

NEW CHALLENGES GREATER CALLINGS

Exploring the Needs of Philanthropy in Times of Change



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CONTENTS

INTRODUCTION.....	2
METHODOLOGY	2
ACKNOWLEDGEMENTS	2
COVID-19.....	3
Economic Impact of the COVID-19 Crisis.....	3
Philanthropy's Response	3
Survey of Grantmaker Needs	4
Breakdown of Participants	4
HOW IS SOUTHERN CALIFORNIA PHILANTHROPY ADDRESSING THE CRISIS?.....	5
Prioritizing COVID-19 Response Grantmaking	5
What Grantmaking Looks Like for New Grants	7
Types of Support Related to COVID-19	7
Technical Assistance Programs	8
A LOOK INWARD	10
What Types of Training and Support Do Philanthropy Leaders Need for Their Organizations and What Are Their Staff Asking For?.....	10
Looking at the Most Important Needs	12
THE FUTURE OF STRATEGIC PLANNING	17
Internal Planning	17
What Will Planning Look Like?.....	17
Other Areas of Planning Interest	18
THE POWER TO CONVENE	20
NEXT STEPS.....	21
Supporting Grantees	21
Supporting Technical Assistance.....	21
Supporting You and Your Staff	22
Supporting New Ways of Convening and Creating Community.....	22
CALL TO REFLECTION	23
NOTES	24

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INTRODUCTION

THE CORONAVIRUS 2019 (COVID-19) has gripped the world's attention in a way that few other experiences have in recent history. Virtually the entire world is impacted directly or indirectly. The impact has been felt in all parts of the economy. Unemployment is at a record high rate. An increasing number of businesses, both small and large, cannot withstand the turmoil and are closing for good. Nonprofits have very real concerns about weathering the storm and keeping their doors open to serve a growing number of individuals and families in dire need.

For institutional funders, external pressure exists to increase funding support. However, data shows that internal pressures to manage losses in invested funds caused a retraction in funding during the Great Recession. Data from the National Committee for Responsive Philanthropy shows that the largest one thousand foundations decreased funding by up to 14% through 2009 and levels stayed that low for years afterwards.¹ It remains to be seen whether recent calls — that predate the virus — for foundations to be more accountable, equitable, and transparent in their grantmaking will result in increased donations.

While much of the focus during a crisis is on how philanthropy can help their nonprofit partners, little focus is placed on the needs of grantmakers themselves. Faced with internal and external pressures, what do philanthropy leaders and program staff need to be effective at this time?

One goal is to understand how grantmakers can help philanthropy professionals do their jobs within the societal constraints that a crisis, such as the COVID-19 pandemic, creates.

Community Works Consulting Inc. (CWC) conducted a survey of philanthropic entities in Southern California in late May and early June 2020 to address that question. Grantmakers were asked not only how COVID-19 changed their grantmaking, but also to share their own needs for knowledge, training, research, and support. One goal of this report is to understand how grantmakers can help philanthropy professionals do their jobs within the societal constraints that a crisis, such as the COVID-19 pandemic, creates. A second goal is to help grantmakers learn more about what others in their sector are facing and how they are adapting.

METHODOLOGY

CWC sent invitations to leadership and staff at grantmaking institutions, individual donors, Donor Advised Fund (DAF) holders, and wealth advisors making grants in Southern California. One hundred eleven institutions and individuals responded to the anonymous online survey. Participants were asked for basic demographic information related to their institution, position, and areas of funding. They were asked about their organization's COVID-19 outreach to date and what had changed in their grantmaking as part of this response. Respondents were then asked a series of questions related to the type of technical assistance support they are providing to nonprofit partners as well as the type of technical assistance they may need themselves.

ACKNOWLEDGEMENTS

WE WISH TO THANK each and every philanthropic professional who took the time to thoughtfully respond to the survey. This report would not be possible without your time and investment. Our thanks to [Southern California Grantmakers](#), [Orange County Grantmakers](#), and [LA Community Leaders](#) for sharing the survey.

COVID-19

IN LATE 2019, reports began to circulate about a virus that had been identified in China with the potential to reach pandemic status. The Coronavirus 2019, or COVID-19, began to surface in the United States in January 2020 with the first deaths reported in February. In California, the first cases were reported on January 26 and by March 4 a state of emergency was declared. Two weeks later, a mandatory stay-at-home order was enacted. While at times it seemed like the world was moving in slow motion, in only a matter of days the enormous public health and economic impact of the virus became apparent.

In early March, many businesses, including foundations and nonprofits, had already begun to move their employees to work-from-home status. For nonprofit organizations, this shift meant closing their doors to their clients, customers, and audiences while scrambling to offer critical services virtually. By early April, philanthropy began to mobilize efforts around COVID-19 response and relief efforts.

Economic Impact of the COVID-19 Crisis

In the weeks leading up to the crisis, the Dow Jones Industrial Average² (the Dow) saw record highs. As late as February 19, 2020, the Dow was above 29,000. The following week, the Dow began a precipitous drop. By the time mandatory stay-at-home orders were put in place, the Dow had sunk to 20,000 (the same level as in December 2016).

A reduction in economic activity occurred as a result of employees working from home and restrictions placed on restaurants and other service and retail establishments. Since January 2020, nearly one-third of the global population has experienced lockdown.³ In March, the U.S. saw 10-million workers lose their jobs. Early estimates suggested that unemployment could reach 32%, or 47 million jobs lost.⁴

In April, Charity Navigator, an organization that evaluates charitable organizations, conducted a survey of the nonprofit sector.⁵ Among their key findings, 83% of nonprofit organization respondents had already faced financial hardship and they expected revenues to decline on average by 38% going into June. Contributing to the decline in revenue was the cancellation of fundraising events. With springtime a high season for fundraising events, 75% of respondents said they had to cancel or postpone events.

Many nonprofits were faced with cutting programs or reducing services. Organizations supporting safety net needs, however, saw increased demand for services. Even in the face of economic pressures, the overwhelming majority of nonprofits at that time were working to keep staff. Seventy-three percent said they had not laid off staff and did not intend to do so.

Philanthropy's Response

Faced with a third economic crisis in only 20 years, U.S. philanthropy had an opportunity to draw on its previous experiences and offer support in real time as the effects of the pandemic became apparent. The National Center for Responsive Philanthropy, using data gathered by Candid, reported that nearly \$700 million had already been allocated for COVID-19 response efforts by institutional philanthropy within the first month of the crisis.⁶

The Council on Foundations encouraged foundations across the nation to sign [Philanthropy's Commitment During COVID-19 Pledge](#). To date, close to 800 foundations have signed the pledge.⁷ Among the actions that the pledge encourages are:

- Loosen or eliminate restrictions on grants by converting program grants to unrestricted support; accelerating payments; and understanding that project deliverables may be impacted due to cancellation of in-person programming or events.
- Provide unrestricted support.
- Reduce, postpone, or eliminate reporting requirements and site visits.
- Contribute to community-based emergency response funds.
- Communicate proactively and regularly with applicants, grantees, and others about decision-making processes.
- Commit to listening to partners, particularly from those communities most impacted and often least heard, and uplift their voices to the greater community.
- Support as appropriate the advocacy work grantees are doing around public policy changes to ensure equitable government deployment of funds, services, and information; particularly around the nonprofit efforts to secure Coronavirus Aid, Relief, and Economic Security Act (CARES) funding and policy efforts.
- Incorporate these practices as part of long-term grantmaking strategies that focus on equity during stable times as well.

Survey of Grantmaking Needs

While much has been examined regarding philanthropy's response to supporting nonprofit organizations and the communities they serve, gaps remain regarding the internal needs of philanthropy during a crisis of this nature. What knowledge, research, and skill sets are needed by grantmakers to do their jobs more effectively? What are grantees asking of them? What gaps in technical assistance are foundations encountering as they look to provide a complete portfolio of support for their grantees?

CWC conducted a survey of Southern California grantmakers in late May through early June 2020. One hundred eleven institutions and individuals responded to the anonymous online survey.

In looking specifically at the internal needs of their foundation, survey takers were asked to assign a value to ten areas of training or support that the foundation may need and were given the opportunity to identify

other needs. Foundation leadership and grantmaking staff also answered separate questions, respectively. (*What type of training and support does your staff need at this time? What type of training and support do you need at this time?*) Respondents were also given the opportunity to provide open-ended answers to three questions:

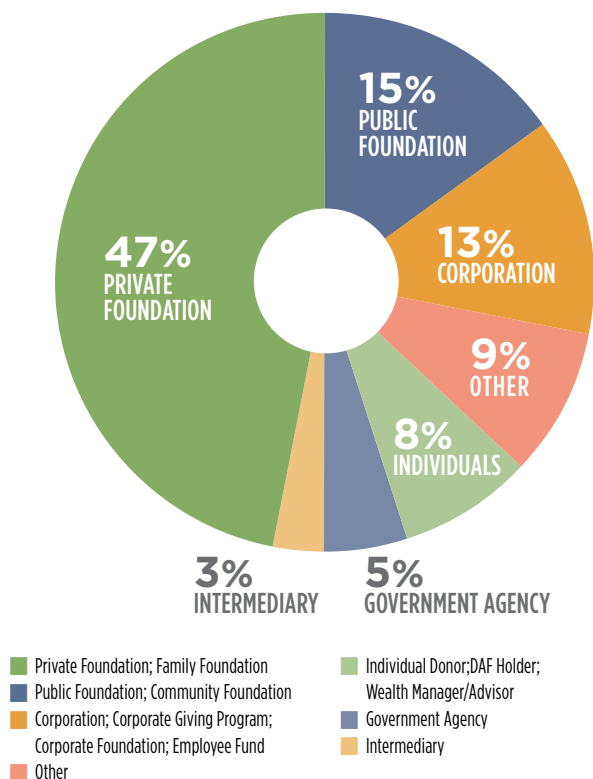
- What types of research would you find helpful?
- How might strategic planning change in a post-pandemic world for you and your grantees?
- Do you see yourself engaging your power to convene in new ways and what type of support do you need to make that happen?

