

# Uncharted Territory: Preparing for the Long Road Ahead

**FAMILY PHILANTHROPY'S RESPONSE TO COVID-19**

**WEBINAR TRANSCRIPT**



**NATIONAL CENTER FOR  
FAMILY PHILANTHROPY**



### COVID-19: Response and Recovery Resources for Giving Families

This NCFP Content Collection features resources and articles from the field, examples of family foundation responses, and interactive map of local funds, upcoming events, and more.

### A Call to Action: Philanthropy's Commitment During COVID-19

The Council on Foundations invites funders and others leaders to sign a pledge to provide flexibility to grantee partners.

## Webinar Description:

COVID-19 poses an existential threat to the lives of millions and communities across the globe. There are many unknowns at this point; yet as the world waits, giving families are searching for ways to help and provide support. Grantee communities who were at risk before COVID-19 will now be faced with additional social and economic consequences, and service providers will have their own challenges. How should philanthropy focus its giving and attention during a global crisis? How do families support the health of their grantees and surrounding communities while working to keep nonprofits financially resilient in the midst of disruption? In this webinar, hear from sector leaders who will discuss the long-term philanthropic response to the crisis, how to support grantees with an equity lens, and ways that funders can bolster the long-term financial and organizational health of the sector.

## Speakers:



**Antony Bugg-Levine**  
CEO  
Nonprofit Finance Fund



**Patricia McIlreavy**  
President and CEO  
Center for Disaster Philanthropy



**Diana Scearce**  
Principal  
Diana Scearce Consulting



**Nick Tedesco**  
President and CEO  
National Center for Family Philanthropy



**Marcus Walton**  
President and CEO  
GEO

**NICK:**

Good afternoon, everyone, and apologies for the technical difficulties. Thank you for sticking with us. And thank you for joining the call today. We recognize this is a difficult time for everyone but we are heartened to see so many of you interested in joining a dialogue around what we can do to support our communities during this crisis. We can't control this terrible situation, but we can lift each other up and provide support and community to one another in this time of need.

My name is Nick Tedesco. I'm the President and CEO of the National Center for Family Philanthropy. As many of you know, NCFP provides donors and their families with resources, expertise, and community and we are here to support you during the weeks and months ahead. We are witnessing an outpouring of love and support from people all across the world and, in particular, the philanthropic community.

So many families are inspired to act, to embrace their role as a passionate giver. Yet, there are so many unknowns.

With the needs of our community in mind, we planned this discussion today to tackle three key questions:

- First, how can you support the health of yourself, your family, your grantees, and the communities you most care about?
- Second, how can you reduce uncertainty for your grantees and the community?
- And third, in this uncharted territory, how can you prepare now for the long road ahead?

We are joined by an expert panel today who will field questions from you and some pre-prepared from us as well to address these questions and many more.

I am delighted to introduce Antony Bugg Levine, CEO of Nonprofit Finance Fund; Patty McIlreavy, President and CEO for the Center for Disaster Philanthropy; Diana Scearce, Principal of Diana Scearce Consulting; and Marcus Walton, President and CEO of Grantmakers for Effective Organizations (GEO).

Patty, I'd love to start with you. The Center for Disaster Philanthropy has been at the forefront of the COVID-19 crisis and many, many other disasters and crises. Can you start by sharing a little bit about the national response?

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**PATTY:**

I think if you look at the numbers, Nick, you're going to think, "okay, we're in a really good place." We've got **\$2.9 billion contributed already** and, contrasting that with previous crises, it looks like we're in a really good position. And even for the US there are 132 funders that have provided \$614 million in the US, which is almost twice what we've ever fundraised before for a crisis.

But we cannot rest on those numbers alone. If we compare this response to other disasters, the scale of this crisis is so much larger than anything else that we've experienced and we need to keep that in mind when we're looking at this situation. We need to really recognize that this is a global crisis, this is a national crisis, it's a multi-sectoral crisis, and it's immediate and long-term. It's going to be felt by hundreds of millions of people globally, if not a billion. We just need to recognize that the numbers we're going to be talking about for philanthropy are going to be way beyond what we've ever seen in the past. I think we also need to be cautious not to fall into a paralysis of it being too much need, too many options, a lack of clarity of where we can help. We really need an outpouring of giving globally in the US to address the concerns we're going to be talking about on this podcast and also as we go forward in the future and learn more.

**NICK:**

**You talk about the fact that this is an extended time and needs a lot of resources. Can you talk a little bit about how we actually prepare for long-term recovery?**

**PATTY:**

Well, we need to prepare for long-term recovery now. I mean, it's never too soon to start looking at it. I think when we're looking at the immediate response a lot of our focus is on the illness and in many ways that's where it should be: preventing it, mitigating it, and helping the frontline responders get what they need for the immediate impact. But, as with any disaster, the recovery on this is going to take months if not years. And this crisis is creating socio-economic issues beyond the medical that we're seeing and that we're talking about. Beyond even the food security which is another area where

there's attention that has been paid. It's going to be loss of jobs and livelihoods. We're seeing that already with the unemployment numbers going up. There's going to be reverberations from that alone in terms of number of people losing their houses, people losing their nest eggs, people just having huge needs and having to rebuild. There's going to be loss of schooling—we have kids going into distance learning, but we all know a lot of the teachers, at least our teachers in DC weren't prepared for this. They don't have a lot of structures and systems in place. My children have the privilege of having a bandwidth that's strong enough, a space that they can work in, a computer where they can do their homework. Not every child is going to have that and we're going to have kids who fall further behind and not every public school system is going to be able to catch up with the distance learning requirements. There's a lot that's going to happen there.

We're going to see increases in domestic violence. People are basically trapped in their homes together under a lot of pressure and lot of strain. We need to recognize that there's going to be those challenges; all these various psycho-social mental well-being challenges that are going to come from the fear that's going on, from the isolation that's occurring from all these other issues. These all have reverberations on people and it's going to take us a long time to look at it. None of these issues will be resolved in the immediate term.

Some of them can be mitigated and there are some programs going in place to try and address that but they're going to require a longer term, sustainable funding model. And the scale is going to make it different than other disasters. But the basic discipline of it is the same and we provided **a few tips on our website** and I'll go into a couple of those here:

- **First and foremost, in a disaster remember that all of us are disaster philanthropists.** We all need to look at that model—exploring how to address the issues from COVID-19 but also the other crises that are still going on. Other disasters haven't stopped just because we've got one really big global one in our face. And so how do we look at that? How do we attend to that? How do we make sure that we are looking maybe at our niche area, but also trying to get the lens on how are we addressing the impact that has come from this?
- **Take the long view; be flexible not only in how you fund but what you fund.** If you have a specific focus, great—whether it's early childhood or vulnerable populations, it's a great opportunity to look at how to bring about change that you maybe were struggling with before. Because this is in many ways going to be a collapse of some things. It will be an opportunity to rebuild and see some of the challenges that have been there and that maybe need some shoring up.
- **Recognize the funding niche of philanthropy.** We have an incredible ability to help out where government agencies can't or won't and that's important to keep in mind—really keep focused on where can we do the best work. We need to share our best practices, talk to each other, and make sure our partners are talking to each other to really ensure that we are doing everything we can to have our funds go further.
- **Lastly, connect with other funders.** Leverage that collaborative philanthropic response to maximize the value that we're having on human, financial, and technical resources donated, and just try and really ensure that we're having the most impact that we can that's great.

