



**Get It Right:**



# 5 Shifts

**Philanthropy Must  
Make Toward An  
Equitable Region**

# PREFACE

Northern California<sup>1</sup> harbors some of the most extreme economic inequality in the nation. In 2016, Open Impact's report "[The Giving Code: Silicon Valley Nonprofits and Philanthropy](#)" highlighted a mismatch between the region's astounding wealth and resourcing of community-based organizations, which struggled to meet the most basic needs of lower income folks: safe and stable shelter, sufficient nutritious food, livable wage jobs, and a good education. It turns out the vast majority of Silicon Valley philanthropy was not making its way to local organizations, issues, or communities.

Now five years later, while there are some breakthroughs and bright spots, the philanthropy gap has only grown. The expansion of the global technology sector—and the staggering individual wealth it generates for a disproportionate few—has continued, as has the prosperity paradox the report revealed. The intersecting crises of 2020—a global pandemic, a stark racial reckoning, climate-related wildfires, and threats to our democracy—have illuminated these gaps, with exponential wealth increases for some paralleled by largely preventable destitution and death for far too many. Failing bold, sweeping actions, many community members, including essential workers—childcare and elder care providers, farm and food system workers, service workers, educators, and healthcare workers—will risk deeper entrenchment in poverty even as the region swims in wealth and abundance. We can and must do better for one another.

To chart a course toward a more caring, connected, and equitable region powered by the philanthropy sector, the David and Lucile Packard Foundation supported a unique partnership between Northern California Grantmakers (NCG) and Open Impact. The partnership capitalized on each entity's strengths, combining Open Impact's expertise and research capabilities around donors' impact with the collective wisdom of the 210+ members of Northern California Grantmakers who are committed to effective philanthropic practice and organized, pragmatic action to address complex societal challenges and propel systems change. This paper identifies the shifts decision-makers must make, including philanthropy board members, trustees, and executives, as well as individual donors. It recommends practices advanced by a powerful subset of regional philanthropic leaders,

demonstrating that these strategies, if well-resourced, will transform the lives of individuals and families with low incomes who struggle to realize safety, dignity, and belonging in a region of tremendous wealth.

Open Impact reviewed a wide range of timely, relevant literature and interviewed 23 leaders embodying the vision of creating caring, connected communities of equitable opportunity. The resources and key informants are identified in the appendix. The leaders who shaped these findings and recommendations made the case for radical change.

If we want to transform our region, philanthropy needs to fortify its vision, boost its ambitions, and update the way the sector operates. We must urgently confront existential challenges—dramatic income and racial disparities, convergent large-scale climate disasters, and woefully inadequate housing and infrastructure—with a coordinated yet long-term response that eliminates inequitable structures, policies, and practices to generate opportunity, safety, healing, and new possibilities for those currently living on the margins.

As a hub for philanthropic learning and action, NCG pledges to lead the way forward. NCG will champion these practices with programs and resources that better equip philanthropy's decision-makers to forge a path from the inequitable status quo toward a region where everyone belongs and flourishes. Join us!

**“Philanthropy needs to match the courage of the movement builders and organizers.” — Rajasvini Bhansali, Executive Director, Solidaire Network**

<sup>1</sup> For the purposes of this report, we define Northern California as the northernmost 48 counties in California, including the 9-county San Francisco Bay Area, the Greater Sacramento area, and the Metropolitan Fresno area.

# ACKNOWLEDGEMENTS

The authors thank the Bay Area philanthropic leaders who helped develop the framework and provided guidance and feedback on the report's direction. The ideas and practices outlined result from their incredible generosity of thought and collaboration.

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This report would not have been possible without the collaboration of the following organizations.

**NORTHERN CALIFORNIA GRANTMAKERS** (NCG) led action planning for the report. NCG advised on research and development, identifying voices in philanthropy at the leading edge of practice. NCG leaders Dwayne S. Marsh, Steve Barton, and Phuong Quach joined Open Impact for sensemaking sessions around the findings and helped hone the five-point framework and key messages, offering deep expertise on philanthropy, racial equity, and sector change. NCG also devoted significant time from its May 2021 annual conference to present key findings and the draft framework and help gather additional input and ideas, which deepened the insights presented in this report considerably. Teammate Emily Katz provided guidance throughout. NCG's team designed, published, and launched the final report.

**THE DAVID AND LUCILE PACKARD FOUNDATION** works with partners locally and around the world for social, cultural, and environmental change designed to improve the lives of children, families, and communities. Based in Los Altos, CA, the Foundation is a longtime leader in exploring issues related to community-based giving. The Foundation provided steady support for Open Impact's work on regional and local giving, starting with partnership on The Giving Code report in 2016 and continuing up to this report. Irene Wong, the Foundation's Director for Local Grantmaking, was a key thought partner and encouraging in her support every step of the way.

