



## **Demystifying Trust-Based Philanthropy Session Four: What Does Grantee Accountability Look Like in Trust-based Philanthropy?**

### **Full Transcript**

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>> CHANTIAS FORD: All right. Hello hello hello everybody! Hopefully that gave you all a chance to breathe a little bit and relax and slowly transition into this session. I know a few of us have had a hectic day, summer, whatever. So hopefully that gave you a chance to get a little bit of calm in.

Welcome to everybody and I'm going to pause for recording. Welcome, welcome, welcome, everybody. We're so happy to have you all here with us. My name is Chantias Ford, I'm the director of programs at the trust-based philanthropy project. As a visual descriptor I am a Black woman sitting in front of a white wall with some artwork and diplomas and plants, I have shoulder length hair and my red lucky lip and I'm so glad to have you all here with us.

I greet you from Leni Lenape native land currently known as Philadelphia, Pennsylvania for our land acknowledgment. And we are here for our session on demystifying trust-based philanthropy, what does grantee accountability looked like in

trust-based philanthropy. I'm so excited to have you all here with us today. Thank you for being here.

We ask that you keep your microphones muted. Please use the chat box for questions, comments, dialogue, engage with each other. We all have different levels of expertise and experience, so we love to hear from you all as well. Please assure you're using the most recent version of Zoom for all of the different capabilities.

We will be using CART transcription. Live transcription is available for this event. To enable live captioning please navigate to the meetings control toolbar and click the "show captions" icon.

The session will be recorded for future reference, both in a follow-up email we'll send it out and it will also be available on our website.

And of course join us on social media. You can use the hashtag #demystifyingTBP. Feel free to add your thoughts, reflexes and things your learning from this series and from this session. I have to give a shout out to the amazing staff. They're all here.

This is a full team effort so deep gratitude for the entire team for the support and work to make this happen.

To get to the series outline. Maybe some of you this is your first session. Maybe you've been at all of them so far. We're excited to have you either way. This session will be talking about grantee accountability and what that looks like in trust-based philanthropy and we'll have our final two sessions after this for the series anyway.

We'll be talking about evaluation learning impact, all of that good stuff in our next session in July. July 12th. And then finally we'll end this series with racial equity. Talking about the correlation between racial equity and trust-based philanthropy. And that will be on August 2nd. Please join us for those sessions.

And if you missed any of the previous ones, the recordings are available on our website. You can feel free to check those out.

So for today's agenda we're starting with the opening which we're doing right now. We'll have a little bit of grounding context to answer the question and give a little bit of base-level knowledge. Then we'll have an amazing panel discussion, we're really

excited to hear from these speakers we have, and then we'll have breakout conversation.

And speaking of the breakouts, we would like to thank our amazing philanthropy serving organization partners. They've been partnering with us for this series. Feel free to take a look if you're not involved or engaged with any of them, maybe see one that's in your region or area that you're in, in your grant-making, the type of grantmaking you're doing,

Feel free to reach out with them, to connect with them, feel free to join their breakouts at the end of this session where they'll be reflecting on what we've learned and hearing more discussion together.

So to jump in just a little bit of a base level on what trust-based philanthropy is, we acknowledge and understand people are coming from different levels in their trust-based journey. So this is just a merely a reminder or refresher. But trust-based philanthropy is a values-based approach that really gets at the power imbalance that we see in the philanthropic sector. We see this power imbalance between funders and grant-seekers where funders hold quite a bit of the power and this approach, trust-based philanthropy really seeks to right-size that power and balance and to make it more of a mutually beneficial relationship and a mutually beneficial partnership. And it's centered on that belief that funders do play a critical role in redistributing the resources and the power, to really support those grantees and the communities that are doing the meaningful work on the ground.

And so it really flips the script and really aims to shift conventional philanthropy, by prioritizing relationships and mutual learning, over those transactions and compliance, and the top-down accountability that we usually see in the sector.

So there are six grantmaking practices that are core to a trust-based approach. With of course not one-size-fits-all in this approach, and this isn't necessarily a checklist for funders to collect, but these are some practices that trust-based funders should be implementing and operating in.

First one being multi-year unrestricted funding, which is a really important practice to support your grantee partners, to support nonprofits, by acknowledging that the work is

long-term, by acknowledging that you trust them enough to know that they know where to put the moneys as it's needed.

And so that's multiyear unrestricted funding.

Doing the homework, this practice really gets at funders taking on that onus of responsibility to research their nonprofit partners, to research the impact areas that they're seeking to support, and to do the homework. To get to know those organizations proactively rather than having the grantees seek out the funders.

Simplifying and streamlining paperwork gets at the idea there's a lot of paperwork requirements, both in the application and the reporting. The funders are requiring of nonprofit organizations that a lot of information that's not being utilized, not being used to make decisions or to do anything, funders are sitting on a lot of information. So it encourages funders to simplify a lot of the requirements that they're requiring of nonprofit organizations, to prep their time and energy and focus. To do the meaningful work that they should be doing.

Being transparent and responsive really gets at having those open lines of communication with your grantee partners, being transparent in the ways that you operate as a funder. And being responsive. Oftentimes grantseekers will go weeks, months, however long without hearing anything from their funders or from prospective funders, so this really just gets at building those strong relationships by being transparent and responsive.

Soliciting and acting on feedback is a big one. Because oftentimes we as funders will soon things about grantees -- assume things about grantees without knowing. But having the opportunity to collect and act on the feedback shows that you're building strong relationships with your grantees. And gives you the opportunity to hear their perspective, and to understand their pain points and their issues, and making sure that's not being tied to any funding sources. And finally support beyond the check is a really important practice. Funding should recognize opportunities to support beyond just writing the check by different things such as technical assistance, capacity building, connecting grantees with other funders or with other grantees. There are so many different ways to really build relationships and support your nonprofit organizations

beyond just writing a check. So these are all just practices that help to make a funder more trust-based and to build those strong relationships.

And while trust-based philanthropy may look different for different organizations based on the practices, there is a one common denominator, shared values. These are the values that embrace the trust-based philanthropy and the practice. These are the core values working for systemic equity, which is understanding and recognizing that our society and our sector are inequitable. And that philanthropy and the funders we can play a key role in addressing some of that inequity.

Redistributing power, as I already mentioned. Understanding those harms and limitations of decision-making power being held in the hands of a few.

Centering relationships. Understanding and prioritizing how important relationships are. And partnering in the spirit of service. Seeing philanthropies role as a partner and a supporter, rather than enforcing that compliance and control. And then embracing learning. Which is really about acknowledging that we don't have all the answers, and that we can use this as an opportunity to collaboratively learn.

And of course I want to lift up that mutual accountability that we'll be talking about quite a bit today. As a core value of trust-based philanthropy, because it's important for us to understand that we have to be accountable to one another. Funders to grantees and vice versa. So we'll be spending quite a bit of time talking about that so I won't touch on that too much right now.