**NICK:** Thanks Patty. I'd love for you to touch briefly on some lessons that we've learned from previous circumstances that might apply and I would guess that one of those is to focus on the long-term? It is not just simply having an immediate lens on the funding that you provide.

**PATTY:** I think the interesting thing about disasters is they're all different but they're all at some level the same as well. And I think we all tend to think, "This is unique, this is different, this context is special," but there's a lot of commonalities and threads that we really need to be calling upon and calling ourselves out on. Vulnerable populations are almost always vulnerable in a disaster in the same ways. These populations need us to pay a lot of attention on how to access them, to how they can access services, and how they can be part of the solution.

We had a **Center for Disaster Philanthropy webinar** on this which gets into some of the lessons learned from past epidemics which tries to pull out some of those threads. A few things that came out of that webinar:

- **Be compassionate with yourself and with your grantee partners.**

Don't forget kindness is going to go a long way in the current moment and we really need to keep that at the forefront of our work.

- **Maintain a broad lens.** As I said earlier, the other crises are still occurring and if we all just focus only on COVID-19, we're going to miss a lot of other vulnerabilities and other places where people are falling behind and need our assistance. Make sure you don't get all in on COVID-19, but instead keep that broader lens.

- **Ensure we're meeting the basic needs of food, water, sanitation, hygiene, and income.** I mean, those are critical and we really need to make sure people are shored up in those areas before we bring in other longer-term ideas.

- **It's a marathon not a sprint.** For anyone who's done marathon training, it's a lot of work. It's exhausting and takes a lot of effort, but it's well worth it and rewarding. But, you know, money will need to get out the door quickly. We need to get those first runs in but we also need to remember that we're going to have to be in it for the long haul and keep going—so we need to fund now and fund later.

- **We need to be flexible about how funding is spent.** We need to really have an open conversation with our grantees. What are you seeing on the ground? What is changing? What is altering? What do we need to adapt? Have those open conversations and let them know that you are willing to be adaptable, of course within the parameters of accountability. We don't want to relax accountability, but we need to share our understanding with them that we're a partner in this in terms of expectations, deadlines, outcomes, and timelines. We know that the situation is fluid and changing.

- **Lastly, "go big."** In 2020 and 2021 we're simply going to need a lot of funds. We're going to need everybody in. I know it's a difficult time and all of us are feeling the crunch of the economics in the same way that those we're trying to help are and especially some of the foundations. But it's going to be important that we invest to gain return on our investment and we all need to be part of building back the economy and helping people get back up on their feet. And so again we need to dig deep and maintain our commitment to our grantees.

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Patricia McIlreavy

**NICK:** Thanks Patty. We'll come back to some of those points with additional questions later. But now I want to bring Marcus into the conversation. Marcus, GEO has been at the forefront of talking about emergency response for grantmakers during this crisis in particular, but many others as well. I'd love to hear from you about some of the measures that grantmakers can take to lessen the burden on grantees during this time.

**MARCUS:** Thank you so much for creating this space. Much of what I have to offer was covered in some way by Patty so kudos to you Patty for organizing that and bringing some really important points to the forefront.

I'll underscore some of those and really emphasize areas that maybe we aren't considering in our reaction to the moment. Nick, one of the important components about responding to similar situations—emergencies, if you will—was captured by Patty and how she describes the long-term view. There are some ways in which good intentions can translate into exacerbating historical disparities. And one of the things that we offer, especially as we consider the vision for how GEO wants to really make a difference in the way that the work is being done collectively, is that we be intentional about how we support each other's strategy. Starting off by not going it alone. And this practice and this webinar is a great example of what that can look like as a norm for the philanthropic culture of our sector.

Another example of that is understanding the strategies that are taking place in our colleague organizations; being intentional about learning more about the work that's happening across our grantee network. So that's having a geographic focus, identifying local trends, and raising the profile of leaders who are advocating for the types of resources Patty mentioned from all types of scenarios that are already underway. This includes the census as well as all types of areas of focus that strain

the capacity of nonprofits already. Now, we can be intentional in understanding that this may be the “tipping point” for some organizations and the situation requires us to loosen some of the restrictions that for good reason were in place but could serve as structural barriers to progress now for the very grantees that we hope to serve.

I’m almost advocating for a “zooming out,” so to speak, for our philanthropic colleagues before we jump in. By zooming out, let’s consider the potential unintended consequences of our efforts, making sure that we check in with the people on the ground who we want to support to ensure alignment around any decisions that we come up with. Especially when it comes to prioritization of interventions; we must ensure that we engage in some way the perspectives of the people that we want to serve with our investments.

**NICK:** **I want to expand on that point. It’s more crucial now than ever to consider equity as we support the health of grantees and the communities at large. What can funders do both in the short- and the long-term to make equity a cornerstone of their response?**

**MARCUS:** I appreciate that. I want to start big. And then I’ll get really specific Nick and hopefully I can do this really quickly for you.

One is there may be some practices in the past that we can use in this moment to catalyze change quickly. One of those things is being audacious—I’ll use that language. This means not just focusing on *what’s practical* and expecting there to be some exponential impact from that, but really considering *what’s possible* in this moment. And that takes courageous leadership, which is why going it alone is not necessarily the approach that best serves us in this moment. When I am sitting next to you knowing that I have other colleagues side-by-side that I can rely on, I’m just compelled to tap into a different level of courageous leadership that allows me to consider options that alone are not as accessible or emotionally accessible. It’s understanding that people are at the heart of this work and that even as an instrument of institutional philanthropy people are at the center of the experience on the grantmaking end as well as the receiving end of our work. So, let’s make sure that we are considering the individual impact of how we support each other as leaders and how we envision the impact of our work collectively.

I also want to go to *vision*. I often wonder—and at GEO we talk about this a lot—what is our common aspiration for the sector? Directionally what’s our shared vision for our work? I’m from Cleveland, Ohio, a hardcore, blue-collar town that emphasizes family and community and country, right, and values. At the same time, it’s a hard-working community and one of the things that I always take with me from that background is some of the advice I use to hear sometimes on Sundays from the elders in our community. Sometimes it would be some of the elders collecting over at my grandmother’s house—basically there’s this saying that “without a vision, people perish.” It’s rooted in the religious and spiritual background of various communities in that town and I bring that forward into philanthropy. On a regular basis, I ask, and some of you **may have even heard me before**: “What is our vision? How are we mobilizing our efforts and our resources in philanthropy toward a common goal?” I think this is a moment for us to capture that. GEO is a great resource for this, and I’m really looking forward to working with our colleagues inviting us into more intentional conversations to explore and refine a clear vision for the field.