Individual donors, DAF holders, and wealth managers/advisors were asked separately about their response to the crisis; the types of support they would like to provide for grantees; and learning opportunities for themselves.

Breakdown of Participants

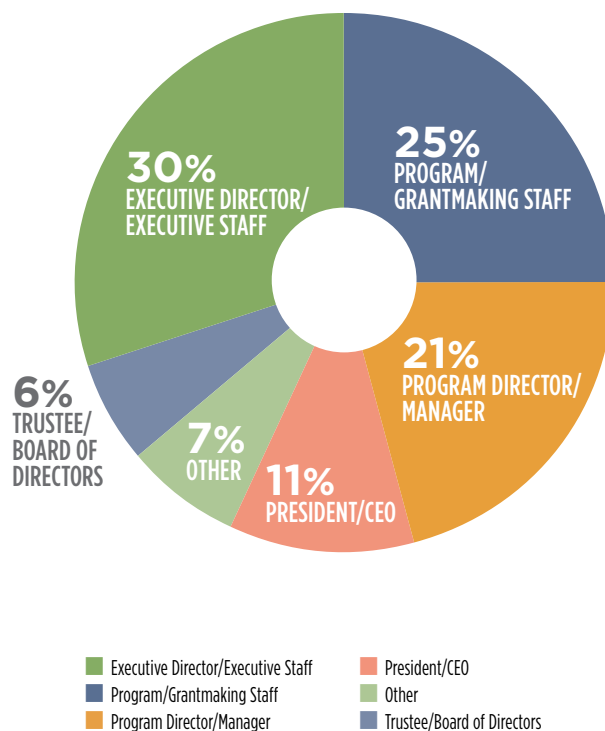
TYPE OF PHILANTHROPIC ORGANIZATION

111 Responses



WHAT IS YOUR ROLE?

98 Responses



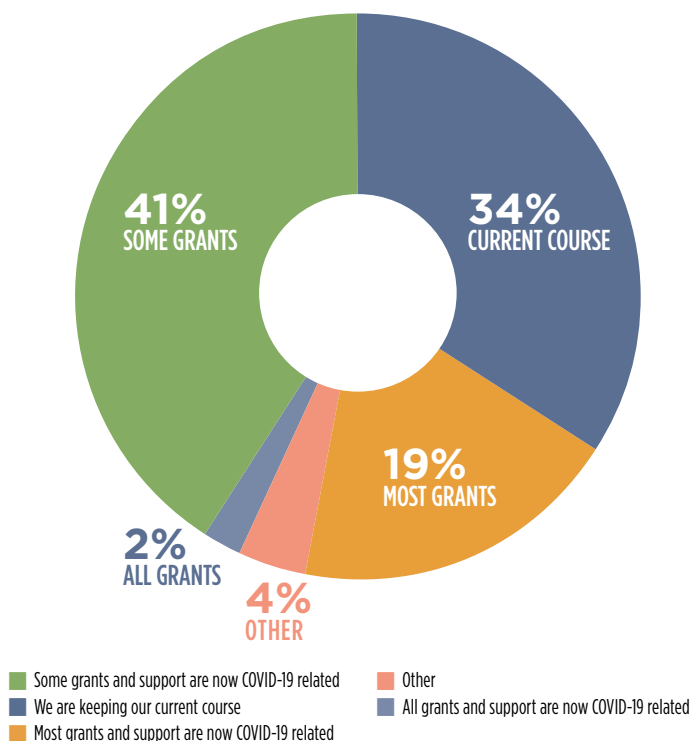
HOW IS SOUTHERN CALIFORNIA PHILANTHROPY ADDRESSING THE CRISIS?

THE COVID-19 CRISIS has required foundations and nonprofits to change the way they operate. From redeployment of funds and grants, to staff working from home, the challenges require adaptability, flexibility, communication, and cooperation. The survey first looked at changes in grantmaking.

Prioritizing COVID-19 Response

Nearly two-thirds of all foundation respondents saw immediate changes in their funding priorities, with 41% of all respondents saying that at least some grants and support would now be directed toward COVID-19 response. Slightly more than one-third of those surveyed (34.3%) indicated they were going to stay the course with their existing funding priorities. This mix lends itself well to providing not only COVID-19 response funding, but also a certain threshold of stability for grantees to continue non-COVID-19-related programming and operations.

HAVE YOU CHANGED YOUR FUNDING PRIORITIES?



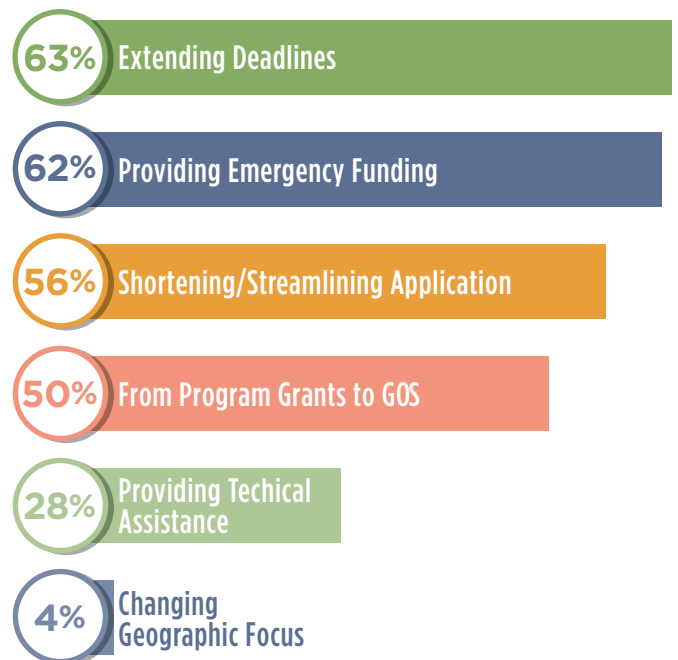
Survey participants were asked to provide information about shifts in grantmaking across six dimensions. They could select as many as applied:

- Providing emergency funding
- Providing technical assistance
- Extending deadlines
- Changing geographic focus
- Moving from program grants to general operating support (GOS) grants
- Shortening/Streamlining applications

At least half of the foundations indicated a willingness to make shifts in grantmaking.

Across all but two dimensions, at least half of the foundations indicated a willingness to make shifts in grantmaking. Twenty-eight percent of funders indicated interest in providing technical assistance as a new type of support. It is important to note that some funders already provide technical assistance and capacity-building grants, and many are already funding GOS in lieu of program support. Only four percent of those responding were considering a change of geographic support, which indicates a commitment to the Southern California region.

SHIFTS IN GRANTMAKING



THE INDIVIDUAL DONOR SECTOR

Individual donors, wealth managers and advisors, and DAF holders provided feedback on how they are managing through the COVID-19 crisis. This subset of nine respondents provided the following input:

- Donors were split between making no changes in their outreach strategy and making slight shifts. The largest shift was to support emergency funding for their grantees.
- More than half of the individual donor respondents saw GOS as an important way to provide support to nonprofits at this time.

When asked to identify the types of organizations or programs they would be open to supporting,

specifically around COVID-19 response, they indicated the following:

- Medical research
- Telehealth
- Testing and contact tracing
- Food insecurity, including food banks for pets
- Virtual program delivery

When looking at areas of capacity building for nonprofits (aside from GOS), donors and advisors saw the following as important:

- Advocacy
- Inclusive and equitable recovery
- Nonprofit sustainability
- Communications
- Strategic planning

A deeper look at the needs of [INDIVIDUAL DONOR SECTOR](#).

When asked to identify areas of support to which they would be shifting funding, in the short term or during a response phase, respondents identified COVID-19-related issues the most. Many of these topics were aligned with what grantees were already doing. Much of the work was centered on safety-net concerns of health, housing, and income. Respondents noted an emphasis on marginalized and underserved communities. Foundation leaders and staff recognized the need for direct financial assistance, especially related to loss of income and unemployment due to the virus. Respondents showed an interest in identifying specific and unique funding opportunities, such as providing a one-time grant to support Los Angeles County's efforts to provide childcare to frontline workers.