So that's just a little bit of an introduction to who TBP is, what TBP is, and I want to do our opening poll. Maybe you're very confident and you can answer this question in great detail. Of course we know there is nuance to this question. So maybe you're somewhat confident and you have an idea and can give a few talking points on it, or maybe you have no idea. Maybe you're completely new to trust-based philanthropy and you're here to learn.

I'll take a few seconds while people are completing the poll. We have a pretty good bell curve. We have 4% that are very confident, about 66% that are somewhat confident, and about 30% that are not confident at all. We're excited to have you all

and hope you all can learn something from this session to be more confident in the ways you answer this question.

And I'll jump into the grounding context. What does grantee accountability look like in trust-based philanthropy?

And just as a reminder, we have tailored these session titles around common questions and misperceptions that we get around trust-based philanthropy. And this is one of the questions we get. What does grantee accountability look like? You're asking us to throw everything out and just willy nilly just fund the people and how can I hold my grantees accountable?

We get that's the gist of what funders are asking when they hear about trust-based philanthropy, when they're grappling with how to operationalize it. And I encourage you all to take a moment and think about a relationship with a co-worker that you enjoy. Maybe somebody you have a good working relationship with, you all can collaborate and connect on things.

How do you know they're going to do what they say they're going to do? Take a second and reflect on that. Reflect on what accountability looks like interpersonally in some of your relationships, in some of the ways you work.

While you're reflecting on that, I encourage you to reflect on reflect on the relationship you have or funders have with their grantees, and the ways that you built these relationships with your colleagues, and you see how they work, you see how they operate, and that's how you start to gain that accountability to them, how they gain accountability to you, how you can build that mutual partnership. And that's exactly what we're asking for or what we're encouraging with trust-based philanthropy as well is building that mutual relationship of accountability.

So what does trust-based philanthropy look like? There should be accountability in a trust-based funder-grantee relationship. We are not advocating for you to throw it all out and not care what anybody does and just give the money away. Of course it is important to give the money away, but there should be a level of accountability for any type of relationship you engage with.

And any strong, healthy relationship, there is going to be accountability. And it should be mutual rather than this top-down approach. We've talked about those power

imbalances. So it's important to consider the power dynamics that are already at play, and how to really right-size that. How to really acknowledge that there shouldn't be this funder holding all of this power and the grantee just at the funder's whim. It's also important for you to consider your accountability as a funder to the grantee. And to the communities that they serve. And we're going to hear from this from the panelists. They have some really great insights on that so I'm not going to dig too much into that. Trust-based philanthropy does call for accountability but it calls for it to be mutual but it calls for all parties in the beneficial relationship.

Why should accountability be mutual? Mutual accountability helps to right-size that power imbalance between funders and grant seekers. It really seeks to acknowledge the mutually beneficial relationship. Of course grant-seekers need funders to do their work, of course. But funders need grantees to help them produce the impact they want to see in the world and to get the money out the door and partner in the spirit of service with other grantees.

So it is a mutual but beneficial relationship. Both parties come into the relationship seeking something and knowing that each other can provide what they need. So it's important to consider that rather than the conventional way that we kind of have approached your philanthropy and approached grantseeking where it seems the grantee is the only one that needs something out of this relationship.

Is it helps them to consider their needs and the things that they need to operate and how funders can show up in a mutually supportive way. And it helps to -- affects nonprofit leaders of color, marginalized communities and populations. And if you as a funder enter each grantee relationship with a spirit of mutual respect and accountability, and not just with the organizations and the leaders that you have bias towards, because we all have bias, it really helps to reduce that bias and to treat your partners with the respect and accountability from you that they deserve. We'll get more into this equity bias conversation in our final session, but as a note, mutual accountability helps funders operate more equitably.

So as a funder there are various ways you should be accountable to your grantee partners when we talk about mutual accountability. I know we think a lot about the ways nonprofits should be accountable to us as a funder, but that mutual accountability

really means considering how you should be accountable to your grantees. And of course one huge way you should be accountable to your grantees is by living and practicing your values. If you say you have certain values, it's on your website, it's on all of your information, and the actions that you take are misaligned with those values, you're not holding yourselves accountable. And what great way to know if you actually are aligned is by asking your grantees. Again the panelists will get more into how these different practices are interconnected and aligned.

But you're already starting to see some of those lines hopefully. So yeah. Examining what your values are and examining how you're living them, if you're living them, if you're operating in them, is a great way to hold yourselves accountable not just for yourselves but for your grantees and for that relationship.

Of course maintaining clear and open communication is going to be key. Having those lines of communication open where you can express what your priorities are, what your strategies are, how you operate, all of those different things. You're accountable to your grantees because you're taking them on this journey, on this partnership with you, and you want to be clear about what the partnership looks like. Just like any healthy relationship. Maintaining transparent and responsive partnership is another great -- is another important way that funders should be accountable to their grantees. It is a partnership. And in any healthy partnership you have to be transparent. You have to be open about what your priorities are, about how you're operating if you're going to have a shift. Think about it from a nonprofit perspective when a funder goes through some sort of shift, whatever that may look like, and how jarring that can be. You have to have that accountability to your grantees, to take them along on that journey and a healthy partnership with transparent and responsive actions that you take a funder.

And being reliable and operating with integrity. Part of integrity is doing what you say you're going to do. And not doing what you say you're not going to do. So that's another way funders have accountability to their grantee partners is by being operating with integrity and being reliable about the things you say you're going to do and the things you say you're not going to do.



Just a note. Shifting to a more trust-based approach will not reduce accountability. Oftentimes these parameters we put in place, these way we operate, and conventional philanthropy such as the long applications with various questions and the project-specific grants, and lengthy written reports.

All of these things we do don't explicitly reduce accountability. Or they don't -- they're not helpful accountability guides. Often times we're doing all of these things we say okay, if I have the application, if I have all this information, I can hold these grantees accountability and I can get all this information, and they're not held to accountability guardrails.

They stifle, they don't necessarily support the grantees. Making grantees jump through hoops is only going to put the priority on compliance, and regulation rather on relationship, impact and support.

So that age-old question we get, how do we know that grantees will do what they say they will do? One, do the homework. Do the homework on your grantees, on your potential grantees. Get to know who they are, what they do, what their work looks like, what their impact is. Build those relationships. Build those strong powerful relationships where they can feel comfortable actually telling you the truth, actually being transparent, actually being open with you.

A big one that a lot of funders don't think, just think about their work. Subscribe to their newsletter, check out their Linked In stay subscribed to all of their information. Go to their events. Actually follow their work. You don't have to have them do a report if you're at the event to see it yourself. So make sure you're doing that.

And then support them. Support beyond the check. Giving them technical assistance. Giving them advice. Partnering with them, connecting them with other funders. There are so many different ways to support them. And if you don't know, ask them.

And finally trust them. If you've entered into partnership with them, trust them. You'll hear more about all of how to do this and the ways it's been done from our amazing panelists who I'm so excited to pass the baton off to.