And lastly, I’ll say that **trust-based philanthropy** as a platform has captured overlapping, interconnected steps that are very specific ways in which philanthropy can respond to these moments and consider all of the different components of equity that we know are core to our mission and mission critical to our organizations. I’ll just briefly cover a few of these:

- **Multi-year unrestricted funding**—many of us have talked about that and will probably refer to that going forward.
- **Let’s do the homework and get to know prospective grantees and not the other way around.** We shouldn’t expect or react or respond to grantees coming to us in this moment when we already know that grantees were already operating with limited capacity and this may just be the straw that breaks the camel’s back for many or most of them.
- **Let’s simplify and streamline paperwork.** Allow nonprofits to be more effective and freed up to be reactive in their own ways as they’re hearing on the ground from the people who need support the most. And let’s just listen and act on the feedback that we get from our colleagues.

These and many other points can be found on multiple websites now, thankfully you can go to [geofunders.org](https://geofunders.org), but we also know that the Council on Foundations has worked closely with the Ford Foundation and other groups to position this work on their website. I'll also say lastly that on April 9th we will be giving a [webinar about the trust-based philanthropy](#) in case people want to learn more in detail about that.

**NICK:** **Thank you Marcus. Antony, I want to bring you into the conversation. As a leader of the Nonprofit Finance Fund for many years, you've witnessed a number of financial disasters, including the market crash of 2008. What is the situation as it is emerging now for nonprofits as we look at this dual health and economic crisis?**

**ANTONY:** I think it's really important for people to recognize that this isn't just a crisis of responding to a specific health disaster. The distancing is choking off revenue at an unbelievably rapid rate. It is unprecedented at a national scale. We were active after 9/11 in lower Manhattan, which was much more bounded geographically and even that experience was less dramatic. I think it's really important to realize that there's almost no organization that you as a funder support that is not going to be affected by this.

Just to give you some examples: The United Way of Newark, New Jersey generates quite a bit of revenue by being the largest provider of tax preparation services in the town of Newark on a contract from the government for low wage earners. This is a program they were administering by training college students to volunteer and provide the services. Most importantly, those college students are no longer in town, that service has now been dropped, and the most important impact are the other people who now are going to not have tax services and are going to pay more than they need to. And finally, for the organization itself, the United Way, they've got a revenue source that's gone to zero.

To give you another example—we were with an amazing group in Philadelphia that partners with homeless shelters, veterans groups, and people returning from incarceration and helps them get jobs. This nonprofit organization derives their income by having companies pay them to source work crews for their work. That work has gone to zero—as have the revenues—and I could be telling this story over and over again.

So, almost any organization you care about and any community you care about is being affected not just in terms of immediate response but by the social distancing more generally. The other thing that's really important is that small businesses have tended to respond to a similar dynamic—restaurants and other businesses where their revenues have basically gone to zero—by dramatically cutting costs and firing people. That is not what your nonprofit partners are going to do. That is just not how we are wired. Nonprofits are resourceful, committed. We have a client out in Tacoma, Washington who is 45 minutes away from where this whole thing really began in the United States in Kirkland, Washington. It's called the Tacoma Community House and they are a community center that has been there for more than a hundred years serving immigrants and refugees. When I called the head of that organization when the news out of Washington State first broke she was very clear: "We are here, we are active in this community we've served for over 100 years. We are not asking people where they have traveled to or where their country of origin is because that's not who we are. We are going to be here." And I can tell you that story over and over again. On one hand there are groups who see revenues just drop out completely from under them and then there are other groups that are saying *no matter what orders I get from the city or the state I will serve my community*.

We worked with an amazing organization in New York City that provides services to young people, many of whom are LGBT and who are homeless. They've been driven away from their homes by families that are intolerant of their identities. They are not going out of business. They're not shutting the doors at the same time that they're facing these revenue shocks. I have to say the face of the people I've been speaking to—our clients who are these nonprofits—the only word I can use to describe them, at least the last week, was haunted. I think people are now starting to get

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reconciled—everyone is struggling and some are struggling better than others—that this is not like anything we’ve ever seen. And it’s not just the frontline health workers, although that’s an important place for philanthropists to focus. It’s anything you want to be working on.

**NICK:** **How can we best fund or support the financial health and sustainability of the nonprofits and the sector?**

**ANTONY:** Yeah, so I just can’t emphasize enough—go back and listen to what Patty and Marcus said—I just want to give my “plus-one” on everything they said. Now is a time to follow the principles that have been out there: be focused on their needs and not your own needs. Be flexible and enter into those conversations with trust and understanding. There’s been some incredibly exciting elements coming out of this crisis. What might have been seen as bold and uncomfortable a week ago now becomes quaint and I almost feel like new norms are happening every week.

When this crisis started a few foundations said, “well, maybe we will release restrictions and for six months let people take the money and do what they want to.” There are now **512 people signed up to the pledge that Marcus mentioned around those principles of trust-based philanthropy**. So, that idea of being flexible and meeting your grantees where they are, I think we have made more progress on that practice, which Marcus’ organization and my organizations have been pushing for decades, practically there’s been more progress on funders becoming more responsive to grantees in the last two weeks than at least the last 20 years. And I don’t think it’s hyperbolic to say that. Continuing, I’m excited both for more funders to sign up to that way of working and also to ask ourselves why we ever worked in a different way.

In New York City, I’m very excited that today we just launched a **Loan Fund** that will complement grantmaking. I don’t think lending is appropriate in most cases—there needs to be a massive infusion of grants from the private and the public sectors—but there’s a role for lending and we were able to get a \$29 million-dollar loan fund launched this morning that we first conceived of last Monday. We had a kickoff meeting last Wednesday with the Ford Foundation and are starting to take loan applications today. We’ll make our first loan next week. It’ll be about 16 days from conception to lending. That’s exciting and the work I’ve teamed up on has advanced just through emails from the team at the Ford Foundation explaining what they would be willing to do in terms of the flexibility to make this work for the borrowers. We are running this thing on a two-page term sheet. It’s incredibly exciting. The question I would ask is what elements of that can we continue afterwards? What value did we get from taking nine months previously? And, more importantly, why is it that in a moment of urgency we’ve been able to prove in so many ways that we can work together in mutual trust, respect, and urgency around this crisis? Let’s maintain that spirit around the other crises that continue to linger in our society, whether that’s racial inequality, income inequality, or domestic violence as Patty mentioned earlier. There’re so many other areas where I hope funders come out of the experience with the same sense of urgency.

The last thing I’ll say, and Patty mentioned this, is that this can be overwhelming. There are no amount of private donations that will solve the problem. We have to be working in a smart way with government. We are more encouraged today than we were three days ago with **the bill that came out of the federal government** and the way they’re making potentially money available to the nonprofits you care about.

We have also found that it’s been helpful to think about your role as a philanthropist in three different phases. There’s the immediate response which is enabling your nonprofit to survive. There’s a need for recovery funding—they will survive by burning their reserves to zero, by firing half their staff, by selling equipment, and by mortgaging their homes. That response will allow them to live. As a philanthropist, you can also think about what you can help them do to recover to get back to the position they were in to be able to serve the community. And then, finally, to build resilience. I deeply believe that resilience is not about an individual organization’s financial situation. It’s about the kind of systemic change that Marcus mentioned of how we as a philanthropic sector interact with nonprofits. And I believe resiliency is going to be built out of this in a systematic change of the mutual respect that we are able to build this sector around. And that to me is what can be hopeful in this moment that’s incredibly scary.