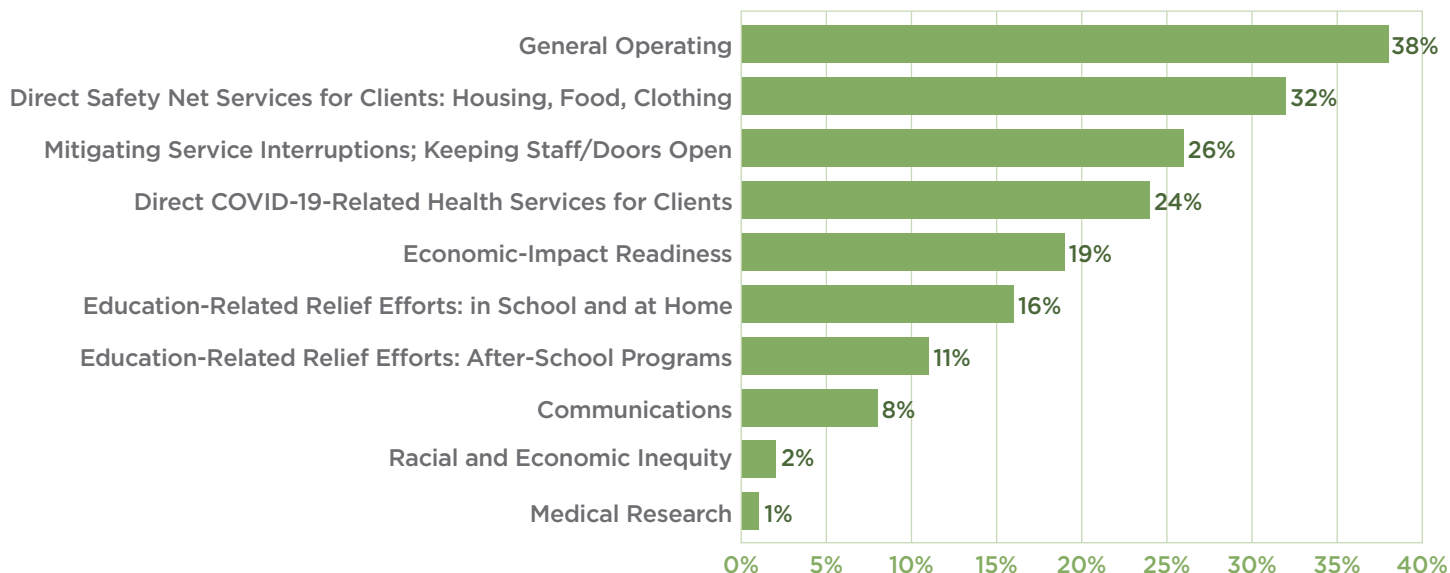
As funders were shifting money towards the area of health, the grants that foundations were looking to make were COVID-19 related, but not specific to medical research on the virus. Funders were more interested in how COVID-19 may be impacting Queer and Black, Indigenous, and People of Color (BIPOC) communities and under-resourced communities. Examination of the social determinants of health were important, particularly the intersection of housing and health. For instance, programs to support homeless health services and emergency housing ranked high.

Another area of expressed interest is in helping nonprofits with technology capacity. Key supports include hardware integration and upgrades, such as Internet access as it relates to the digital divide and equitable access to technology. Whether for education/distance learning, client service delivery, or cultural performances and events, the need to move programming online was recognized as an important factor in whether agencies would be able to not only survive but also thrive during this time of crisis and recovery.

Respondents overwhelmingly indicated that they would continue to support existing grant programs and new grant programs, and would be willing to repurpose existing grants.

What Grantmaking Looks Like for New Grants

WHAT CAN NEW GRANTS AND ADDITIONAL SUPPORT BE USED FOR?

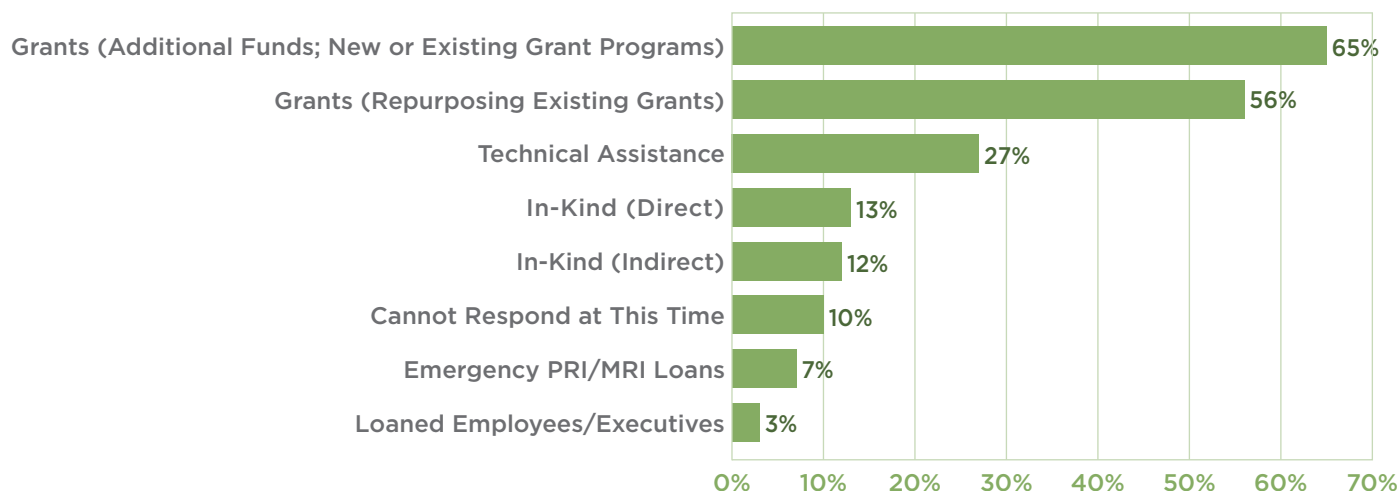


In looking at more long-term responses for organizations changing grantmaking priorities, the survey participants were asked to select the type(s) of grant purposes they would be open to funding. Over 38% of respondents were now open to providing GOS grants, considered a grantmaking best practice. As Grantmakers for Effective Organizations points out in its *Vision for Smarter Grantmaking*,⁸ “Long-term, unrestricted support is not only an indicator of trust, it helps nonprofits adapt to the changing conditions around them.” GOS support provides that important flexibility that enables nonprofits to adapt and respond rapidly in moments of crisis and uncertainty.

Respondents overwhelmingly indicated that they would continue to support existing grant programs and new grant programs, and would be willing to repurpose existing grants (i.e., changing from programmatic funding to GOS). Respondents also expressed an openness to provide a variety of program-related support around COVID-19, including emergency funding for safety-net issues, maintaining staff levels, and supporting operations. Also mentioned was interest in helping organizations with financial restructuring, such as mergers, acquisitions, and debt refinancing. A number of participants indicated support for collaborative efforts with other foundations and pooled funds.

Types of Support Related to COVID-19

WHAT TYPES OF SUPPORT ARE YOU OFFERING OR PLANNING TO OFFER?



Technical Assistance Programs

More than a quarter of the foundations surveyed said they would provide technical assistance, which offers funders another way to help grantees build capacity for their work, become more efficient, and maximize philanthropic investment. It can take many forms, such as funding capacity building, providing capacity-enhancing training, or directly advising nonprofits; it can be offered one-on-one or through cohort models.

Participants were asked two similar questions:

- If you are providing or would like to provide Technical assistance/Capacity building/Capacity extending programs for your grantees, what are they?
- Regardless of your ability to support these types of requests, what are you hearing from grantees and other organizations as to the types of Technical assistance/Capacity building/Capacity extending support they need or would like right now?