We have Lorrie Fair Allen who is the chief program director at the Charlize Theron Africa outreach project. We have Dr. Meredith Shockley-Smith and we have Jill Miller. And this conversation will be moderated by our amazing fear less leader Shaady Salehi. And I will pass it over to you, Shaady.

>> SHAADY: Thank you so much, Chantias, for that amazing introduction and grounding and setting us up so well for the discussion.

And I'm delighted to introduce our panelists. Welcome to Jill Miller, president and CEO of Bethesda INC and BI3. Lorrie Fair Allen, and Dr. Meredith Shockley-Smith executive director of contracted will Cincinnati and founder of Queens village. Welcome to our fabulous panelists. I'm Shaady Salehi, I'm the executive director of the trust-based philanthropy project joining us from Olone land also known as San Francisco.

I'm an Iranian woman with pale olive skin and long brown hair and mock turtle neck and hoop earrings and a blurred background.

So let's get into it. Because I think Chantias set us well with grounding context. Mutuality and you all are here to give us stories and context of what this looks like in practice.

So I want to first off just start by inviting all of you to share a little about who you are in your organizations and we'll start with you, Lorrie, and then Jill, since you represent kind of the grantmaker perspectives on our panel. Can you share both -- Lorrie can you share a little about your organization? The focus and size of your grant-making and where is your organization currently on the trust-based philanthropy journey?

>> Lorrie Fair Allen: Thanks for having me. I am calling from traditional Tongva land in Long Beach, California and I am half -- I'm Hapa I'm half Asian and half white. I have olive skin. I'm wearing a black change-maker shirt with a bedroom background. And a beige sweater.

So at the Charlize Theron outreach project, we focus on community based organizations in southern Africa, mostly is from South Africa because that's where our founder is from. And we support the health education and safety of young people in South Africa. Mostly focusing on community-based organizations that serve youth.

And they'll always have either and/or focus on sexual reproductive health and/or gender-based violence.

The size of our grants is anywhere between \$20,000 and \$100,000 per year. And we give multiyear unrestricted grants. We also support them with capacity building grants. There's a travel grant, and also a whole host of accompaniment that includes summits, where we bring our partners together for kind of a -- we hold space for them to dream, co-conspire, not traditional ways of like where we leave them with a laundry list of things to do, but rather provide the space for them to cocreate and rejuvenate. And we also host virtual sessions for them and will do random things like read proposals that they want to write, we'll be a sounding board, maybe they need a critical friend. We're trying to just respond to them in the best way possible. And we also have a scholarship program on the side, but that's our only single program that we run in-house.

>> SHAADY: Thank you --

>> Lorrie: Oh, where we are on our trust-based philanthropy journey. I don't know -- well, we're in it. I would say that we're probably somewhere deep in it, but not quite to the far end of it where we really feel comfortable saying that we're fully trust-based and have all equitable practices and participation.

>> SHAADY: Thank you. Just a reminder that trust-based philanthropy is a journey, it's an ongoing practice. It requires constant iteration. So many of us are in the middle of that journey so thank you for sharing that, all of that Lorrie.

Jill, moving on next to you, can you introduce us a little bit to your work at Bethesda Inc and Bi3 and the context of your grant making overall?

>> Jill Miller: Hi, everyone. I am Jill as Shaady pointed out I have a white background, a Joey Votto, I am in Cincinnati, Ohio, a Joey Votto signed jersey, go Cincinnati, although the Reds aren't great this year. I have a black shirt on and blonde hair.

Excited to be with you today and I have the privilege of leading BI3 which is a grant initiative to transform health. So we are focused on health. Our key priority areas are maternity and infant health, which we've been in that space for over a decade now building relationships in.

The youth mental health space and working with our strategic partner Tri-health which is an integrated healthcare delivery system in Cincinnati. So it's really great to be able to leverage our partnership with Tri-Health to readily try new things, pilot new approaches to help in healthcare including the social determinants of health.

But our purpose is to lead the way to a day when everyone every person has a fair and just opportunity to achieve their best health. When race, ethnicity and zip code are no longer predict how long someone will live. So that is really where we're leading. And our trust-based philanthropy approach, we've been practicing trust-based philanthropy even before we knew it was a thing, since about 2016.

As Shaady said it's very much a journey. So we're deep in the journey, but I would say a work in progress as well, still learning every day. We really consider ourselves a learning organization, which really allows us to practice trust-based philanthropy. So excited to be with you, and to talk with all of you.

>> SHAADY: Thank you, Jill.

And Dr. Meredith Shockley-Smith. What does trust-based philanthropy mean to you? You're muted?

>> Meredith: I'm quick introduction. I'm Meredith in the books I have collections, books, plants, places I've traveled. I am wearing a black shirt and I always wear beads by the Maasai. Did I get everything on the intro. I'm on the stolen land of the hope well, the Miami, and I think that's the entire intro. Wonderful.

In addition the two questions that you asked me, one was what does it to be an executive director and also a founder and what does it mean to be connected to trust-based philanthropy. So I will say that I started off my journey coming to the Cincinnati work to tackle racism.

So looking at antiracism and its impact on infant mortality. And the acceptance and the executive director role where funding became my full conversation. But in truth I started a conversation around funding early on, because I was asking for things people kind of asked for prior. So I wanted all Black spaces where Black women were welcome. So I had to go into thankfully trust-based philanthropy was a thing, and that Jill and BI3 were leaders in that work.

So I was able to go in easily and say I'm going to need hold spaces for Black women to create interventions and we are going to hear about what those are after you give me the money and do those things and I can't really tell you what they are. And having someone say okay, let's do it.

So the truth of the matter is this work would not exist if trust-based philanthropy did not exist. Coming from a world of nonprofit, you know, people tell you what to do and you do it, because that's how money works.

So I really needed it to be different to create this kind of change

>> SHAADY: Thank you. That is such a great segue for us to really talk about this question around accountability. Because what you described Meredith is -- as you've said, is not the norm. That you can apply for fund can without knowing exactly what's going to happen, but that you have the trust and support of a funder that saw the power and potential of that.

So there's this misperception that comes up a lot. When we talk about trust-based philanthropy, when we write about it, when people ask questions. That when in a trust-based context, because it's unrestricted funding, because it's stream lined paperwork. Maybe there's really limited reporting. Maybe really limited proposal writing. There's this question that comes up around well, ooh, that feels uncomfortable.

Doesn't that mean that you're going to get less accountability from nonprofits if you don't have as much strings attached? And I think Chantias already demystified that for us in the introduction. But I would love to hear all of you reflect on this. And we'll start with you, Lorrie. When you hear that question, what comes to mind, really, for you?

And how do you approach this notion of accountability at the Charlize Theron Africa Outreach Project?