**NICK:** I think that framework is really powerful. Thank you, Antony, and we'll come back to some of those points in a little bit. I want to bring Diana into the conversation. Diana, you've been doing some research on nonprofit resiliency. I'd love to hear a little bit about how nonprofits can weather the disruption that is brought about by this dual crisis.

**DIANA:** Sure, thank you. With support from the S. D. Bechtel, Jr. Foundation, I've had the privilege of being in conversation with nearly a hundred nonprofits and funders about their experiences responding to a whole range of disruptions. This was between the fall of 2018 and the end of 2019. We were looking at internally and externally driven disruptions, very slow-moving as well as more sudden and volatile disruptions. Examples include loss of major funders, leadership transitions, economic booms and busts, policy battles, cyberattacks, hurricanes, floods, the list goes on.

We wanted to figure out what contributes to organizational resilience for nonprofits. We define nonprofit resiliency as *the ability to respond effectively to change and adapt successfully to new and unforeseen circumstances while staying true to mission*. And we found that resilient nonprofits respond to disruptions as tipping points rather than tragedies, finding new opportunities to learn, evolve, and ultimately better serve their communities in the face of volatile and changing contexts.

In terms of how this relates to this current moment, I would say that none of the individual disruptions we explored in our study would begin to amount to what we're currently experiencing. I believe much of what we learned will be relevant over the longer term; many of the characteristics of organizational resilience that we observed were shared by nonprofits that experienced a range of different disruptions. However, this is unique moment and there is going to be lot to learn about what works. So, offer these findings with a lot of humility and appreciation for the amazing efforts that nonprofits are making right now to respond and simply survive.

Seven characteristics stood out as really critical to these nonprofits that were effectively resilient:

- **Purpose-driven.** They were clear eyed—getting at some of what Antony was speaking about. These organizations face the challenges head-on, but preserve a deep faith and belief that ultimately, they will succeed.
- **Future oriented.** A number of the nonprofit leaders we interviewed made a habit of looking to the horizon and rehearsing what might be next, so they were able to better adapt to what was emerging. That's come up in a lot of the comments here. Importantly, they weren't trying to predict the future. They were trying to manage the uncertainty. A few of the leaders we spoke with used scenario planning to rehearse a range of different possibilities as a means of managing that uncertainty. I think that's an interesting consideration right now as we look at huge uncertainties around duration and intensity of all of this.
- **Open communication.** Resilient nonprofits invest heavily in communications with both internal and external stakeholders.
- **Empowered: the leaders we spoke with emphasized cultures of inclusivity and embraced models of shared leadership.** This kind of flattening out of organizational hierarchies and co-creating of solutions was especially important for organizations that were trying to respond to sudden disasters like natural disasters. For example, one health and social service agency in Houston responding to Hurricane Harvey talked about her team's response and said "we would meet every morning to figure out who was doing what. Different staff members led each day's meeting and they would point out things that we didn't know were happening. We still do that now on Monday through Thursday to change the dynamic of the team." We found inspirational examples of how a disruption can change the very fabric of an organization, often for the better.
- **Committed to self-renewal.** Nearly all the nonprofit leaders underscored the importance of intentional investment in self-care at all levels of the organization and modeled at the top. This work took a number of different forms. It was about taking the time to step away from the work when folks felt like they couldn't even begin to spare a minute. Celebrating achievements of all sizes. Providing flexible funds for staff to care for themselves in ways that best met their personal needs. And I think important for this moment, creating spaces for staff to make sense of the trauma that they might be experiencing related directly to the disruption, at a personal level, and to manage the organizational uncertainty that they could be dealing with.

- **And then lastly, connected.** Resilient nonprofits, we found, are embedded in webs of relationships—personal relationships, institutional relationships, as well as community networks. That web of connectivity is really critical to resilience.

**NICK:** **This is really informative. Thank you for identifying those characteristics. It begs the question of what can funders do to promote resiliency and certainly financial support is one way, but I'd love to hear from you a little bit about how we can have a call to action for funders and what they can do.**

**DIANA:** Patty, Marcus, and Antony touched on many of the grantmaking principles that we surfaced through the study. We learned that it really comes down to good grantmaking. The trust-based principles that Marcus called out were mirrored in what we heard from both the nonprofits and the funders that we spoke with. Nearly all the nonprofit leaders called out the importance of being in authentic, open, and trusting relationships with their funders. There were deeply transparent with their funders; things didn't have to be presented as just right on the surface. And the funders concurred.

So, building on those relationships I'd like to add two things that nonprofits called for. One is to *come to the table* and the second is to *stay at the table*. There was one nonprofit leader who talked about wanting her funders to literally come to her table, to sit with her, to break bread with her and her team, and to come to deeply know her work and its context. Of course, things are extremely busy right now; there is social distancing and we're literally not going to sit down at tables. But what are the kinds of remote tables that funders can be sitting at?

The Hawaii Community Foundation shared a powerful story of how they responded to the lava flow from the Kilauea volcano disruption in 2018. Staff of the community foundation were on site, attending daily meetings of all the nonprofits and the community leaders who were making sense of the evolving situation and coordinating response. They were able to listen intently and then move money with as little bureaucracy as possible to the organizations that were poised to make use of it.

And then in terms of staying at the table, it's about remaining committed to the organization for the long haul. If needed, give them the space to craft a response recognizing that it may not be necessary or even helpful to proactively engage when they are so focused on responding to the situation at hand. Several nonprofit leaders spoke about how important it was to simply know that their funders were being patient and holding on as the disruption unfolded and as they were figuring out how they wanted to respond. To close, one nonprofit CEO said to me: "Our funders were most helpful by continuing to fund us and giving us the opportunity to come back with a new vision."

*It's important to step back when the inclination is to step forward into urgency and really be intentional about assessing impact. Really take the time to do the analysis, to be aware of any potential unintended consequences or blind spots that may worsen the situation or work against our best intention. Engaging others with our thoughts and thought partnerships may be that important first step before we decide.*

Marcus Walton

**NICK:** **Powerful. That's incredible. Thank you. I want to move now to just a few questions that I want to open up to the whole panel and then I really want to start to seed some of the questions that we received from our audience. There's no doubt that everyone on this webinar feels called to action. What would you call out as the most important critical first steps? Marcus we'll start with you.**

**MARCUS:** Yeah, I appreciate that. And I appreciate the prompt to have us dig a little deeper. I would say it's important to kind of step back when the inclination is to step forward into urgency and really be intentional about assessing impact. Really take the time to do the analysis, to be aware of any potential unintended consequences or blind spots that may worsen the situation or work against our best intention. Engaging others with our thoughts and thought partnerships may be that important first step before we decide.