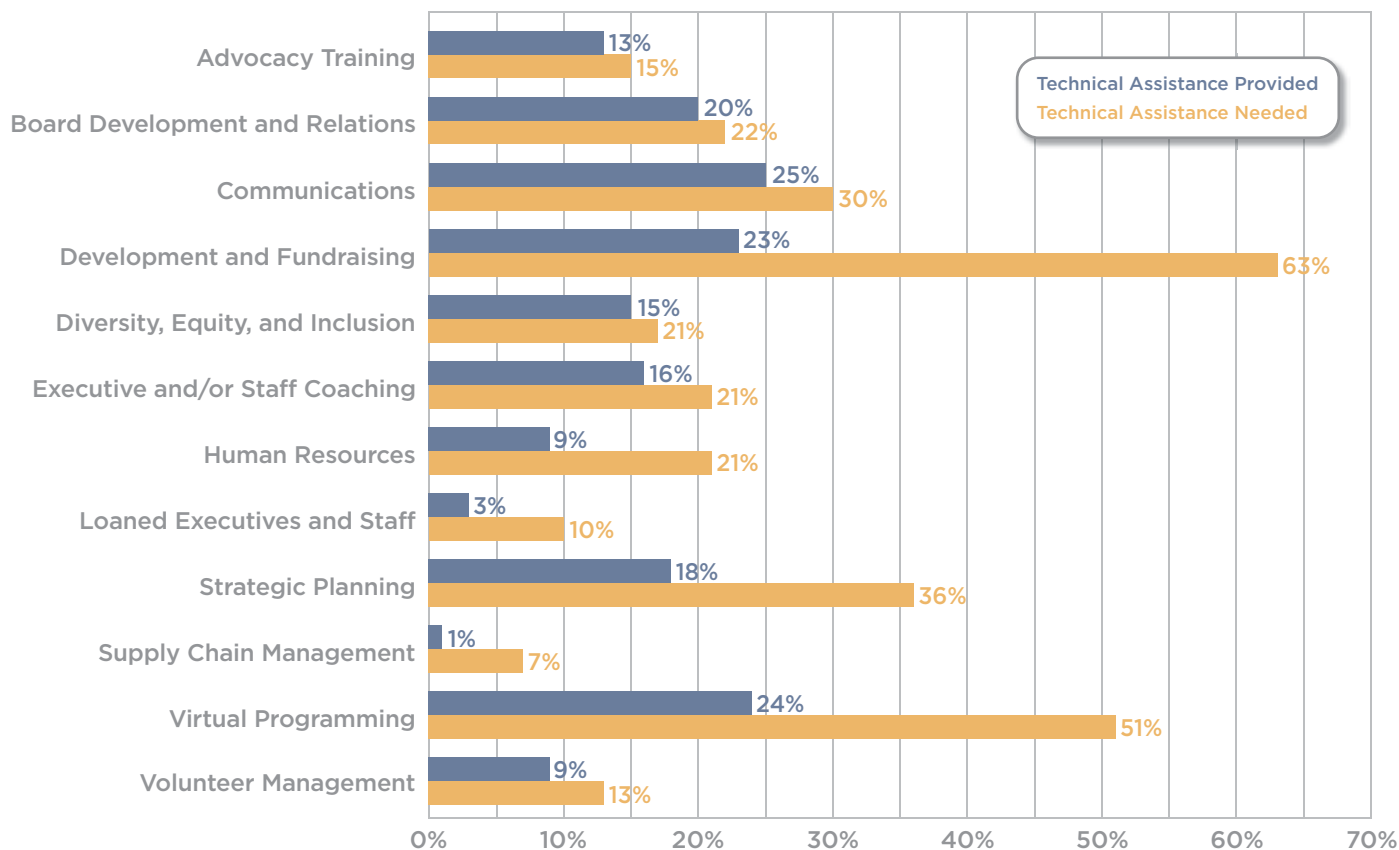
Across the board, foundations providing technical assistance were open to a variety of programs. However, a marked difference can be seen between what is or what could be provided and what

foundations were hearing from their grantees as to the type of help they really need.

The largest gap was in supporting development and fundraising training. Second was strategic planning. These two areas are essential to how nonprofits operate and to their sustainability. They are also two areas that many foundations inquire about during the grantmaking consideration process. Given the significant impact of COVID-19, and the central role these two activities play in a nonprofit's stability, nonprofits are clearly voicing their need for this type of training and support. However, funding and technical assistance support are not matching the level of request. This calls for further exploration.

Nearly 80% of nonprofits are expecting to lose money from fundraising because of the virus and 64% have already seen losses.

TECHNICAL ASSISTANCE PROVIDED VS. TECHNICAL ASSISTANCE NEEDED



A recent report from Inside Philanthropy found that nearly 80% of nonprofits are expecting to lose money from fundraising because of the virus and 64% have already seen losses.⁹ These stress points are nothing new. Nearly a decade ago, CompassPoint Nonprofit Services and the Meyer Foundation published the report, [Daring to Lead 2011](#). The report examined how nonprofit leaders managed coming out of The Great Recession and offers a window into what nonprofits are likely to experience with today's crisis. The report showed that 84% of nonprofit leaders reported negative organizational impact. "The recession has amplified the chronic financial instability of many organizations, causing heightened anxiety and increased frustration with unsustainable financial models."

The same report found that new leaders and BIPOC leaders were disproportionately affected by issues around finance and resource development. BIPOC-led organizations were one-and-a-half times more likely to be impacted by the recession than white-led nonprofits. The report also provided a dismal glimpse into the role that boards were filling when it came to fundraising. Less than half of the leaders reported that someone on their board helped with donor identification or cultivation. Only 44% of boards achieved 100% giving.

The report concluded with a call to action to support greater understanding of nonprofit financial stability. Yet a decade later, nonprofits are still faced with the same issues of undercapitalization and the need for development and fundraising training and support.¹⁰ The reasons for that skill gap are many — and not wholly the responsibility of the philanthropic sector — but philanthropy can go a long way to support the strengthening of these important business muscles.

In times of economic or public health crises, fundraising training and support of development staff and boards of directors are certainly in the best interest of grantmakers.

Nonprofits need to understand traditional fundraising methods but also how to alter these methods when faced with challenges such as COVID-19. In times of economic or public health crises, fundraising training and support of development staff and boards of directors are certainly in the best interest of grantmakers. By ensuring an organization's ability to raise money effectively, identify sources of revenue, and adjust to unusual circumstances, donors provide protection for their own investments in the organization and the societal return on that investment.

Traditional strategic planning also presents a set of problems since much of the planning — like elements of fundraising — typically rely on in-person interactions. There are also calls to integrate scenario or contingency planning into strategic planning processes, as well as concerns that the length of traditional plans (3–5 years) is too long in our current environment. A deeper dive into strategic planning appears later in this report.

An area of technical assistance support that has grown out of the crisis, for both foundations and nonprofits, is the need for information, training, and support to move to virtual programming and work environments. The survey shows more than 25% gap between requests for this support and foundations providing that type of technical assistance. Enhanced virtual capacity is needed for delivery of client services, performances, fundraising events, board and staff meetings, distance education and training, site visits, grant reviews, and virtual site visits, just to mention a few areas of need. Both nonprofits and foundations share a vested interest and need to develop an understanding of the available technology and software delivery mechanism, as well as related concerns like delivery efficacy, best practices for utilizing the medium, and legal and privacy questions. This shared need provides a unique opportunity for the philanthropy sector to participate in learning alongside their nonprofit partners.

The survey did not delve into the reasons why the sector is reticent to support technical assistance for development and fundraising, strategic planning, or virtual programming. The philanthropy sector has the opportunity to address the gaps between need and investment particularly with a lens on equity as we are witnessing the inequities faced by organizations run by Queer and BIPOC leaders.

A LOOK INWARD

What Types of Training and Support Do Philanthropy Leaders Need for Their Organizations and What Are Their Staff Asking For?

Institutional funders face many of the same challenges as their grantees. Similar stressors include reduced budgets, keeping staff employed, adapting to new working conditions, and responding to constituents in need. While some foundations can rely on large endowments with diversified investments to minimize risk, operating and public foundations that are also fundraising institutions find themselves in a similar position as their grantees.

What do foundations need to continue to do their good work? To find out, this survey presented foundation leaders and staff similar but separate questions.

- Leaders were defined as trustees/directors, presidents and CEOs, executive directors/executive staff, and program directors/managers
- Leaders were asked, “As an organizational or program leader, how important are the following types of training or support that you and/or your staff need now in order to carry out your mission during this crisis?”
- Staff were defined as — program officers, associates, assistants, and other program staff positions
- Staff were asked, “What are the types of training or support that you wish your organization provided at this time that would help you to be a more effective grantmaker?”

Survey participants were provided with ten areas of learning or training and were asked to assign a value of importance. Values assigned were on a five-point scale with an assignment of one (1) being least important and five (5) being most important. The areas rated were:

- Advocacy training
- Development and fundraising
- Diversity, equity, and inclusion (DEI)
- Executive and staff coaching
- Human resource practices
- Mental health strategies
- Research

- Staffing
- Strategic planning
- Understanding COVID-19 response models

Staff and leadership responses were tracked separately to determine the similarities and differences in the responses between the two groups.

A few areas stood out where leadership and staff rated the importance differently. For example, the human resources practices assistance trended higher in importance for grantmaking leadership than it did for staff. Other significant differences include coaching, advocacy, and, to help meet increased demand, staffing support.

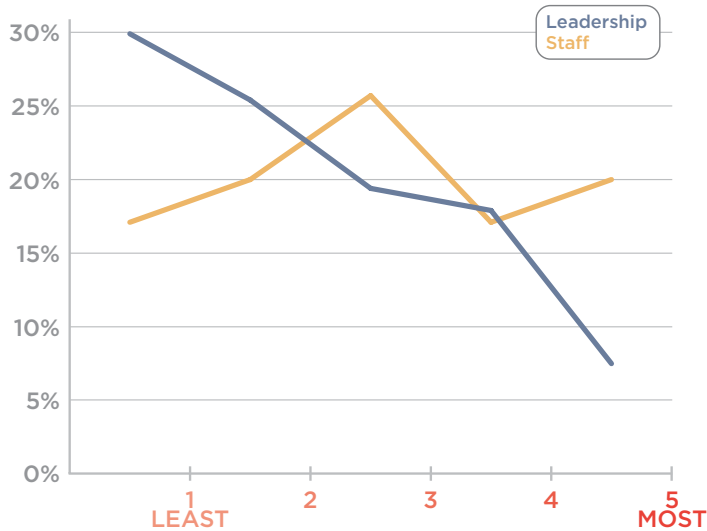
EXECUTIVE AND STAFF COACHING



Both leadership and staff see value in coaching, but staff rated it as “most important” by more than threefold. This might be a significant time for foundation leaders to consider providing coaching support for staff as a way of developing greater confidence in their grantmaking and providing a valuable professional development experience.