**OPEN IMPACT**, a philanthropic advisory firm, led the research and writing of this article. Kate Wilkinson and Kat Vang co-designed the research approach, combed the literature, and conducted the interviews. Teammates Heather McLeod Grant and Alexa Cortes Culwell joined them in distilling the insights and developing an initial framework. Heather led the development of this article, writing in collaboration with Mickey Butts, who also provided valuable editorial support throughout.

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# A TALE OF TWO REGIONS

Though the COVID-19 pandemic upended life in Northern California, the region continues to be an engine of unparalleled economic growth. The market capitalization of companies in Silicon Valley and San Francisco reached \$10.5 trillion in 2020, a 37% increase in one year.<sup>2</sup> Nearly half of all U.S.-based unicorns (private companies valued at more than \$1 billion) and three-quarters of decacorns (private companies valued at more than \$10 billion) are headquartered here.<sup>3</sup> In the past five years, the number of local millionaires doubled, reaching 148,000 in Silicon Valley alone.<sup>4</sup> In parallel, housing prices soared, increasing as much as 25% in some neighborhoods.<sup>5</sup>

While local wealth<sup>6</sup> has snowballed, inequality has exploded even faster. The Bay Area has become among the most economically inequitable places in America; just 16% of families own 81% of the region's wealth. The repercussions of this inequity are staggering. Nearly a half-million local residents lost their jobs as the result of pandemic shutdowns.<sup>7</sup> Regional unemployment nearly tripled in 2020, reaching 14%—higher than during the dot-com bust of 2001 or the Great Recession of 2008.<sup>8</sup>

Because structural racism is embedded in nearly every aspect of society, income inequality and poverty continue to have a disproportionate impact on people of color in the Bay Area. Black and Latinx workers are much more likely to have low-wage jobs due to past and present policies, and they have filed for unemployment at twice the rate of white workers, with service-sector joblessness exceeding 40% during the pandemic.<sup>9</sup> Certain ethnic subgroups like Hmong,<sup>10</sup> Burmese,<sup>11</sup> and Laotians<sup>12</sup> continue to earn much less than other Asian American and Pacific Islander (AAPI) groups. Low-income residents faced record rates of food insecurity, with more than 1.5 million people waiting in long lines at local food banks<sup>13</sup> and this doubling of previous levels of hunger is predicted to linger for years.<sup>14</sup> The number of people without housing rose by 25%—the third highest rate in the country.<sup>15</sup> Bay Area rents remain at 73% of the median income of service workers,<sup>16</sup> far beyond the 30% recommended by U.S. Housing and Urban

Development.

Predictably, COVID-19 only widened the chasm between those with accumulated wealth and those who have been shut out of the economy. It also laid bare persistent racial, class, and gender inequalities. “We used to lament that in Silicon Valley the rich kept getting richer while the poor became poorer,” says Russell Hancock, president and CEO of [Joint Venture Silicon Valley](#). “Today we must frankly admit that the pandemic has made the rich richer while the poor are dying.”

The pandemic exacerbated problems that have afflicted Northern California for decades, perpetuated by a long history of inadequate affordable housing, hiring and pay discrimination, educational and childcare gaps, racial and gender violence, punitive immigration policies, fragmented transportation systems, and gentrification of low-income neighborhoods.

“Wealth gaps reflect the sedimentation of racial disadvantage and exclusionary policies across generations.” —*Taking Count Report from Tipping Point Community and UC Berkeley's Othering & Belonging Institute*<sup>16</sup>

As the “[Taking Count](#)” report from [Tipping Point Community](#) and [UC Berkeley's Othering & Belonging Institute](#) concluded, “Wealth gaps reflect the sedimentation of racial disadvantage and exclusionary policies across generations.”<sup>17</sup>

The region's problems are not unique, though they are in many ways more extreme and pronounced here. Despite Northern California's long history of breakthrough innovations and the concerted effort of regional philanthropies with phenomenal wealth, networks, and knowledge, the region continues to face numerous intractable problems. If the philanthropic sector neglects these, it will squander an important opportunity to build a region where everyone flourishes.

<sup>2</sup> “2021 Silicon Valley Index”, Joint Venture Silicon Valley, February 16, 2021.

<sup>3</sup> Ibid

<sup>4</sup> Ibid

<sup>5</sup> Louis Hansen, “Bay Area home prices soar on suburban land rush”, The Mercury News, April 5, 2021.

<sup>6</sup> “2021 Silicon Valley Index”, Joint Venture Silicon Valley, February 16, 2021.

<sup>7</sup> George Avolos, “Bay Area loses half-million jobs in April, California 2.3 million. Here are the hardest-hit industries”, The Mercury News, May 22, 2021.

<sup>8</sup> “FRED Economic Data”, Federal Reserve Bank of St. Louis.