**NICK:** So, what I'm hearing from you Marcus—and I just want to underscore these points—is that this is a time to do more not less. This is a time to spend more, to act more, to respond and not to retreat. And this is a time to connect with your peers and to explore how you can lock arms with them. Is that what I'm hearing from you?

**MARCUS:** That's right. It's that cautious first step in service of the very specific steps we laid out and that you just underscored, absolutely.

**NICK:** Antony. I'd love for you to talk about some of these critical first steps that people can take.

**ANTONY:** I always think, and this is true in any work I do with funders, the most important thing is to answer the question up front: *What ultimately are you trying to achieve?* In this environment there are lots of very valid answers to that question. It could be, "there are ten nonprofits in my community who I want to survive." If that's the answer to your question then I think it leads to a certain set of actions. On the other hand, if the answer to the question is, "I want to help create the conditions in which there's greater resilience in the system" that would lead to a different set of answers. We were fortunate to receive a \$250,000 dollar grant from a corporate foundation who said "we are compelled morally to help. We don't have the connections with small local community organizations that you do" and they gave me \$250,000. My accounting department didn't know what to do because the money got wired and there was no accounting code or three months' worth of grant application paperwork behind it. They trusted us to put the money to work and we are very conscientious about that trust. We do this all the time. It is our day job. I think it's striking the balance that Marcus said—it's being deliberative enough and then decisive. Because on one hand the team was saying what's \$250,000 in a potentially \$400 billion-dollar crisis. And on the other hand, \$250,000 could be a lifeline to ten small community organizations.

I would actually argue to be a little bit deliberative but mostly be decisive. There's very little you can do financially that will not help right now—except for one caveat which I will share at the end—because speed is really important. I said this in the [Chronicle of Philanthropy](#)—when the crisis hit organizations took a week, took stock of what they are now losing every week, divided that number into their operating reserves, if they are fortunate enough to have one, and if they are honest with you they will tell you that they have a clock. This is really important. The power dynamics of you as a funder and them as a grantee are going to make it unlikely that they will tell you this, because they don't want to tell you how precarious the situation is because they worry that they won't get the grant at all even if what you're offering is not necessarily exactly what they need. Because we haven't built the kinds of relationships Marcus talked about. But to be clear, there is real urgency of just helping people push that date out further. And now the federal bill provides potentially a huge opportunity to help them access that funding.

The one thing we know about speed is *speed is almost always the enemy of equity*. If you look at all the research on equity, slowing down is almost always what experts would advise you to do to make it a more equitable system. I worry—and [I've written about this as well](#)—that colorblind practices in the context of our racial dynamic as a society often exacerbate inequities. If part of the answer to the question of "what do we want to do" is to help organizations we care about in our community but not make inequities worse, you do need to be really careful. While I've been very appreciative of the funders who have said in an email, "we are willing to release the restrictions on the grant, we're willing to be flexible, call us, email us if you want to discuss that flexibility," that, to me, is a great example of a colorblind policy that will have unintended, inequitable outcomes. Large organizations with better cultural affinity to you and confidence speaking to you as a funder are the ones who are more inclined to take you up on that offer and actually assert with something they want. It is less likely that small organizations led by people with racial identities different than your own as a funder, who don't have that same cultural affinity, and haven't been empowered by our society to make those demands, are going to take you up on your offer. And so that kind of practice which is very well-intentioned can lead to unintentional outcomes on the other end that will make us less likely to have the other side of this be built around the equitable practices we want.

Really specifically there was great moment this week when the Barr Foundation, like many foundations, sent a [letter from the president](#) to all their grantees saying, "we are offering you flexibility and we will negotiate on a one-on-one basis." But rather than saying "let us know if you

need it” they had an immediate follow-up from someone on the team who said, “You saw Jim’s note, now I’m here to offer to have that conversation with you.” And again, I think that while a lot of people on this call may not have large institutional philanthropy behind you, it’s just that slight tweak to practice done with an understanding of the power dynamic between you and your grantees that can be really important. It doesn’t mean you have to slow down, but you do need to be thoughtful.

**NICK:** **Yes, the Mott Foundation did something similar yesterday. I got a very similar note from a specific relationship manager who doubled down on the note from Mott’s president saying “I’m here, how can we be helpful?” And it was incredibly powerful to have that connection. I want to flesh out a couple points that you brought up and then I want bring Patty and Diana back into the conversation. The notion of self-reflection—and this time is so powerful—the point that you called out, that it is imperative for each person on this call and for every funder to ask what they want to see out of their support, right? That’s really powerful. I think a lot of people are uncertain how to answer that question. How do you start to unpack and explore that? And in parallel to that question, you noted the use of intermediaries and trusted partners who can actually go out and find great organizations that are doing good work and take the burden off of the donor. I would love for you to talk about those two points. How can donors begin to know the unknown and how can they lean on people who have a better lens on this?**

**ANTONY:** Like I said earlier you can’t not do good right now. *Pick whatever area resonates with you and be decisive.* I think the challenge of the problem is unbounded in a way we’ve never encountered before and so what is paralyzing donors is a sense of “whatever I do it won’t be big enough.” And that’s where I think Marcus’ point about being collaborative and taking advantage of all the leverage that is out there right now is so important. The smartest funders I’m talking to over the last 48 hours are the ones saying not, “How do I fund my organizations directly” but “How do I help them tap into the multiples of money that are coming through the government programs.” I think that’s being really smart and it’s taking the effort to understand the context of what flows around your organization and not just the bilateral relationship with you. That’s going to be really important. There are **hundreds of these funds** that have been set up exactly to allow people to move money quickly and then put that money in the hands of experts who understand. But I think you need to make sure you’re aligned with where they’re going to be putting their money.

The other thing I’d say that is an important side issue: think about all the assets you have beyond just grantmaking. People who know me know that for the last decade I’ve been **pushing impact investing** as a complement to grantmaking. We’re really excited to set up this Loan Fund in New York City. I can tell you that with that launch this morning, we’ve had 303 applicants by noon. So clearly there’s a need. We’re going to be able to make loans, but it’s definitely time to be creative.

And, again, what might have seemed bold a week ago is no longer so bold. While I couldn’t possibly talk to my family or my wealth advisors about taking some of our assets and putting them into a loan—you can and there are a lot of intermediaries. I mean, we would love to have new partners in on our **NYC COVID-19 Response & Impact Fund** and we’re also talking to funders around the country about setting that up elsewhere. I think that’s a way to get over the sense of being overwhelmed because if you can make a loan where a loan is appropriate, that money will come back to you and can be used for grantmaking. Realize that there’s a huge system now being mobilized around the problem and you can tap into that which I think will help reduce that sense of feeling overwhelmed.

**NICK:** **That’s great. Patty, I’d love for you to jump in on this question of what can donors and funders do now?**

**PATTY:** I think Marcus and Antony have made some excellent points. Just to build off of them, it’s really about challenging ourselves. We have to really challenge ourselves to think differently and to embrace the change that’s here at the moment and not be threatened by it.