>> Lorrie: The first thing that comes to mind is how would they be accountable if we weren't here? They would be accountable because they are community-based organizations so they are accountable to their communities. So I don't necessarily feel like we're looking at accountability the right way. So if we define it, if you're defining it in terms of control and compliance, that looks a whole lot different than what it looks like to be accountable to the people you serve. So the way we look at it like we don't have to do much work on that type of accountability, because they were there before

we got there. They will be there long before -- long after we leave. They've been working on these things for a long time, whether they had funding or not. And we are here to join the journey and to try to help them be the best organization they can to serve their community. So I would say the accountability needs to be flipped in terms of like they will be accountable to their community. And if they don't do a good job serving their community, then they won't exist. Because the community, the trust with the community will erode. I have a really good example of that as well if you want to hear it.

So I lived in South Africa about 13 years ago, and they were doing a big project that was a community project to try to build more cohesive -- it was a really spread-out community and we were building places of gathering centered at high schools, secondary schools, so that these HIV counseling and testing services that served the schools primarily could be expanded to the community.

And so they picked four high schools to build soccer fields, a laundry facility, a community garden, a clean water source and a couple of other things. And in the budget was this fencing that goes around the school. And the to the dollar dropped so the budget had to be cut kind of a lot.

So the executive director of the organization. I was there to manage the relationship between the community and the organization and helping make the project like hand-overable to the community at the end. And the executive director said no problem, we'll just cut out of fencing and I had to kind of say no, you can't do that. Because the community will then think that the principals of each school ate the money, that they stole the money.

Because the fencing was really, really important to the community.

And so we kind of had a little bit of tension around that. And I ended up prevailing, thank goodness, and found another solution of where to cut the budget. But if they hadn't done that, and his not understanding the community needs and really listening and asking the principals of these high schools, who in charge of these facilities to share with the community were saying the community fences were really important.

And that would have been disastrous for the principals who have to live and work in those spaces in the community. So that's one example of just like listening to the

community and making sure like that is accountability to them. And if that trust is eroded, then that organization won't exist anymore. So for us accountability really has to be flipped -- they will have their accountability and we don't have to worry about that.

Our job is to be curious, ask questions, ask about what they're learning, how can we help. And for us accountability is more how well are we serving the program partners. So we actually kind of flip it on its head.

We have yet to -- I know people do the center for affected philanthropy has the granted perception report that they do, and that's wonderful. I think for us who are a really small but mighty team, it's not within our budget to do. So we will do our own grantee perception surveys. We will also seek whenever we can, whether it's an anonymous survey or in person, and continue to seek feedback in ways we can be better, things we're not getting right and that served us pretty well so far but we're always looking to get better

SHAADY: Thank you, Lorrie. You're really reinforcing the most important thing to be looking for is making sure the organizations are ultimately accountable to the community that they serve. I know this is also something at BI3 and Cradle Cincinnati that you have censored the way you think about this work.

Jill, what else would you build upon? I know you think about this mutual accountability much like what Lorrie described. How do you approach it at BI3 and going a little deeper, how do you reinforce a sense of mutual accountability in your partnerships?

>> Jill: So what I would build on, and I didn't mention this when I was introducing myself. But BI3's grantmaking budget is about \$15 million a year. So we will give large multiyear, multimillion dollar grants. So with that, the way we approach the work is that we build in funding within the overall project grant for flexible dollars.

Kind of that unrestricted bucket of the overall budget. And then we sit down with our grantees and kind of create the road map together. Here's where we would like to be today, here's where we would like to be in three years. Key objectives that we want to try to -- is there a community metric that's already being measured that we as funder and grantee want to keep our eye on.

So with our focus on reducing infant mortality, Hamilton County continually tracks its infant mortality rate. So that was already out there. Nobody had to calculate it. Cradle Cincinnati nor Bi3 had to collect the data. That's something our community was already tracking. So with all of our work, with that north star of reducing infant mortality, that was a metric we wanted to keep our eye on.

We talked with our grantees too, are there any other outcomes or outputs that will be beneficial for you to track along this way. And we're not going to hold your feet to the fire and say if you don't achieve ABC we're going to pull your funding. It's more a conversation what's going to be helpful to you the grantee.

And then we can shift and adopt and flex as we go, right? Success is not a straight line and as you get into the work, sometimes you hit barriers you didn't see at the beginning of the work.

You see opportunities you didn't see. And so it's always being adaptive and flexible and that trust and mutual accountability and listening to each other in this learning mindset. So Bi3 looks at impact through a more expansive lens. It's not just like we achieved X or Y. It's really about what have we learned.

And as I brought my board along this journey, that's actually what they are most interested in is what have we learned along the way and have we adapted to those changes. Nelson Mandela said you never fail, you win or you learn. And that really is how we do the work at Bi3.

>> SHAADY: Thank you so much. I know there were many questions that people had when they signed up for this just around like the impact measures piece and what you're reinforcing is that in collectively defining the community metrics with partners, one, that deepens trust and the sense of investment from the community side that you're fully invested in their goals and that can help reinforce accountability.

And I love that you reinforced that notion of adaptability, working with existing data and not attributing individual grants to these big-picture systemic changes.

Meredith, as executive director of Cradle Cincinnati having been part of some of these conversations in cocreating or co-defining community metrics, what is it like for you even one, just being in this conversation about funder-grantee accountability? And



two, can you also speak to the difference between how is it different when you have a relationship with a trust-based funder versus a more conventional funder?

Does the relationship and accountability feel and look different?

>> Meredith: Absolutely. So we have federal dollars, state dollars, philanthropy from individual people. So I get the distinction. And so even the diversity philanthropy, the philanthropic dollars is also interesting. So what I'll say is there are dollars, government dollars, by the way I love the government and their dollars. Nonetheless they have like the 100-page document and you fill it out and they have all these benchmarks and data points, which takes untold dollars from our team to keep up with the reporting, number one. And that takes them off the ground, number two. And oftentimes the benchmarks and the data points are not moving us forward. So one of the goals with having the trust-based work is we create benchmarks that make sense for moving our goals forward.

We knew we had the infant mortality issue, one of the things that was driving it was extreme preterm birth. If we focused on that concept, we would be moving ourselves in that direction. The question is what do we need to do that. We asked the people what is that causing you this stress. What do you need to be different around that stress. Great example on flexibility is that before the pandemic game people were like my stresses were I'm overworked, I'm running around, five kids to the doctor, four kids to the grocery store. A year later is my issue is I have five kids and I need to be able to do math on second grade level, the sixth grade level, and work and try to stay alive.

So what it looks like in that sense was okay, I was going to help people figure out groceries now I'm going to help them figure out math. And some people were like can you write this 30-page document and explain to me exactly how you're going to shift this work and Jill was like get on it. Do whatever you need to do. Which just helped us serve people better, differently, the way they needed to be served.

The other piece is we're constantly learning so we're looking for best practices, nationally, globally. So when you learn something new you want to try it. So you want to be able to -- we have community advisory boards. In places where infant mortality is high in Cincinnati there are about 10 of them. We can go straight to people who are

being paid to think about intervention and assess intervention quickly. So people pitch all types of new ideas.

