opportunities for engaging people who are most impacted by inequity:

- National and large foundations have big staffs and tend to have complex internal decision-making structures.
- National and large foundations have the power, voice, and leverage to partner with government and other established institutions, such as universities, to shift policy and systems.
- National and large foundations tend to place a strong value on data-informed decision-making and evidence.
- National and large foundations are likely to face high levels of scrutiny from media, government, and/or the public, resulting in tight legal and financial controls.

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## Engaging with Community: Best Practices

Engaging directly impacted groups in foundation decision-making in meaningful, systematic, and sustainable ways begins with an organizational culture that supports such practice. Organizational culture goes hand in hand with the skills and competencies staff bring to community engagement efforts. Key considerations related to organizational culture and staff competencies are highlighted below.

### ORGANIZATIONAL CULTURE

- Executive will and leadership are needed to make engaging directly impacted groups a sustainable priority within the organization.
- Foundations doing the deepest work in this area have a strong commitment to equity and inclusion. This includes a commitment to understanding social context, historical oppression, and implicit bias.
- Foundations must grapple with notions of power—what it means to have it, wield it, and share it. Re-framing notions of power and risk can advance efforts to engage directly impacted populations.
- A strong learning culture, with license for experimentation, can help create space for incorporating more inclusive practices.

### STAFF COMPETENCIES

- Hire staff who have lived experience, a deep understanding of the historical and social context associated with the populations the foundation seeks to serve, and/or self-awareness about their own privilege.
- Be relationship-oriented and comfortable with the messiness of group process.
- Manage, analyze, and use data from both researchers and communities and translate that data into strategic inputs and directions.

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## Getting Started

Smaller shifts that happen at a programmatic or departmental level coupled with broader structural changes at the organizational level can, over time, help national and larger foundations embed community input more naturally into the DNA of their foundation. Indeed, foundations doing this work well all describe it as an ongoing learning journey, while also saying they can't imagine operating any other way. Principles to keep in mind include:

**First, do no harm. Assess capacity for community engagement efforts and be transparent about goals, process, outcomes, and boundaries/limits.** Foundations should begin with an honest assessment of their capacity to engage community and the skills their staff bring to the effort. Without dedicated time and capacity for this effort, the risk of causing harm to communities increases tremendously.

**Experiment with multiple strategies and capture lessons, successes, and failures.** The reality is that there is no standard practice for engaging directly impacted groups in foundation decision-making. Foundations should determine what works best given existing capacity, resources, and needs. Documenting successes and challenges can help inform future efforts.

**It's OK to keep it simple. Then build the muscle to deepen the work.** For foundations that are new to this work, start with a pilot effort, assess it, and then think about what it would mean to scale the work.

## ACKNOWLEDGMENTS

Support for this research was provided by the Robert Wood Johnson Foundation. The views expressed here do not necessarily reflect the views of the Foundation.

The author thanks Ashley Crawford Starck, Katrina Badger, and Michael White of the Robert Wood Johnson Foundation for their thoughtful stewardship and guidance of this project.

Nadia Brigham, Aaron Dorfman, and Valerie Threlfall served as advisors to the project and their deep experience and wisdom shaped the report in valuable ways.

Abbey Cofsky, Natalie A. Collier, and Lisa McGill, Ph.D. also reviewed drafts of the report and their insights contributed significantly to the final product. Special thanks to Laura Speer of the Annie E. Casey Foundation and Hanh Cao Yu of The California Endowment, who reviewed the case studies for their respective institutions and provided helpful clarifications and comments.

Finally, the author thanks all who were interviewed for this report and graciously shared their time and perspectives on how foundations can better engage community constituents in their decision-making.

## ABOUT THE AUTHOR

Seema Shah, Ph.D. is the founder and principal of **COMM|VEDA Consulting**, a consulting firm that provides research, writing, and project management services to mission-driven organizations.

Dr. Shah's career spans two decades in the academic, nonprofit, and philanthropic sectors. Trained as a clinical-community psychologist, her work has touched on a wide range of topics, including diversity, equity, and inclusion, urban education, community organizing, women's rights, youth development, disaster philanthropy, and the global water crisis.

Innately curious about the world, Dr. Shah brings the broad perspective of a generalist to her work, along with specific expertise on social justice and human rights issues.

## SUGGESTED CITATION

Shah, S. (2020). *Partnering with Community for Better Philanthropy*. New York: COMM|VEDA Consulting.

Correspondence about this report can be sent to [commveda@gmail.com](mailto:commveda@gmail.com).

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