We have to get comfortable with being uncomfortable and trying to figure out what’s the space that we can work within that. Even at CDP in terms of recognizing the change that needs to happen within this COVID-19 response, we normally set up funds only for recovery and resilience. And this time we decided we would have part of that for response and that was because we realized that this is a crisis that required us to think differently and to work differently. There’s no point in only thinking about the recovery and resilience if we can’t help funders get money into the hands of implementers in the

response phase. It's just all in all the time at the moment and we just need to really accept that and understand that. And that was a challenge and a change for us and we owned it and we are trying to make the most of it and I think that the same is going to go on for a lot of the philanthropic community.

A lot of the donors are going to have to think about how do we work differently? Maybe you traditionally are only in a certain space or in a certain phase or in a certain environment or with a certain population and you're going to have to challenge yourselves. Is it worth exploring being a little bit different for this response and looking at different aspects of programming and embracing that change and celebrating it. It is going to be important for us to really all be in it together. Because if we go into our different silos and our different spaces and if we wait for the opportunity that fits exactly with what we want to do and how we want to help we may actually wind up missing the opportunities that are there to really make a difference, especially in these early days. We need to help the recovery be that much stronger in the resiliency that much easier.

I think the other thing I would just end with is that we need to focus on the community, but we need to really remember the individual. There are huge numbers of vulnerable individuals and populations out there for whom this crisis is going to feel different to them. We need to really be nimble about how we have responses that are not cookie cutter, and that are adaptable and changeable and explorative to the needs of these populations. We really have to challenge our partners to do that to and to say, how are you addressing physical vulnerabilities, economic vulnerabilities, mental vulnerabilities, whatever they may be. There are a lot of different aspects of how this is going to play out in different communities. So, focus on the community, but remember the individual and try as much as possible to not leave anyone behind.

**NICK:** Diana, any additional words before we go to the audience Q&A?

**DIANA:** Just two additional points that I would underscore in addition to applauding everything that's been said. The first is to stay committed and to recognize what many nonprofits are facing now as they're watching their operating reserves go down. Pretty much everyone we spoke with talked about the importance of having that basic faith that they were going to have funding over the long term. If they had confidence in future funding—whether through a financial cushion, multi-year funding commitments or simply strong relationships with a number of committed funding partners who they felt they could call on, they could be more creative and more bold in their response. Give nonprofits that faith and assurance that they will have support.

And then the other thing I'd say is to take the long view. Recognize that those responding on the front lines as well as funders are going to have disaster fatigue. This is going to go on for months and months and months. So what is it going to take for *you as a funder to be in it for the long haul* and to support nonprofits that are responding for the long haul? Take the long view.

**NICK:** Perfect, love that – “take the long view.” I want to bring in some audience Q and A. I'm going to have Jason Born jump in and ask some of these questions because he's been tracking them. Jason, if you want to start sharing some of the Q & A questions with the panelists, that would be great.

**JASON:** Terrific. Thanks, Nick. And thanks everyone. This has been a fabulous presentation so far and so many good tips and inspirational comments. Our first question actually follows up on what Diana was just talking about. I think think maybe we'll start with Antony and then go to Diana for her perspectives. The question is: Our board is talking about what questions we should be asking the nonprofits without bogging down relief funding but to also be sure we aren't simply reducing existing deficits or problems. How do we distinguish an organization that was already in trouble versus an organization that truly is responding to or in distress from COVID-19 and needs additional and gap funding? We

*Recognize that those responding on the front lines as well as funders are going to have disaster fatigue. This is going to be months and months and months in the making and so what is it going to take for you as a funder to be in it for the long haul and supporting those that are responding for the long haul and not to sort of fall into the “bad-ism” that can happen in funding trends. Take the long view.*

Diana Scarce

**always ask larger organizations if they have operating cash reserves for times like this and very few do, but we may take a look at this with a fresh view in the near future, too? Maybe Antony you could start and then Diana or others if you have thoughts.**

**ANTONY:** Yeah, it's an interesting question. I always believe that the best philanthropy, as Marcus points out when he describes the principles of trust-based philanthropy, are that you find organizations doing good work in the community, verified by the community members, and then you give them unrestricted support because they know better than you do what to do with it.

Not to be a contrarian but, the question of "how do you make sure the money they want from us is specifically because they need it" because they've incurred losses, it's a different way than I would orient the question. I would orient around "is that an organization whose service in the community the community needs to meet the goals you have for the society we want to live in." And if that's the case give them unrestricted funding. I think it is right that there should be a discernment among the leadership of that organization as to what was a structural problem in their business model that was creating deficits versus what is a loss related to this particular moment.

Certainly, organizations that succeed through crises are the ones that are transparent and honest with themselves. It would be problematic if an organization was unaware of the fact that they had a structural deficit rather than just this crisis. I would be probing not so much around the forensic accounts and accounting ratios and much more about your sense of the leadership team and to what extent are they sober-minded... It's a combination of seeing optimistic and inspired but sober and really making decisions and assessments based on an open, honest understanding of what's happening. That's what we think about in our lending practices, much less the financial conditions as it appears on official GAAP accounting rules.

Rather, focus on the way to management team operates—that's what I'd be looking for. First and foremost, are they delivering great services in the community and then secondly, is the leadership responsive and open and honest? But again, recognize that you are going to be filtering that assessment through a power dynamic that makes many of them unable to be honest with you because it is reckless to do so and its on you, not on them, to do what you can to change that power dynamic. And if they feel cagey to you, it's on you not on them to create the conditions in which they actually can be honest.

**NICK:** **Antony that's such a powerful point and I think one that we want to underscore. Redefining the word "need," right? If there is an intrinsic value that has been demonstrated and a capability that has been displayed by this nonprofit by way of its leadership and its strategy and its implementation then you know that is intrinsically valuable and we should support the work that organization does not because they're noting the deficit at this particular time, but just because they're the actual being of the nonprofit and their work is valuable. "Need" is not about a deficit on a balance sheet. It's about the work being done.**

**ANTONY:** But I also think there's a legitimate concern for a donor that "I only have limited money and I don't want to give my money to organizations that are going to go out of business." But what you're trying to do is say, "I give you a grant so that for the next three months you can provide and deliver meals to homebound elderly people who would otherwise starve." I'd say give them the grant and at least they'll do that good for three months. It's less important if the organization survives or not, frankly, if that's what you wanted to get out of it. If again, your goal with your philanthropy is to take organizations in the communities you care about and ensure that more of them survive then I think it is a legitimate question and I get it. I get where people are coming from with that but I just don't understand under any conditions *and certainly not now* why you as a funder would think you know better than your grantees what they need to use your money for and if you have that skepticism about them, then you probably aren't finding the right people.

**DIANA:** If your goal is to help nonprofits doing important work survive, respond, and adapt, I think that this is a moment to lean in to relationships. Be trusting and support the nonprofits that need the funds and to make it as easy as possible for them to access those funds. While I appreciate the question, it's not a moment for new forms of due diligence. There's also an opportunity to step back and say "If we don't know, why don't we know?" How does this create sort of an opportunity for the funder to rethink how they are cultivating trusting and transparent relationships with their grantees?