And I think that that is a beautiful thing on agility and flexibility in the trust-based philanthropy model.

>> SHAADY: That is so well-put. For nonprofits to be able to be responsible in their communities it requires this kind of responsibility and adaptable trust-based support. That was really well-put in making the case for these approaches.

I want to dig into this notion of kind of the mutual accountability or the ecosystem of accountability you're all speaking to. Ultimately for nonprofits to do their work well it needs to be responsive to the community, for funders to do their work well it needs to be accountable to the nonprofits. So there's this cyclical trust in the approach.

I want to come back to you Lorrie because we got a question about global funding, because you are based in the U.S. and funding in South Africa. So you're working on building relationships and accountability across cultures, across time zones, sometimes across languages. So thank you speak to how you approach that, how you're able to do that, given the kind of vast distance between you and your partners?

>> Lorrie: Yeah. I think so first of all we've always been even preevaluation of ourselves and really deep self-reflection about trust-based philanthropy and equitable practices, we had always been relationship forward. So we were practicing to be in relationship and to be in community with organizations that were thousands of miles away. We did take a lot of trips down there. There was only two of us working at the foundation at the time, myself and the executive director.

And it was hard. But we still kept humans at the center of it. And we learned a lot and we built a lot of trust. That said, we also eroded trust by the -- with the structures that we were just assuming that we would have to be a part of. The processes that we assumed that couldn't be questioned. All of these things that are burdensome reporting. How to get money took a lot of time. We issued one year grants at a time.

All of those things were eroding their ability to do the work in the community. But yet our relationships were very strong. We started with a good baseline, that's something that's really important.

I think it was our responsibility to go and look inside ourselves. And when we did, we found oh, my gosh, we could be doing this so much better. And I think everybody learned a lot from COVID because there was a lot of like flexible funding being thrown around. And it was like oh, my gosh. And all of the impact that it had on our community-based organizations that we were supporting were just like thank you so much for not abandoning us.

And I think the benchmark has been set so low that community-based organizations have been kind of battered by and like traumatized by the inequities in philanthropy that they were so grateful for something that we were like no, no, no, thank you for responding to your communities when everybody was dying around you and you're on lockdown. So part of that is really staying in touch. And when something happens we're the ones being pro active to reach out saying are you okay what can we do. Like being really proactive and transparent from the get-go of this is how we want to work with you. We've re ed and made a document that are kind of like we introduce to new partners and now we have a team in South Africa so it's a lot easier to get to program partners if they need us there.

The document, and I can actually share it. But it's the important things to know. It outlines our values and it also kind of takes the program partner through everything that we offer, and it makes sure that it's really like this is -- we are here to serve you. And that's something that I don't think a lot of people do.

So putting yourself out there and going here's how we want to serve you. Will ask us questions. Here are our core grants. This is what you need for reporting, which is like a check-in. We don't require you to write up this big thing. And then all of the grants, all of the ad hoc information that we give them in additional support, and then doing it.

And then asking the question can we do more. What other things are needed at this point. The other thing is like our program team down there, they do check-ins and they write up the -- they write up the reports themselves. So program partners. If they want to give us written reports that they've done for other funders, that's fine. But for us we really try and keep them at the center of it.

And speaking to your point about they have these metrics with the committee. And you know, funders then require things of program partners or grantee partners. And

the problem is when they're not aligned now the one in the center is that organization. And they have to meet the needs of two communities. One is their community, who they should be accountable to, and then this funder community that hasn't really aligned their goals to the goals of the community. So speaking to what Jill and Meredith are talking about it's one of the first things we also asked, what is most meaningful to you. We have shared goals because you're working with youth on these things. So we're going to the same place. The marathon finish is we see it, but we don't know the path.

They're taking their path based on where the community is taking them. Political things that happen in their community, all of these things that are messy, and nuanced. And our job is not to stand here and go you have to run by here and get the water. You have to -- but you can only get the water if you prove that you can do XY and Z. And we'll only give you water, we're not going to replace the shoes that you busted up. We have to run alongside them in the marathon do you need a cheering squad? If so we're here. Do you need shoes? If you need water, all the things. And if we can't find it, we're going to try to find somebody who can and do it for the long term. So we try to support the program partners for like 10 years.

>> SHAADY: I think you're speaking to -- that's such a beautiful articulation of this notion of partnering in a spirit of service which is one of the values we lift up when we talk about trust-based philanthropy just being in partnership and being human and being supportive will inherently foster a sense of mutual accountability because your partners see that you're invested in the work.

And I think the other thing that you're articulating is it can be built into your structures. So instead of a grant agreement or a contract that has all of these don't do this or if you don't send in your report by this time and if you don't do this, but rather approach it from a here's what we're here to do for you. Here are the values that we stand behind. It just sets an instantly different tone, and sets up like what Chantias was saying, it right-sizes the partner imbalances so partners know what to expect from you and feel safe knowing what they expect of you. And I think that is what we're talking about when we talk about mutual accountability. And in fact when there are more transactional barriers in place, as Meredith and Lorrie have shared, it limits the

ability to do the work, and forget about trying to report back and being totally accountable to the funder, you're just trying to figure out how to make enough time in the day to keep up with all the transactions and do the work in the community. So I think you're all reinforcing really important points.

I want to come back to you -- Meredith, please

>> Meredith: There is a question in the chat about any government people who are doing trust-based work. The answer is yes, it is doable from a government space, OEM, Ohio department of Medicaid changed the way dollars are spent and given in Cincinnati. Everyone who is getting dollars writes to a board. Those women determine how the money is spent. The shared power of that notion is real and it's doable from a state reality.

Ohio Department of Health, sees the best practice like a Queens village work and they give money. So I just wanted to answer that question the answer is absolutely >> SHAADY: Thank you. And as a born and raised Cincinnati native, I feel proud to know that work is happening in Ohio. Thanks for sharing that.

I wanted to hear from both you Jill and Meredith about the work of Queens Village. Because Meredith you are able to -- Jill you invested in Meredith's vision for Queens Village which is very responsive to the community. I see that as such a great example of that reciprocal ecosystem of accountability.

So Jill, could you first talk about your end of the story because I think Meredith kind of began to share the beginnings of that. How did you learn about it and how did you know you could -- what moved you and your team to say yes, we will invest in that even though we don't know what the outcome is going to be.

>> Jill: It all comes down to relationship. We approached every grant as we're entering into a relationship, not a transaction. And my team will tell you they will never go work for another foundation or entity that doesn't practice trust-based philanthropy. Because it brings a lot of joy for them and a lot of joy to our grantees to be in it together. We want to be in the trenches with our grantees. We want to know the barriers we're facing and the challenges or how do we work through it together, who could we connect them with. To answer your question, Shaady, it's building trust. And you build trust by mutually accountable to each other in the way that you show up, in

the way that you respond, in the way that you listen to one another. When we realized Hamilton county had one of the highest infant mortality rates in the country back in 2011, Bi3 wanted to do something about it. So we released a request for proposals and got proposals from Cincinnati Childrens, Cradle Cincinnati, other nonprofits and we said okay here is an issue a lot of people care about. Let's bring everybody together, all different sectors. Our health commissioner at the time really put the stake in the ground and said it is not okay babies are dying in our backyard.