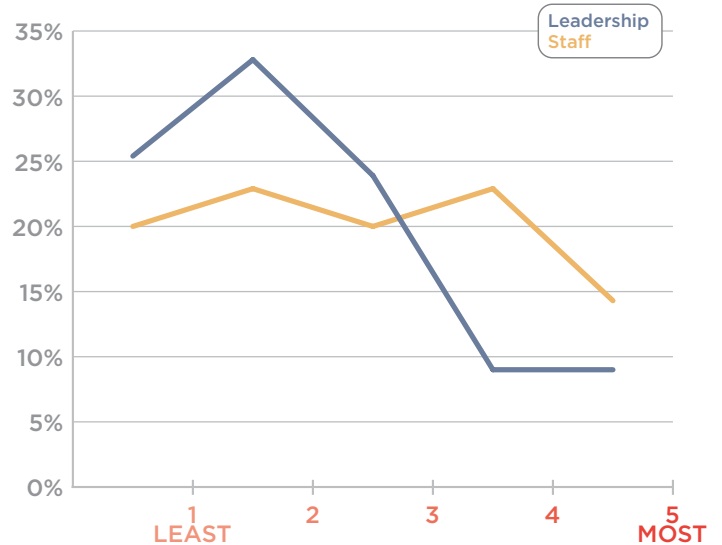
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ADVOCACY



Staff scored Advocacy training as more important than leadership did, which may speak to their more direct involvement with the day-to-day operations of the nonprofit grantees.

STAFFING



Staffing support to meet the increase in demand was scored higher by staff than by leadership. This may speak to the direct impact staff experience as they work to adjust to changes in grantmaking, greater needs of grantees, and increases in workload related to COVID-19.

A CLOSER LOOK: INTERNAL SUPPORT NEEDED (WEIGHTED)



When weights of one through five were applied to the corresponding value assignments of each category, the trend lines appear to match in some areas, yet further highlight differences in others.

Finally, when placed in rank order, the weighted values show more clearly the differing levels of importance placed upon types of training and support needed.

INTERNAL SUPPORT NEEDED RANKED BY IMPORTANCE

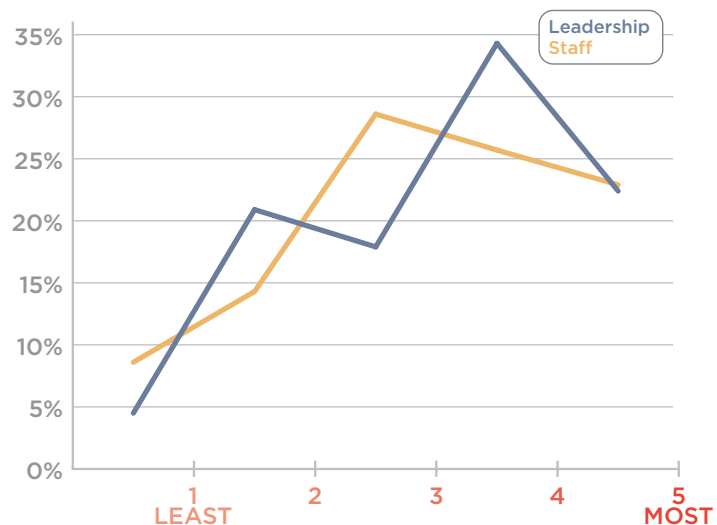
LEADERSHIP	STAFF
DEI in the grantmaking process	Understanding COVID-19 Response Models
Mental Health Strategies	Executive and Staff Coaching
Executive and Staff Coaching	DEI in the grantmaking process
Understanding COVID-19 Response Models	Strategic Planning
Strategic Planning	Mental Health Strategies
Human Resources Practices	Advocacy Training
Development and Fundraising	Staffing (To meet increased demand for grantmaking)
Research	Development and Fundraising
Advocacy Training	Research
Staffing (To meet increased demand for grantmaking)	Human Resources Practices

Looking at the Most Important Needs

Diversity, Equity, and Inclusion

Prior to CWC's survey, many grantmakers in Southern California participated in Southern California Grantmaker's DEI trainings, specifically in implicit bias. The survey closed just as protests across the nation began to take place, sparked by the death of George Floyd at the hands of Minneapolis police officers. The video, and the subsequent protests and public discussions, were a stark reminder of the disparities within our justice system. It would be interesting to speculate how DEI would have scored had the survey taken place a few weeks or a month later. Given how highly it ranked for leaders and staff, we are confident in saying that DEI training and support has established itself as important for philanthropy professionals and has been on their minds for some time.

DIVERSITY, EQUITY, AND INCLUSION



The COVID-19 crisis has illustrated how inequities are having a staggering and deadly impact on underserved communities, Queer, and BIPOC communities. Nationally, just prior to the survey, Black people were dying from the virus at a rate 2.5 to 3 times higher than the rate for other groups.¹¹ In Los Angeles, 12.5% of the people who have died from COVID-19 were Black even though they only make up eight percent of the population.¹² Incidences of the virus are also disproportionately higher in the Latino community.¹³ Further, Asian Americans and Pacific Islanders have been targeted because of xenophobic fear-mongering over the origins of the virus, and reports of hate crimes are spiking.¹⁴

For private foundations, addressing equity in grantmaking is imperative as public debate raises questions about how wealth has traditionally been accumulated in this country.

With all that is happening, it is not surprising that DEI is top of mind. Corporate funders are looking at the ways they support communities where their customers live and how corporate citizenship programs can act more equitably and responsibly in those communities. For private foundations, addressing equity in grantmaking is imperative as public debate raises questions about how wealth has traditionally been accumulated in this country.

Seeking out DEI assessments, trainings, and coaching that look at all aspects of philanthropy and its practices becomes all the more important as the COVID-19 crisis drags on. As the field gains greater understanding of discrepancies in funding offered to organizations led by and serving Queer and BIPOC communities, these investments become more critical.

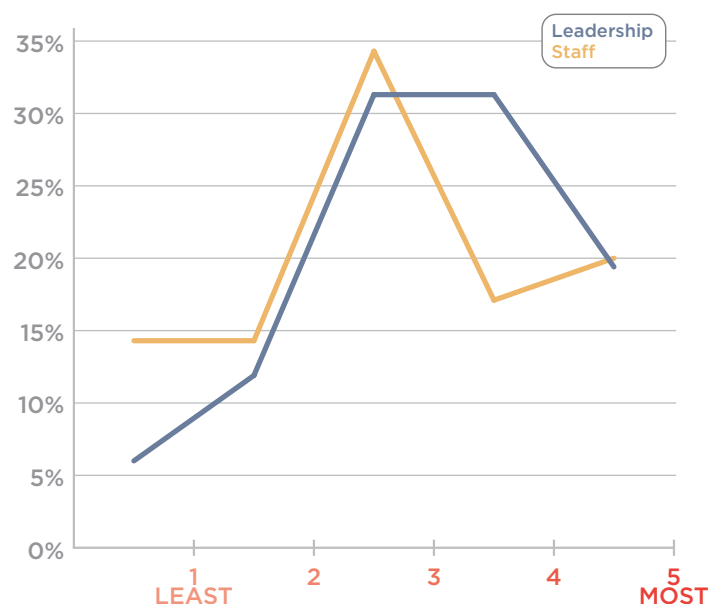
In addition to traditional DEI-related support, one of the efforts gaining in popularity in this arena is

the work of trust-based philanthropy to address the inherent power imbalances between foundations and nonprofits. Grantmakers are encouraged to examine their grantmaking values and practices through a lens that can help repair imbalances in power and control, and move the sector to a more equitable nonprofit-funder ecosystem.¹⁵

Mental Health Strategies

Like all employers, foundations and corporate giving programs are tasked with doing business in a different way. Change is difficult in the best of times. But the pandemic — combined with the current state of political strife, protests, and associated images of violence related to the recent protests — is a recipe for mental health issues. Employees are also experiencing the stressors of an unplanned but immediate shift to working from home that has now become a long-term shift. Additional stressors include a lack of personal interaction with colleagues; reductions in staff; fear and anxiety directly related to the disease; caring for loved ones; parents managing homeschooling; and technology challenges. This unusual combination of stressors accelerates workplace burnout and leads to mild to more severe depression. Bravo to leadership in the sector for prioritizing the need for mental health strategies and wanting to provide support for their employees.