**NICK:** I think it reminds us that this is a two-pronged crisis. This is a health crisis that needs support to address the relief and recovery immediately and in the long-term, but this is also an economic crisis. We're looking at this through two lenses and I think it's really interesting that we've been getting a lot of questions around, "Should I be sourcing new grantee partners? Should I just be helping the ones that I am currently funding? How much of this should be an expansion of my portfolio or a doubling down on my existing one?" I don't know if any of you have thoughts on that.

**DIANA:** Consider partnerships with organizations and funders that you are already in a relationship with as well as intermediaries. Tap into collaborative funding opportunities. I would not try and build new relationships yourself with potential grantees at this particular point in time.

**PATTY:** Just to add onto that, I'd definitely agree to look at what options are out there for ensuring you can get some of that vetting done elsewhere. And also partner with each other. Explore if others have relationships and save yourself a bit of those efforts of vetting and having that organization go through all those same channels with you about everything again. If you have a trusted partner who you've worked with before another, say "Hey, how's your relationship," and maybe provide a bit of a fast track for a vetting process to take some of the burden off and to really ensure that you can get out there more funding support than you have in the past. Or, if you feel your traditional partners are not responding for whatever reason, or if they are not actually able to scale up, keep in mind that they may actually be impacted in their own ways. They themselves are staffed by individuals. They themselves are impacted in the same way by this crisis as everyone else.

**MARCUS:** I'd be remiss if I didn't highlight this as one of the structural barriers of philanthropy. I think it's really important. I love the clear-eyed language in Diana's **resiliency slides for nonprofits**. I think it actually applies in some ways to institutional philanthropy and what does it mean for us to be clear-eyed in our own limitations. And when I think about this question, I love where Antony offered around the three phases of work and how to think about our funding phases one as responsive, one as recovery funding, and the other for building resiliency. And I heard that as really thinking about our culture—how we do work towards systems change?

The reality is that these moments reveal some of the structural barriers that are hidden or otherwise imperceptible at different moments. When these surface it occurs to me that it's important for us in these moments to be intentional about not allowing the perfect to be the enemy of the good. We need to be super clear and go back to those strategic plans that we've put so much energy and time into and really emphasize the relationships and clarity and the explicitness of our priorities both on the side of the board as well as the staff and then take an assessment and speak to that question of "What is our vision for this work?" And to what extent have we heard from our grantees that gives us a sense of the highest priority? It really is engaging all of the stakeholders, including the grantees, but not excluding board members and assessing the trends and patterns that most align with our highest priorities and orientations. This is a first step, and we can always revisit over time, especially if we join communities of practice that are connected to our intermediaries as we mention in other organizations that make sure we don't try to figure this out all by ourselves. It's a long-term, long view effort and we do our best at each step as we learn.

**JASON:** **How do we best allocate a limited discretionary emergency relief fund among a cohort of grantees and what disaster relief nonprofits are providing the best bang for the buck nationally and internationally re: COVID-19 relief?**

**PATTY:** I'm not going to list organizations I think you should give to...I think that's a bit of a challenge as it really depends on what the impact you're going for and where are you trying to have that impact. We can have conversations offline if people want to have specific ideas of some of the things we're looking at. In terms of grantmaking and getting it out the door quickly, we've already started to look at how to relax some of our own internal requirements. We're working differently in what time frame we are looking at. We are relying heavily on our pre-vetting and just being really quick with some of the checking for new partners who we might be working with, fast tracking them by looking at reputation and references and really trying to move it ahead. In the first tranche of funds we gave out we relaxed

a little bit our board's requirements. We only sent it to the executive committee because we know that we need to get this out quickly because right now we can't have bureaucracies. Not that they're not appropriate, but what is realistically in many ways a quick check of our accountabilities can hold up distribution of funds. The board chair agreed and we just went through the executive committee and then informed the full board later. I think things like that are processes that you're just going to have to look at internally within your own organizations to see if there are some ways that you can allocate differently and challenge yourself.

Regarding the question relating to partner X having a high admin cost, I'm a bit of a fan of the perspective that organizations do need to invest in themselves a bit to survive. I think you can challenge that and you can question if it's too high and if it's above market rate, but I often feel that nonprofits undersell what we are able to do and some over sell what they can do and when we're looking at a response such as its COVID-19, we want organizations to be taking account of their staff security, their staff safety, and their staff well-being seriously and if we undercut admin and challenge them about how they're taking care of that, it's unfortunately the staff who may bear the brunt of those decisions. So challenge them about what that's for, challenge it to make sure it's going to the places that are protecting their people and making their programs better, but do provide funds they ask for if it makes sense.

**JASON:** **Are you finding that other funders are staying steady, scaling back, or doubling down given both the market and critical needs? How much are you hearing from foundations about their willingness to go beyond—maybe even well beyond—a 5% spending rate?**

**PATTY:** It seems that funders are responding rapidly and generously to support both market and critical needs; to date more than \$3 billion. You can learn more about philanthropic giving on Candid's Coronavirus [page](#). And there appears to be a willingness to go beyond a 5% spending rate because of the recognition that these are extraordinary times.

**JASON:** **How should family foundation boards try to improve family and trustee decision making to better support our grantees and staff during this crisis?**

**ANTONY:** Timely and open communication is critical. Investing in an honest relationship now will help both funders and grantees better navigate the COVID-19 crisis and yield benefits for years to come. Consider what bold steps your foundation can take to offer support. Regarding grantees: Can you release all restrictions from current funding? Give additional, unrestricted support, now? Avoid overburdening nonprofits with applications and reporting requirements. Now is the time to trust nonprofits on the front lines and to challenge status-quo payout rates. Ask, "How can we best fulfill our philanthropic mission during this crisis?"

**DIANA:** Challenge yourself to move funds quickly, making it as easy on nonprofits as possible. Keep proposal and reporting requirements as light as possible. For new grantees, look for opportunities to collaborate with other donors and/or fund intermediaries—streamlining the engagement needed by the nonprofit.

For nonprofits that you really want to help bounce back, make sure they have predictable and flexible funding. In addition to multi-year and core support, also offer seed funding for the future. When nonprofits are responding and adapting to big disruptions like this, there is often a need and opportunity to reinvent aspects of their programming, and this requires money. Targeted capacity building funding can also be critical for helping nonprofits adapt to change.