So the community really rallied and Bi3 stepped up to provide seed funding to really delve into the problem. We all agreed the north star was reducing infant mortality and like Meredith said early on, what was the key trigger for that and it was extreme preterm birth. Babies being delivered before 28 weeks' gestation.

And so you know, that was a really important point because it drove focus around it. And we began by listening to moms and what we discovered is that some of our assumptions were wrong. That what they needed was not what we thought they needed. They weren't late for their prenatal appointments because they didn't care. They were late because they had to take two buses to get to their appointment with a baby on their hip.

Another mom was very stressed because her landlord would not fix the electrical issue in her home, so she lied awake at night worrying about the kid she did have and the baby on the way that they were living in an unsafe environment. And like Meredith said, all these stressful factors, all of these things that make it difficult for mom to really engage in her prenatal care, we needed to help moms figure this out.

We were very siloed from the Childrens Hospital to the hospital that delivered the babies. Our community was very siloed and it was bringing everybody together and bringing everybody together mom and baby and surrounding them with the supports they needed to have a healthy pregnancy and a healthy baby.

Early on Cradle was one of those partners. And like in any relationship, as you start to build trust with one another, once you have that trust, when Meredith says hey, I have this idea of bringing Black women together and engaging them in the problems that we're facing and asking them to help us create solutions to their own problems. I

don't know what it's going to look like, I don't know who it's going to entail, I'm not sure where we're going to go with it but we know we need it. And we were like let's do it.

Because we had built that trust. It all comes down to trust. Being able to say yes, we're in it with you, we trust you. Let's do it. And the worst case scenario is we learn from it and we build from there.

>> SHAADY: Meredith, how was that experience for you? What made you feel comfortable going to Jill with kind of that vision? What like -- what would you build upon based on what Jill said in terms of how you felt comfortable to come into that with a vision? Yeah how was it for you?

>> Meredith: In full transparency, I was a professor for most of my life in Black studies and women's studies. So the fear that people come into these conversations with, I just didn't have. I was like I have a great idea. Just ask for what you need and believe it's going to happen. The people need it and you're about saving the people so here we go. That's the full transparency of it.

I'll also say I stepped into a role where the stage was already set. It was a white male led organization, very well respected white men, he was the son of our health commissioner. The chief of staff of our mayor. Well-to-do. So when I think his validation sadly, if you are in a place of power, please validate those people around you who might not be at the table really opened the door for me.

So I think the combination of having a great stage set and relationships built prior to my coming. The fearlessness of belief that people who are funding and people who are -- whoever, whatever stakeholders, we all essentially want the best. And I'm like -- sometimes I just break it down real plain. Babies are dying. You want babies to live because you're not a monster. Is this really a conversation we're going to have.

And most people are like what's the argument? You're right. There's there was that.

And the racism piece was a little much. So it was like on the Ohio river. Barely a free state. And that conceptually is inaccurate anyway. So I -- there was a little nerves around that, but I think to Jill's point, relationship. And trust had been built and I was like let's try it and see what happens.

>> SHAADY: And can you share what it's been like to have that kind of support to develop and evolve and pursue your vision? Has it opened up other doors? What has that been able to do for you as a leader and for your organization?

>> Meredith: I'll say A, I'll go back to it wouldn't have happened if it was not trust-based philanthropy and I think Lorrie's point about the fence is the perfect example of it's minor but it is so important it will ruin everything if you cannot trust the people who are most impacted by this problem.

And so that was huge. And super important. I think on top of that, the data from the minute the Queens Village work was lifted, we were the second highest county, our size in the nation, with the highest infant mortality rate. And as soon as we lifted -- I will also say it's not the Queens Village work entirely.

It's that everybody doing collective work. Social determinants of health organizations, you name it, hospitals, OB/GYNs, midwives, all working in lockstep. But we intend to lower the infant mortality rate every year and saw the lowest infant mortality rate on record for us in 21. So I think longitudinally still marching in the right direction around success, which is extremely helpful and gets back to data.

So people who are doing this work, want what is best, all of us. We're not asking for dollars so we can squander them, we're asking for them so we can help. We're overworked and under paid. We're not doing it for the fun of it. We're doing it because we want to see change. So there's that piece.

I'll also say this work of leadership around people who are most impacted by the work has shifted the way other funders in our city operate. So I was talking to some other funders in our city who are wonderful people and they're like we're trying to figure out how to operate like Bi3 because they see the impact of your work and your relationship.

These kinds of conversations happen. It's happening locally, it's happening in a larger space, it's happening nationally. So I can see the shift in thinking, and also the change in outcomes, truly grateful. As I just write some reports and I think about how the new reports are going to impact outcomes and people and families and health, it's just beautiful. So I'm grateful for this conversation, for the work, for all of the funders on this call who are going to be trust-based philanthropy funders



>> SHAADY: That is beautiful and that is so inspiring and it is such a reminder that when nonprofit leaders have the space to listen and respond to what the community says, it inherently leads to better work and better outcomes. I mean that is just like -- Lorrie, please?

>> Lorrie: I was going to say what I love about this so much too is that like when you lock a grantee partner into the activities that they mentioned on their proposal, it's like what if they don't work? So then they're afraid that like they're going to lose the money if this doesn't work. But they know it doesn't work.

So the flexible funding is actually more beneficial, because you're saying go do what you do best. We know you're the expert. Here you go.

The other thing I wanted to mention was the piece about testing assumptions that Jill mentioned, I love this because it has infiltrated the culture of our organization as well. So not only are we testing our assumptions by asking program partners, but you can do this in a multitude of ways one of which is participatory grant-making. Letting people decide where the money is going or the criteria for the funding if you give the parameters -- as long as that goal, the end goal is shared, then you have to be willing to test your assumptions and let people decide that are most proximate to the issues.

I also say the assumptions, being aware of our own assumptions and biases where one of the things was do the research, well, we tend to rank people higher that look and talk like us, right? So as funders who, like for us, being in the global north, we are not -- I'm not a South African, nor do I know what it's like to be one. Regardless of how long I spend in South Africa.

And so testing and making sure that we're aware of our own biases when we put on you a call for proposals. When we review. So putting that hat on is a really -- like it's both an individual journey, and an organizational journey.

And they have to happen simultaneously, and they may not be in the same place at the same time. So just as a recognition of like give yourself some grace. Do the work, do the research, but also be aware of your own biases. If you are cisgender white male who is from the global north and you're funding in the global south, how are you looking at what you fund and how you fund. I think that's really important

>> SHAADY: Thank you for lifting that up, because it reinforces this phrase that we often use when we talk about trust-based philanthropy. It requires being power conscious. So acknowledging your power and your privilege. And within that, the biases that are kind of built in, that may be from your own personal lived experience, and also just the biases that have been perpetuated in all of the traditional, conventional philanthropic structures and how decisions are made.