MENTAL HEALTH STRATEGIES



MENTAL HEALTH

There are several ways that employers can help ease the minds of employees during this time. A few resources include:

- The [Mental Health Foundation](#) provides reminders about the importance of supporting mental health in the workplace as well as lists of best practices and resources.

- The CDC published an article to help employees understand and manage their stress. [“Employees: How to Cope with Job Stress and Build Resilience During the COVID-19 Pandemic”](#) was published barely two months into the crisis. The report provides information on work-related stress and provides lists of coping practices and outside sources of information and support.

Investing in ways to remove barriers that impede productivity responds directly to what foundation staff said they need. For instance, the call for staffing support to address increased demand is a sign that this is an area of stress. It can be addressed in a multitude of ways, from restructuring to hiring additional support staff, to engaging contracted program officer support. The high interest in DEI support can be seen as a call to better understand how to develop equitable work environments and practices, both of which would reduce stress for many employees.

Technology can be one of the biggest stressors of working from home. Ensuring that employees have the hardware, software, training, and a reliable internet connection can ease some of these burdens. Employees with families may also be trying to manage a household full of stress that includes their children's distance learning and disappointments around family milestones and events. Allowing them time to work out these issues is important.

Executive and Staff Coaching

The most important role for any manager is to ensure the best performance of the organization's most valuable resources: its people. Ask any athlete at the top of their game and they will tell you the importance that coaching plays.

It is not surprising that at this moment foundation leaders see coaching as one of the most important supports they can provide for themselves, their managers, and their staff. The fact that staff rated this nearly three times more important than leadership is important for leadership to consider. Nearly all the internal support dimensions surveyed have roles for coaching built into them.

Ten years ago, CompassPoint Nonprofit Services, in partnership with Grantmakers for Effective Organizations, Leadership that Works, and BTW *informing change*, conducted a study on the need and efficacy of coaching for nonprofit organizations. Through the [Coaching and Philanthropy Project](#), the report's authors made the case for philanthropic support of coaching. The report concluded:

“A variety of reports and research efforts have documented the urgent leadership challenges facing nonprofits today. Nonprofit leaders are burned out; young and emerging leaders are not sure they want to stay in the sector because of the low pay, work-life imbalance and other concerns; and the sector needs to attract and develop hundreds of thousands of new senior managers as a result of its expanding complexity and size.

In the face of these challenges, coaching can provide nonprofits with a powerful, cost-effective strategy for developing and supporting current and future leaders. In addition, by helping leaders manage and reduce stress and find answers to personal and organizational challenges that keep them up at night, coaching can make an important contribution to keeping more good people in the sector and helping them grow as leaders.”

In examining that conclusion, one can easily replace ‘nonprofit’ with ‘foundation’ and see the correlation. Foundations and grantmaking organizations face many of the same stressors, particularly at a time when the landscape, methodology, and practice of grantmaking is changing so rapidly.

Coaching is an important part of developing any team. Foundation leaders that recognize this need

are congratulated for taking these bold steps. Those who have yet to adopt a coaching plan for staff or leadership (including board members) would be well advised to learn more about how coaching can help improve the team's skills, motivation, and morale.

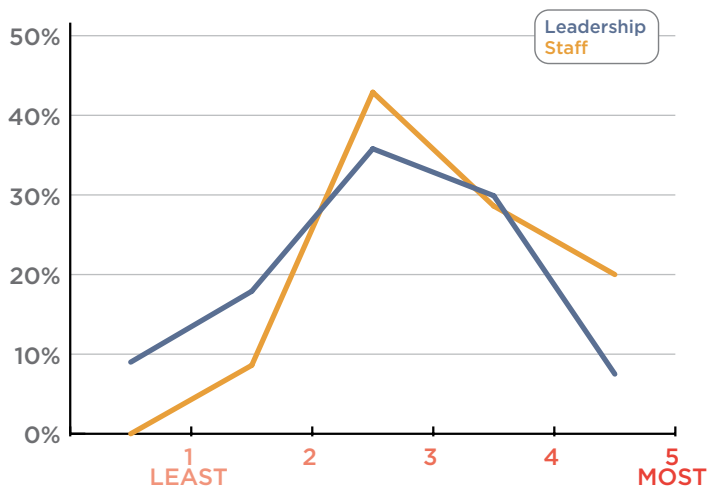
“Each person holds so much power within themselves that needs to be let out. Sometimes they just need a little nudge, a little direction, a little support, a little coaching, and the greatest things can happen.”

—Pete Carroll,
USC and Seattle Seahawks Head Coach

Understanding COVID-19 Response Models

For foundation staff on the frontline of long-term interaction with community organizations, understanding the various ways support can be deployed means diving headfirst into uncharted waters. Unless foundations have contingency plans that can help guide grantmakers in rapid-response grantmaking (or unless they have the authority to trigger rapid responses), program staff must navigate community demands alongside trustees.

UNDERSTANDING COVID-19 RESPONSE MODELS



Assuming that program staff do not have carte blanche to make community investments, it may be helpful to create a real or virtual matrix that takes into account the following:

- Support for existing grantees — How do we protect investments in community organizations that have already been made? Does abandoning those grantees put them at risk of closing their doors?
- Support for new grantees — How do we engage new grantees doing work around the virus and its various effects (health, economic, safety net, etc.)?
- Relief versus recovery — Will efforts focus on immediate funds out the door to help the most vulnerable populations as well as to create a public health infrastructure to address the virus? Or, will the focus be on economic recovery? Most foundations are figuring out ways to do both. However, that begs the question, “What is the inflection point between the two?” In other words, when does the shift from relief to recovery happen? Do the two efforts look different? Can they be managed simultaneously?
- Funder collaboration — What are the options for supporting collaborative efforts with other grantmakers? How does that make sense for the foundation? Are collaborative efforts even allowed to be supported?
- Trusting change — Will trustees hold program staff accountable for outcome measures and how is that translated to potential grantees? Can reasonable accommodations in grantmaking policy that do not require trustee approval be made to make the grant process more streamlined? Much of the success of grantmaking will depend on the level of trust among foundation trustees, staff leadership, program staff, and community partners during a time of stress and change. In ranking Understanding COVID-19 response Models so highly, grantmakers are looking for ways to make the best, most informed decisions they can. It also points to a gap in knowledge that many feel.

Time, discussion, communication, and sharing are critical in addressing this concern. Carving out time and access for grant staff to share information and brainstorm responses will be essential moving forward. Actively supporting efforts that bring together grantmakers may be critical as the pandemic moves into 2021 and the economic recovery moves

well into the future. Engaging independent convening and facilitation support can make both of these efforts more effective.

Much of the success of grantmaking will depend on the level of trust among foundation leadership, program staff, and community partners during a time of stress and change.

Suggestions from Survey Participants

Survey participants were given the opportunity to provide more specific feedback regarding the topics explored in the survey. A few examples follow:

Data and Research — A participant recommended the development of a resource that collects data and information on what nonprofits are doing and experiencing. A localized, single source for this data allows grantmakers to access collective information from the nonprofit sector instead of reaching out individually to grantees who are in the midst of managing crises. The latter drains resources from the nonprofits and takes time away from the mission-driven work at a moment when that work is most critical. A similar request was made to create a system to streamline research that helps eliminate redundancies in the sector.

Two research topics suggested include conducting a landscape analysis of changing government funding streams and looking at which organizations and sectors have faced the most significant layoffs due to the crisis. Other topics of research mentioned include understanding: the specific effects of the virus on children and families and those long-term implications; what is being done now to support the Arts; and what funding looks like for that sector; and what strategies are available for arts education delivery under shifting school-at-home orders. Additional types of research that grant staff suggested include:

- Community engagement during isolation
- Landscape analysis of mental health needs of L.A.'s most vulnerable populations and the nonprofits serving them
- Map highlighting impacted regions by health, education, housing, arts, environment, etc. Specifically utilizing ArcGIS mapping technology¹⁶
- Survey designed to help request information from grantees
- Economic forecasts by sector and region

Looking Outside Our Sector for Answers — To fulfill their commitment to support their grantees and to help build resiliency and capacity, one participant suggested looking at other sectors. “What are well-resourced corporations doing in terms of long-term planning? We tend to only look within the nonprofit sector for solutions. But this event has been unprecedented for all sectors and other sectors may have innovative and helpful solutions. I would like to have a broader perspective.”

Financial Capacity — In recent years, the philanthropic sector in Southern California has supported efforts for nonprofits to learn about the importance of building cash reserves,^{17, 18} and full-cost accounting.¹⁹ This respondent highlights the importance of continually sharing information and reminding people of the importance of such capacity-building efforts: “[T]he unprecedented times of COVID-19 should lead all CBOs/nonprofit service providers and funders on how to ensure CBOs/nonprofit providers build cash reserves to help sustain the operations and services in order to respond to disasters and other unforeseen situations.”

“[Nonprofits] know best what they need. This is not a time to impose burdensome requirements on organizations seeking a grant. This is a time to be responsive.”