**JASON:** **Are you finding funders in areas less affected by the virus to be less engaged in problem solving?**

**PATTY:** We have not found that to be true.

**JASON:** **How do you do emergency funding when you've never done it before? In the context of a \$2T federal relief effort, how can funders best deploy grants of \$25K?**

- PATTY:** To do emergency funding, we'd suggest looking at your internal structures to see how you can streamline your processes—both in applications and in getting dollars out the door. This is not to suggest skipping vetting, but particularly with grantees you've worked with before, be nimble so you can be responsive. Also consider collaborating with other funders—perhaps a common application and/or coordinated funding initiatives.
- ANTONY:** We are seeing a lot of need for unrestricted funding. Many nonprofits are being forced to change the way they work, and unrestricted funding will enable them to continue to serve their communities—or at least stay afloat until things start to turn around.
- Half of nonprofits have three months or less cash-on-hand. While some relief money may take time to access, you can provide cash now. Be sure to check in with your grantees so you know how best to serve their needs, but suspend reporting requirements if you can so that they can focus on the work, not the reporting.
- Small community-based organizations led by people of color can especially use your help right now. These organizations have historically been denied access to capital, but targeted grants will help them continue to serve their communities and support their workers through a difficult time.
- JASON:** **What is the best way to respond to health needs in my region which is mostly uninsured? Our family foundation in East Texas has sprung into action to distribute food boxes to our people in need. What would be the best way to help our largely uninsured population with health care needs right now?**
- PATTY:** Fund social service organizations supporting basic needs, those doing distribution to be sure supplies (including PPE and medical equipment) and free clinics with long-term, sustainable funding. Even if you don't usually fund operations, this is a critical time to do so. Donate now with a structure that allows for ongoing (6 months to 1 year) support.
- JASON:** **How do you identify mission-based giving during COVID-19 knowing that priorities have likely changed?**
- PATTY:** In these circumstances, all funders are disaster funders. Priorities may have shifted but issues like education, family well-being, housing, and food security are key to any recovery. COVID will be no different—allow for flexibility in your assessments and be open to funding outside of traditional areas.
- ANTONY:** Given the fluidity of the health and economic crisis, multi-year, unrestricted funding will likely support missions better than any targeted mission-based giving. Nonprofits know best how to serve their communities. Unrestricted funding will allow them to channel resources where they are most needed at this time.
- JASON:** **Have you identified an excellent model for the coordination of case management among social services using excellent software?**
- PATTY:** One example for housing: **Harvey Home Connect (a project of the Greater Houston Community Foundation)**, a common application management system for Hurricane Harvey-impacted homeowners, with a focus on aligning it with existing disaster case management software programs in a more efficient manner.
- NICK:** **Thank you to all of our esteemed panelists for joining us today. And thank you to our community members for their interest in this topic. We encourage you to visit NCFP's COVID-19: Response and Recovery Resources for Giving Families page for up-to-date resources, articles, and family foundation response examples to help you navigate your own response to this crisis. We've also partnered with Giving Compass to create a map of vetted local funds that need your support.**
- NCFP is here to support you during this difficult time. Please contact us to leverage staff's expertise, find relevant resources, or be connected to peers.**

## About NCFP

Established in 1997, the National Center for Family Philanthropy (NCFP) is a catalyst for the greater good; it provides donors and their families with comprehensive resources, expertise, compassionate support and community. We are rooted in the belief that family participation enriches philanthropy and that philanthropy strengthens families. We empower donors and their families to define and pursue their purpose, establish thoughtful policies and practices, and build community to make a positive impact through their giving.

NCFP is a national network of donors and their families, community foundations, and philanthropy serving organizations.

## About the Speakers

**Antony Bugg-Levine** is CEO of the Nonprofit Finance Fund, one of the nation's leading community development financial institutions that makes millions of dollars in loans to nonprofits and pushes for fundamental improvement in how money is given and used in the sector. Prior to this, he co-led the Rockefeller Foundation's program work focused on impact investing – that is developing investment vehicles and supportive infrastructure for the placement of capital into deals that generate both social and environmental impact and financial return. Prior to joining Rockefeller, he served as the Country Director of TechnoServe in Nairobi, Kenya where he helped to design and implement business solutions to rural poverty. In Kenya and Uganda he also worked with various capital providers to develop profitable mechanisms to extend lending to rural businesses. A native of South Africa, he served in the late 1990s as the communications director at the South African Human Rights Commission and as a speechwriter and media strategist for the ANC's 1999 national election campaign.

**Patricia “Patty” McIlreavy** joined the Center for Disaster Philanthropy as its president and CEO in March 2020. Prior to joining CDP, Patty served as the vice president of the humanitarian policy and practice at InterAction. During that time, she led the organization's efforts to assist the humanitarian community, including InterAction Members, U.N. agencies and the Red Cross/Red Crescent Movement, to address the needs of vulnerable populations.

Under her leadership, the Humanitarian Policy and Practice team launched new programs and cultivated new donors including the Swiss Agency for Development and Cooperation, Margaret A. Cargill Philanthropies, Wellspring Philanthropic Fund, the UN High Commissioner for Refugees and the Swedish International Development Cooperation Agency.

**Diana Searce** has dedicated her career to helping social changemakers increase effectiveness and impact, in the US and around the world. Diana's consulting practice focuses on research, developing and evolving strategies and fostering cultures of learning. Prior to working as an independent consultant, Diana was the Director of Learning and Evaluation at the Skoll Global Threats Fund and, before that, Director of Evaluation and Learning at the David and Lucile Packard Foundation. Before entering the foundation world, Diana spent over a decade in consulting, working as a strategist, facilitator, and researcher for social change organizations and initiatives. Diana received her B.A. from Vassar College, her M.A. in religious studies from University of London's SOAS, and her Master of Public Administration from the Harvard Kennedy School.

**Nicholas “Nick” Tedesco** is the President and Chief Executive Officer of the National Center for Family Philanthropy (NCFP).

Prior to joining NCFP, Nick served as a Senior Advisor in the J.P. Morgan Philanthropy Centre where he provided clients with insights and services to help meet their philanthropic goals through innovative advice, thought leadership and opportunities for learning and collaboration.

Previously, Nick served as a Relationship Manager and Program Officer at the Bill & Melinda Gates Foundation, where he helped launch the Giving Pledge—an effort led by Bill and Melinda Gates and Warren Buffett to encourage the world's wealthiest individuals and families to commit the majority of their wealth to philanthropy. In this role, Nick managed relationships with current and prospective members of the pledge, as well as their staff and advisors. He helped to connect global philanthropists with one another in effort to exchange knowledge and encourage collaboration.

**Marcus F. Walton** is President and CEO for Grantmakers for Effective Organizations. He joins GEO with over a decade of practice in both nonprofit management and the ontological learning model. He specializes in operationalizing conceptual frameworks; racial equity facilitation and training; leadership and management strategy; stakeholder engagement; program development and navigating philanthropy.

In his previous role as Director of Racial Equity Initiatives for Borealis Philanthropy, Marcus lead the Racial Equity Initiatives team and worked in partnership with 18 nationally-networked, philanthropy-serving grantee organizations to move past the “transactional” nature of Diversity, Equity and Inclusion to a unified movement which prioritizes strategies that close gaps in access to opportunity, resources and well-being (across all categories of gender, identity, sexual orientation, class and ability).

Before that, Marcus served as Vice President and Chief Operating Officer for the Association of Black Foundation Executives (ABFE), where he oversaw its operations, HR and staff development functions, including the overall strategy, conceptualization and administration of racial equity programming. Prior to ABFE, he combined his organizing experience and passion for public service in the role of Program Officer of Community Responsive Grantmaking with the Cleveland Foundation and Sr. Program Officer with Neighborhood Progress, Inc.

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