So there's a lot of internal reflection and checking that needs to happen throughout this, which is part of that iteration.

I want to come to this question because all of you are really articulating this point around one of the most important things for nonprofits is to be accountable to their community. As a funder that's kind of building a new relationship, how do you assess for that community accountability? How do you do the homework on it? How do you observe it? Maybe Jill I'll bring this question to you.

>> Jill: Sorry. I lost my mute button. So getting to know the organization. One the principles is doing your own homework. And so getting to know the organization, what they do. Their mission. Who they serve. Are there other funders who have worked with them in the past. But also being aware that you know, I think a really key question you ask yourself, and I've said this to boards as well during presentations, is do you believe nonprofits are inherently untrustworthy? Because if you're not trusting them, that's pretty much what you're saying. If you feel like you have to hold them accountable and seat these metrics up and hold their feet to the fire, in essence you're saying you don't trust them. So I think it's really important to lean into that trust.

And so we -- some of this work takes courage. It's being courageous and partnering with someone new that you read their website, you've talked with them multiple times, understood them. Maybe you do a site visit. Maybe you talked with someone to learn straight from them how important this organization is to them but it takes courage.

That courage to say we've never worked together before but let's try it. Let's get to know each other, let's learn -- like I said, you are never going to fail if you have a learning mindset.

>> SHAADY: Yes. And this is also speaking to the risk capital that funders have. We talked about this in the previous session so if you missed it I encourage you to check

out the recording of that session. But we really did talk about the part of the role of philanthropy is use that risk capital to support the visions and see what's possible and learn from it.

So there is this question that we often get that I want to bring both to you Lorrie and Jill and hear your reflections and also Meredith. Is just this question of okay, so you're giving me unrestricted funding. Maybe you got the check in. If we're talking about mutual accountability, have you had an experience where things went awry? Like something wrong or the partner like mismanaged the funds or there was some weird staff turnover things happening that you didn't know about? Just the question is, how do you have situations where something went wrong, and what did you do? Especially after having established a sense of mutual accountability? And I would love to hear first from Jill and Lorrie and Meredith I would love to hear your reflections on this as well.

>> Jill: A lot of times, Shaady, to be honest, it comes down to communication. Or miscommunication. Everybody brings their own biases and expectations to the table, and sometimes when you get into the work you may view things differently than the other partner that you're working with. Or you may not be aligned in your thinking. So it's this, in my opinion, it's a relationship. It's like even my best friend and I will disagree or see things differently, right?

But it's coming to the table and listening to each other and understanding how -- where you're each coming from, and how you get to mutual understanding and a path forward.

So it's not this immediate power dynamic where well, we gave you the money, so this is the way you need to do it. It just come down to when things are going awry, usually the approach we take is let's get everybody in the room. Let's identify the problem or the miscommunication, and let's work through it so we can join forces and move forward.

>> SHAADY: Thank you. Lorrie, do you have any specific examples of things kind of going awry or an issue with a grantee partner?

>> Lorrie: Yeah, I'll agree with Jill that it's definitely about communication and bringing it all in. I think when people think about red flags it has a negative connotation. I think

we have to rethink what a red flag is to us. When we see something that we think -- you know your gut is just not comfortable with it. We could definitely acknowledge that, but we can't jump to the assumption that they've misspent money or something like that.

We have to just use it as a -- just a flag for us to say okay, now could I be curious about this? What's going on with this. And it did happen once, and actually what's sad about it is that the organization ended up closing down because of it. But it wasn't anything that we necessarily did to close down the organizations. It was definitely a lot of internal strife. There was an organization that was ex-pat led. I will make that note because it's an important note, because all the other staff were local. And there was a lot of tension between the executive director and the staff. And it came to a head with it was a capacity building grant that we had issued in addition to their core grant. And they were -- it kind of came to our attention that they weren't really sure like where the money was spent. And they had had a few issues so we were okay, let's chat about it. So we -- as Jill was mentioning, brought everybody into the room. Also talked about it separately.

But there was a whole undercurrent of real problems between the leadership and the rest of the organization and the workers. All of these kind of more unfair things were coming up. And we wouldn't have been able to actually talk candidly about that, if we didn't have the relationship with not just the executive director, but we also had relationships with some of the people in the community and the head of the finance department, and we had been down there so we got to talk to a lot of people in the organization we also got to people who they work with in the community. And unfortunately their board ended up disbanding so we didn't necessarily have to take action. So what we just said you have our grant already and you have spent the money on -- they still did good work and it left a little bit of the void in the community which we tried to fill by saying whoever is going to fill that void, we would love to chat with you about how we can help. But that wouldn't have come about without our ability to have relationships with folks. And so we recorded everything. It was actually quite a long process. A months long process of documenting all their conversations and saying okay, we've got this, we've got this, we've got this person's story. And in the

meanwhile some of the staff are actually protesting and striking. Like going on strike with the work.

So there was a lot of undercurrent. And it had been a couple of years whether we could notice it, but we obviously don't want to overstep our power bounds. So that was a really careful thing we had to do. But it definitely came to a head when their board disbanded and we couldn't give any money to them anymore. But we did look to fill that void once they left. Yeah.

>> SHAADY: That's a really good example of how you can lean on relationships to help you guide through these moments of strife and if you had not had these relationships with the staff and other community members, you wouldn't even have had the alert that something is going on. I think it speaks to how relationships can actually prepare you better for some of these moments.

Because they will inevitably happen, because there are humans and bad actors in the world. But I think the way you were able to respond had a lot to do with your relationships.

I'm realizing we're short on time so I want to bring a slightly different question to you Meredith and kind of close us out with a series of reflections from all three of you, but starting with you Meredith, really kind of thinking about how we have a lot of people who are listening in today who this is maybe really resonating with them and they're just kind of like how do I get started or what can I do or what can I do differently.

So my question for you, Meredith, is you know, really kind of given your experiences as a nonprofit leader, doing this work, responding to the community, developing and kind of translating vision to reality, what advice do you have for funders that want to cultivate mutual accountability with their grantee partners? What behaviors or actions should they be kind of thinking about, if they want to do that?

>> Meredith: The first thing is every grantee wants money. So if you want to reach out and have a conversation, even if this conversation is just to understand their work better, to better understand how it fits in the puzzle pieces of your work, maybe it's not to give money in this moment. But that also benefits them and starting to create relationship, learning to understand and talk to, it's intimidating at times. We're all doing this dance to the rhythm, trying to get the rhythm you want us to be on.

It's a lot of work and a lot of stress. The more we normalize conversation, the merrier.

I'll also say come. All we do is create events and be present for each other in the community and we want you to come and see the work that we are doing. It helps you to know what you want to invest in and how the puzzle pieces that work together. One of the things that happens for us the other people that Bi3 is funding, we get together to talk about how does that work intersect.