Equity in Grantmaking — One participant took the opportunity to remind their peers, “It would be helpful if more foundations did not use financial stability and sustainability as the sole criteria for supporting an organization, or decided to pull back on their support during this crisis; if anything, more support is needed, as well as an intentional focus on equity since this pandemic has exacerbated lack of access to health care, disproportionate rates of mortality for African Americans, etc.” Another pointed out, “[Nonprofits] know best what they need. This is not a time to impose burdensome requirements on organizations seeking a grant. This is a time to be responsive.”

Professional Development — Training areas specifically called out by staff included:

- Communications and media training
- Program evaluation and effectiveness
- Telework and management models for remote employees
- Implicit bias training for executive leadership managing Queer and BIPOC staff

THE FUTURE OF STRATEGIC PLANNING

GRANTMAKERS were asked how they think strategic planning needs to change for themselves and for their grantees. Although a variety of viewpoints emerged, there was agreement in recognizing that planning was shifting away from traditional methods.

Internal Planning

While most respondents shared comments on grantee strategic planning, many funders also spoke to their own strategies and needs for change.

One participant described feeling “overloaded” with managing pandemic response while their foundation is undergoing a strategic planning process and re-organization. Another funder lamented that planning seems “like a luxury” right now due to the overload of work being experienced at the moment.

Internal learning opportunities are a theme throughout the feedback in the survey. In responding to strategic planning inquiries, many funders shared that what was needed at the moment was more peer learning, particularly among grantmaking staff. Another recommendation was to create a toolkit that helps foundations understand and/or implement new ways to respond to changing needs. The toolkit could include

models for developing multi-year financial analyses so that funders can plan accordingly in the face of uncertain economic times. These types of planning tools could be developed to support foundations in creating new plans that offer more flexibility.

COVID-19 recovery is a concept that the sector is beginning to use and is reflective of the long-term commitments needed to recover from COVID-19 impact. Respondents recognize that strategic planning, whether they are going through it now or in the next two to three years, will have to address the aftermath of the virus. To plan well, they will need to monitor the sector to gain an ongoing understanding of what has changed in the environment and what continues to evolve. Creating a system of data collection and sharing around best practices will be important as more and more foundations begin to address internal planning.

What Will Planning Look Like?

The Logistics

Foundations see the process of strategic planning changing for themselves and their grantees. The most obvious change is in the logistics of planning. Strategic planning is a process that is best conducted with input from myriad stakeholders. Focus groups, interviews, brainstorming sessions, and retreats have all been part of the traditional process.

But how does one accomplish this in a COVID-19 world? Many organizations have already developed some competency around the technology for distance learning and meetings. Most, if not all, of us have participated in a ZOOM meeting at this point. Navigating the new social rules of videoconferencing (think: “Can everyone put themselves on mute?”) is probably much easier for the everyday user. Those tasked with coordinating meetings across different departments and organizations with individuals in different time zones and various hardware capabilities are going to require a different type of technical assistance. Product developers provide a great deal of generic training but a roadmap for strategic planning efforts (and other types of meetings and convenings) is something that has not been widely shared. Beyond the end-user experience, foundation IT staff also need the latest information on security measures and delivery of technology on home-based platforms rather than platforms designed for business.

Shifting Time Horizons

Because of so much uncertainty, foundation leaders and program staff see the need for strategic plans to cover a shorter period of time.

“I’ve never been a big believer in long-range strategic planning. I think long-range visions are critical, but it’s always felt strange to pretend that we can predict external conditions more than a year or two from now. This pandemic has highlighted that notion, and we’ll continue to hold long-range visions, but avoid detailed strategic plans for more than a year or two out.”

Traditionally, plans have been three-, five-, even ten-year plans. Those in active planning or who are about to undertake planning would be advised to focus on a shorter-term plan — one to three years. One foundation staff member advised, “The economic recovery phases will likely be in two- to three-year arcs and the longer-term recovery in a seven- to 10-year space. Organizations will also likely consider including additional sections on pandemic response until there is a vaccine widely available.”

Scenario, Contingency, and Planning Components

To paraphrase one of the responses to the planning questions: “This current situation is not changing. If it weren’t this, then it would be another crisis. How do we deal with this?” One answer is to integrate scenario and contingency planning into planning practices.

“This current situation is not changing. If it weren’t this, then it would be another crisis. How do we deal with this?”

Scenario/contingency planning was by far the most frequently mentioned type of planning activity that respondents thought would be needed going forward for their own organizations and their nonprofit partners. This type of planning — particularly in these trying times — is thought of as crisis or emergency

planning. However, scenario planning is just as important for positive situations, such as dramatic increases in funding and having a plan to scale programs. Scenario planning asks organizations to look at different aspects of their work and examine what would happen if any conditions around those aspects change. *What happens if individual funding goes up or down? What happens if program staffing becomes an issue? What happens if we lose or gain office/program space? How would a change in any of these factors or many others affect delivery of programs?*

With scenario plans in place, foundations and nonprofits hold a working framework of generalized potential outcomes. Foundations can then build contingency plans that take real world conditions and plug them into the scenarios created in the planning process to develop action plans. When looking for strategic planning help, it is recommended that scenario planning be one of the practices included in requests for proposals.

Along with scenario planning, other elements of strategic planning that were mentioned as important to the long-term sustainability of their own organization and that of their partners included:

- Succession planning
- Capital investments (e.g., buying property vs. renting)
- Renewed efforts around building cash reserves for nonprofits
- Long-term fiscal viability
- Mergers and acquisitions

Other Areas of Planning Interest

Survey participants highlighted two other areas — Arts and DEI — in their responses to planning questions that may influence planning efforts.

In looking at the Arts, one grantmaker posed the following question, “What can philanthropy do to support strategies around new delivery models and support structures for arts and cultural organizations?” Developing exciting, engaging delivery models for content in a socially-distanced world will be critical for that sector to rebound from months of shuttered theaters and galleries.

The impact on the creative economy as a driving economic force for the region was also pointed out. The 2020 [Otis Report on the Creative Economy](#)

reported that in Los Angeles County alone, the creative economy accounted for \$203 billion in economic output and \$67 billion in labor income. These well-paying jobs rely on a pipeline of talent that begins with support for arts education in our schools. As one participant put it, “Let’s start to invest in DEI, cultural spaces and in the creative workforce. So that (the) arts, like other industries, is truly sustainable.”

Regarding the importance of integrating DEI into planning, respondents expressed interest in understanding how grantmakers could impact the inequities that have always existed but have now been magnified by COVID-19 and other recent events.

“I think this pandemic has exacerbated communities and populations already most vulnerable and I think that will be an integral part of our planning processes for the future. We already focus on underserved, vulnerable communities, but having better understanding of how they are impacted will hopefully inform our conversations and decision-making.”

This survey, like most, was a snapshot in time. Most of the responses came in just as protests across the country and in Southern California began to take place. Just as DEI training is becoming important for foundations, integrating DEI-informed practices in grantmaking will prove to be important in addressing inequities. Foundations and philanthropists must consider how to thoughtfully incorporate these practices into the giving process, and integrating them into strategic planning is an important step.

Just as DEI training is becoming important for foundations, integrating DEI-informed practices in grantmaking will prove to be important in addressing inequities.

THE INDIVIDUAL DONOR SECTOR

Among the needs indicated by individual donors, wealth managers and advisors, and DAF holders were the following:

Learning Needs

Learning about various COVID-19-response models was most important to donors and advisors. Research scored slightly higher among individual donors. The least important was learning about general grantmaking processes and strategies. Advocacy tied for last among the individual donor/DAF holder group, while it was a close second among wealth managers and advisors.

Training Areas

- Lessons of the Great Recession
- Multi-year funding for community-based organizations
- Trust-based philanthropy models, including multi-year, unrestricted funding

Research Topics

- Strategies and roles to help facilitate and accelerate inclusive and equitable recovery
- The impacts on small businesses
- The effects of unemployment and furloughs
- Developing a deeper understanding and creating connection to issues through DEI
- The role of advocacy for individual donors and its potential impact

A deeper look at the needs of [INDIVIDUAL DONOR SECTOR](#).

THE POWER TO CONVENE

AMONG THE MANY TOOLS that grantmakers have to help nonprofits is their power to convene. The Center for Effective Philanthropy describes convening as one of philanthropy's *Superpowers*.²⁰ "Convening creates connections, sometimes in new or unexpected ways, when participants are focused on a specific topic or goal. It also provides opportunities to meet others in unplanned ways, and often those unintended connections add greater value than many of our planned one-on-one meetings."

Responses to this question were numerous and it was encouraging that many answers already showed that funders are giving serious thought to how to use their convening power. They understand how important bringing people together can be in moving dialogues forward, and they are open to learning how to do it under difficult circumstances. Many foundations already convene grantees to help understand community needs and to share information about their own outreach. Other foundations use their power of convening to provide technical assistance for nonprofits by bringing in skilled consultants.

Philanthropy can bring thought leaders together with nonprofits in a way that those community partners may not be able to do alone. The survey responses demonstrate the desire and need for philanthropy to be important learning partners with their grantees and convening is an ideal tool to accomplish this. Even under trying circumstances, a wide range of support and technical assistance could be offered through convening. However, COVID-19 has greatly impacted the way philanthropy can exercise this superpower.