It's a beautiful thing, it's very helpful.

The other piece is we are constantly putting out, as you pointed out earlier, social media, Linked In, publications, whatever. Even if it's a comment on the chat. Great work. Where we see you.

It's old, as we've said a million times, in relationship and trust-building and there's not a moment where you're going to say something kind to question someone just to validate it. Because that's just the thing you might need today to keep going. So that's one of my suggestions

I would also say try it. You don't know until you try it. Sounds very old school, but it's working

>> SHAADY: Wise words.

>> Meredith: Let's not recreate the wheel if we know it's working.

>> SHAADY: Jill, a similar question for you, but I want to add a qualifier to it. We often hear from people like okay, this sounds good, but this just sounds really time consuming. I don't have time to do this this way. What advice would you have for someone like that who's just like I am just too stretched to be able to do this relational thing and this mutual accountability thing. What are some ways to do it that don't feel so burdensome or seem burdensome?

>> Jill: I would challenge funders to think about trust-based philanthropy is an approach to the way you do your work. So in many ways it's not working harder, it's just working differently. So instead of collecting reports and putting in your packets and filing where you need to go and reading all of them, it's picking up the phone and having a really valuable organization -- converse to learn what's working, what's not working.

Instead of the grantee spending hours on this report that you may get and you may read and check the box and say all right, we got it. And you don't even learn as much or appreciate one another as much or if you're relying just on reading reports.

Same thing with applications. Like we are very focused on what do we really need to know? Because we don't need to ask check-the-box questions. What are questions that are going to allow us to get to know the grantee better and how we can work best together.

So I would say Shaady that it's not working harder, it's just working differently in many ways. And it's the commitment from the team that they want to practice in this way, they want to build relationships, not just write checks and be the cop in the room to make sure that the work is getting done.

>> SHAADY: Absolutely. I think you're reinforcing that all the six practices are kind of interwoven. When you are simplifying and stream lining processes and not spending all this time reviewing supports and proposals you have more time to build relationships.

When you're giving multiyear unrestricted funding, you're able to be in a long-term relationship. And when you're transparent and responsive, you get partners that are transparent and responsive to you. It all kinds of builds upon the other. Each practice builds upon the other.

>> Jill: And I think, Shaady, just like in life, your relationships are different with different people. Like Cradle Cincinnati, we are investing millions of dollars in that work. And it's a heavy lift to reduce infant mortality. It took us a decade to see the results we were hoping to see. And so of course we may spend a little bit more time talking with Cradle Cincinnati than say a grantee that we gave \$40,000 to, to continue the great work that they're doing.

And it's not that we're not engaged with them. We still call them, we're still their partner, we lift their work up, and I think that's another great way we can help our grantees and be supportive of them is lifting them up. And that can be as simple as sharing on your social media pages, lifting them up in a newsletter. Inviting them to attend a summit with you. Which, we invited Meredith to the birth equity summit. she got to know other funders and it led to an invitation to her to share our work at the

White House just recently. So it's really taking those opportunities to lift your grantees up, and that just opens more doors for them.

>> SHAADY: Beautiful. Lorrie, you're going to get the final word as we wind down the panel portion of today.

What is your advice for a funder that wants to just take a step towards building mutually accountable relationships? What's one thing or action you would recommend?

>> Lorrie: Trust-based philanthropy and equitable practices, it's about being and not doing. I mean it is about doing but it's about being. He some if you can like it really does lean into your values. When you value equity, when you value trust, then everything becomes easier with that lens. And so I think try to avoid the paralysis. There's a lot of really good -- I mean especially on the trust-based philanthropy website, there's some great resources to get moving. And I would say along with that, like looking kind of internally at each -- at you, yourself, as individuals. To help get that moving also at the organizational level. Because they do have to happen simultaneously.

>> SHAADY: Beautiful. Well, thank you to our fabulous panel. Lorrie Fair Allen from the Charlize Theron project, Jill Miller from Bi3 and Meredith Shocley-Smith. This was beautiful and invaluable and I'm going to hand this back to Chantias. Thank you again to our wonderful panelists. Join me in giving them applause.

[ Applause ]

>> CHANTIAS FORD: Yes, absolutely. Thank you so much. Wow what an inspiring message, really great anecdotes there, really helpful to really conceptualize what we're talking about here with mutual accountability. We're not done yet. As a reminder we still have another portion of this programming to go where we'll get a chance to reflect and think more about this and how it applies to you personally and to your work.

So just as a reminder we're not done yet. But of course we want to recap it and I could give five different slides for the key takeaways because there were so many good nuggets there they gave. As a reminder a trust-based philanthropy approach does prioritize that mutual accountability. Encourage you as funders how you're accountable to your grantee partners and how you can be better partners to them.



Mutual accountability helps to right-size that power imbalance we see in the sector and build those stronger funder-grantee relationships.

We talked a lot about that multilayer accountability. And so it's important for you to consider that. Grantees are accountable to the community. You as a funder are accountable to your grantee partners as well. So it's important to consider all of the different players in this relationship.

In the ways that your actions or inactions may be affecting their work.

And finally conventional grant-making practices don't explicitly elicit better accountability. Trust-based accountability really leads to better relationships, better transparency and better accountability across the board. Just a few key takeaways there. Deep gratitude to the panelists for such an amazing job. Wow. How wonderful.

Just as a note, we'll do that closing poll again. We love to hear from you all. How confident are you that you can answer the question now? You have a much better idea what this looks like, how to be a better funder, how to be more accountable to your grantee partners.

Maybe you're somewhat confident, you have more examples now, need to reflect on it some. Think about how this applies to your work. Maybe you're not confident at all. Maybe you got pulled away into another meeting or email and missed everything and have to go back and watch the recording. That's fine too.

Most people are much more confident, very confident, 60%. And then 40% are somewhat confident. So much better. It's always great to see that shift happen from beginning to end. Happy to hear that you all are more confident in how you can answer this question. Thank you for participating in that.

And now we're going to have that space where we'll be able to talk through this a little bit more, reflect on what this looks like in your practice and in your work. Again, deep gratitude for your participation. We encourage you to please take that evaluation. It helps us as we design future programming, the resources and the recording will be shared, and of course we hope to see you at our next session. We've got some questions on learning, evaluation, impact measurement, all that great stuff. We'll be talking about that on July 12th. So please see us in that next session.

The PSO breakouts are open. Even if you're not a member of a philanthropy-serving organization you're welcome to join. We'll also have the main room open for discussion there as well.

I'll pull back up the slide that has the PSOs. So you can see which one you may want to join, and we ask if you're having trouble getting into your breakout room, please put it in the chat. We have multiple different staff members that are helping get people into the different rooms. So if you say it, it's harder to know who's talking but if you put it in the chat we'll like it and that means we're putting you in the right room.

With that I will pause to stop the recording.