One participant astutely pointed out that, "With so much uncertainty, convening will need to happen much more deliberately and conscientiously, not necessarily just calling a bunch of people. With time, energy and attention being split in numerous directions, the value-added for a convening will need to be that much more apparent and also specific to the individual." Undaunted by challenges, many in philanthropy are looking to find emerging best practices for convening.

As mentioned in the section on *Planning*, with in-person convenings not likely to happen, virtual meetings seem to be the logical choice. Yet, the ongoing challenge is the quality and inconsistency

of available technology for both the convener and those attending. Also, what works well for designing in-person sessions will not translate well into virtual sessions. To effectively convene virtually will require shifts in design components. To convene well, investments will need to be made.

Some funders seemed genuinely excited about the possibilities these shifts can provide. One such funder shared, "Wow! This is an exciting question. I'd like to leverage my power to convene in new ways. At first, while home under shelter-in-place orders, I thought that planning via online and video platforms would be a terrible idea, as everyone's plans would be created with so much fear of the unknown. But as I have watched so many organizations and individuals adopt new ways of working and grow quite comfortable with working from home and using video conferencing, I think convening can be quite exciting moving forward. There is so much room for innovation and re-thinking the various fields we work in. I hope that I can help with such an effort. I could benefit from some training about facilitating online convenings as well as by gaining some more wisdom about organizational planning in times of great uncertainty (such as case studies about post-9/11 and post-2008/2009 financial crisis)."

"Leveraging social media (Instagram or Facebook Live), documentaries, or TED Talk-type of events could be new ways to convene people."

Others shared that they are able to convene more people in a virtual format. Without having to cope with commuting, traffic, parking, and other associated costs, sometimes more people are able to participate.

Just as important as formal convenings are informal gatherings. One respondent pointed out that convening does not necessarily need to be formalized or structured and that sometimes these networking or socializing opportunities can be more valuable. "Certainly, I think it would be helpful to engage

virtually in ways outside of Zoom and virtual meetings. Leveraging social media (Instagram or Facebook Live), documentaries, or TED Talk-type of events could be new ways to convene people. Funding would be needed, and communication experts to help design content, format, etc.”

For the power of convening to be successful in this time, based on what leaders and staff have shared, foundations need training around the following:

- Information on technology platforms, hardware/software needs, security, and connectivity
- Training on how to present in a virtual space
- Trained facilitators comfortable with the new and emerging technology
- Connections to funders and organizations who can partner on convenings for specific issues
- Peer-to-peer learning of best and emerging practices for virtual convening
- Funding and support to invest in technology

As with many of the challenges that the crisis has presented, grantmakers are finding new ways to carry out their missions. However, many funders questioned how they will integrate all the new things they are learning into how they operate into a post-COVID-19 world. How will all the positives become the new normal and what will philanthropy’s role be in making that happen?

This report is intended to give those in the field an opportunity to reflect on the needs of their organizations as they focus on meeting the needs of their grantees.

NEXT STEPS

The immense challenges that our communities and community partners face right now — and in the months and perhaps years to come — will require grantmaking partners who are knowledgeable, flexible, able to respond quickly to evolving environments, and armed with an array of tools and options to provide assistance. The survey set out to look at the needs grantmakers have within the context of these larger responsibilities, highlighted by the current COVID-19 crisis. This report is intended to give those in the field an opportunity to reflect on the needs of their organizations as they focus on meeting the needs of their grantees.

The survey and report are intended to be a jumping off point for deeper discussions. With more than one hundred respondents, we believe that there is enough information provided to identify focus areas for reflection, conversation, planning, and action. A few highlights we at CWC would like to suggest include:

Supporting Grantees

Nonprofits quickly responded to COVID-19 by adjusting their practices and service-delivery models. They are now exploring the efficacy of these new models and considering keeping many new practices in a post-COVID-19 world. Grantmakers could do the same by institutionalizing some of the shifts made to accommodate this most recent crisis. What changes to your grantmaking might you institutionalize into your ongoing practices? What might the grantmaking sector need to change moving forward? How can your grantmaking be more impactful by institutionalizing some, or all of, the following changes you have already considered or have made:

- Increasing GOS as a common practice
- Rethinking grant terms to be more flexible beyond the standard 12-month period
- Integrating more multi-year grants
- Streamlining and/or shortening the application and reporting processes to lessen the burden of work on nonprofits

Supporting Technical Assistance

While organizations of all sizes can benefit from technical assistance support, small and mid-sized organizations are the ones that are most vulnerable, particularly those serving Queer and BIPOC

communities. We encourage grantmakers to look deeply at what assistance can be provided, both now and into the future, that strengthens grantee's abilities. We know from the survey results that funding and support is not matching technical assistance requests in certain areas. Consider how you can be responsive to what grantees self-identify as needed, especially in regards to enhancing financial sustainability:

- Expand investments in fund development and building staff capacity in this area
- Fund strategic planning that combines vision with plans that use shorter time horizons and include scenario and contingency planning. This can be costly and funding it will be important moving into the future
- Virtual engagement is here to stay even after our society reopens. Support technical and production needs for quality virtual program delivery and administrative work

Supporting You and Your Staff

The pandemic has ushered in changes in the way institutions work internally. Our survey showed that there are several key areas where it will be important for grantmakers to invest in their own staff, practices and procedures for more effective, responsive, and impactful grantmaking in the future:

DEI — DEI was rated high by both leadership and staff even though this survey took place before Black Lives Matter protests began. True DEI requires more than just a training. DEI training in absence of ongoing assessment, coaching, and investments does not lead to the changes required for a more equitable and inclusive workplace and society. Just as important to DEI work regarding HR practices is how DEI applies to your external facing work. For instance, reviewing granting processes and procedures — from questions asked by funders to review processes used — will help to move institutionalized practices to align with equity principles in grantmaking.

Coaching — Considering how high coaching ranked for both leadership and staff, it is clearly a direction for grantmakers to look for professional development. This is a tool that can help build organizational capacity to do better work; increase the “bench strength” of staff; and can help employee retention and morale. Not all coaching is equal. Finding models that fit your specific needs and organizational culture will be important to coaching success.

COVID-19 Response Models — While this study highlighted the needs that grantmaking staff have for understanding COVID-19 response models, we believe the need is broader than this current crisis. As nonprofits work towards being better prepared for managing through emergencies in general, so must grantmakers and philanthropists. We suggest, as you look at COVID-19 response models, also consider:

- Reviewing philanthropic responses to past crisis moments to identify actions and investments that were most effective and could be emerging best practices for philanthropic crisis response
- Responding immediately and effectively to future emergencies will require broader scenario and contingency planning to be integrated into strategic planning. Communication plans, preplanned funding adjustments, and alternative forms of support, when planned ahead, can be deployed more quickly and efficiently in emergencies
- Given the unique role that government plays in emergency response and how philanthropy can enhance and support that response, building relationships in advance with government agencies before emergencies occur lays the groundwork for immediate partnership when needed

Mental Health — Stress is one of the leading factors when it comes to employee burnout. Supporting the mental health of you and your team is vitally important as the survey bore out. To help further mitigate employee stressors, consider:

- Hire temporary staff or contract support to help manage increased grant review and request workloads
- Invest in technology that allows staff to work effectively from home
- Have well-thought out strategic plans that include contingency planning in place before emergencies happen
- Invest in good, professional human resources, either as staff or as contract support

Supporting New Ways of Convening and Creating Community

How do you create space for conversations, education, and community building when you cannot be together in person? The positive impact of thoughtful convening does not have to stop because you cannot

meet. And while face-to-face gatherings will remain an important strategy, the future of convening may always include a mix of in-person interactions and virtual sessions. From the feedback, it is evident that rethinking how, when, and for what purpose convenings occur will be important. When grantees are managing their own increased workload, how can convenings support them rather than burden them? What purpose do convenings need to serve, and how do you design gatherings so that they have the desired positive impact? Professional facilitation and production support can help you increase the effectiveness and productivity of convenings, virtual or otherwise.

Our hope at CWC is that the report serves as a guide to a deeper conversation about grantmakers' capacity to weather — and respond — in difficult times.

CALL TO REFLECTION

As you come to the close of this report, ask yourself: What has surprised you the most from the report? What hadn't you considered about your work that might change as a result of the information shared by your staff and peers found in this report? How can you better equip your nonprofit partners and yourselves for success?

Our hope at CWC is that the report serves as a guide to a deeper conversation about grantmakers' capacity to weather — and respond — in difficult times. Let this report spark discussions between grantees and program officers; between foundation leaders and program staff; and among philanthropic entities.

If you would like to be supported in these conversations, or have questions about CWC and the work we do in the sector, we welcome a conversation and the opportunity to support you.



For over 15 years, Community Works Consulting Inc. has helped nonprofits and foundations create long-term sustainable change. We are a team of passionate nonprofit and philanthropy advocates who can offer creative, collaborative approaches to meet your needs.

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