<sup>9</sup> “2021 Silicon Valley Index”, Joint Venture Silicon Valley, February 16, 2021.

<sup>10</sup> Abby Budiman, “Hmong in the U.S. Fact Sheet”, Pew Research Center, April 29, 2021.

<sup>11</sup> Abby Budiman, “Burmese in the U.S. Fact Sheet”, Pew Research Center, April 29, 2021.

<sup>12</sup> Abby Budiman, “Laotians in the U.S. Fact Sheet”, Pew Research Center, April 29, 2021.

<sup>13</sup> Leslie Bacho, Suzan Bateson, and Joel Sjostrom, “Opinion: Bay Area food bank numbers tell a sobering story”, The Mercury News, December 23, 2020.

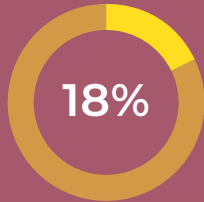
<sup>14</sup> Carolyn Said, Food Bank of Contra Costa and Solano, “There is no vaccine for hunger: Bay Area demand for food help remains high”, San Francisco Chronicle, July 12, 2021.

<sup>15</sup> Kevin Fagan, “Cautious Hope as Calamity Looms”, San Francisco Chronicle, July 6, 2020.

<sup>16</sup> 2021 Silicon Valley Index, Joint Venture Silicon Valley, February 16, 2021.

<sup>17</sup> Daniel Schneider, Benjamin Bowyer, Jacob Leos-Urbel, and Jamie Austin, “Taking Count: Poverty, Insecurity, and Privilege in the Bay Area”, Tipping Point Community and UC Berkeley's Othering & Belonging Institute, July 30, 2020.

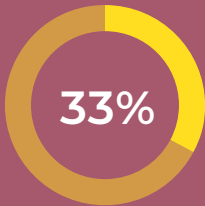
# Bay Area Inequality by the Numbers



of employed Latinx immigrants live below the poverty line<sup>18</sup>

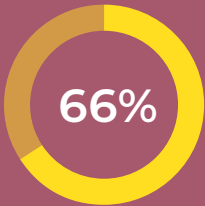


Nearly 1 in 4 Black and Native American residents live in poverty<sup>23</sup>



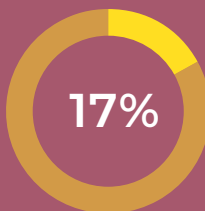
of all women of color work in essential industries<sup>19</sup>

**1.3 million** Bay Area residents have less than **\$400** in savings<sup>24</sup>



of essential workers are Black, Indigenous, and people of color<sup>20</sup>

Median studio rent **\$25,800**  
Pretax median wage **\$35,241**



of all essential workers live below the poverty line<sup>21</sup>

The annual rent for a studio apartment was \$25,800; service workers earned a pretax median wage of \$35,241 annually<sup>25</sup>



**\$7.8 billion** ➤ **\$26 billion**  
Bay Area student loan debt tripled from \$7.8 billion to \$26 billion over the last 15 years<sup>22</sup>



The top 10% of Bay Area earners make 8x more than the bottom 10%<sup>26</sup>

<sup>18</sup> Ibid

<sup>19</sup> Ibid

<sup>20</sup> Jamila Henderson, A Profile of Frontline Workers in the Bay Area, Bay Area Equity Atlas, May 13, 2020.

<sup>21</sup> 2021 Silicon Valley Index, Joint Venture Silicon Valley, February 16, 2021.

<sup>22</sup> Bina Patel Shrimali, "At What Cost? Student Loan Debt in the Bay Area", San Francisco Office of Financial Empowerment and Federal Reserve Bank of San Francisco, April 2019.

<sup>23</sup> "An Equity Profile of the Nine-County San Francisco Bay Area Region", National

Equity Atlas, 2017.

<sup>24</sup> Daniel Schneider, Benjamin Bowyer, Jacob Leos-Urbel, and Jamie Austin, "Taking Count: Poverty, Insecurity, and Privilege in the Bay Area", Tipping Point Community and UC Berkeley's Othering & Belonging Institute, July 30, 2020.

<sup>25</sup> 2021 Silicon Valley Index, Joint Venture Silicon Valley, February 16, 2021.

<sup>26</sup> Sarah Bohn, and Tess Thorman, "Income Inequality in California", Public Policy Institute of California, January 2020.

# Local Philanthropy Has Leaders to Follow

Philanthropy is often thought of as “society’s risk capital.” Donors enjoy the benefits of both government and markets, combining a tax-subsidized focus on the public good with the freedom, flexibility, and innovation of the private sector. However, mainstream philanthropy’s operating model needs a serious upgrade. As Stanford academic Rob Reich, author of *Just Giving*, observes, “Despite their freedom and generous tax advantages to stimulate their activity, philanthropists of this generation are more timid than bold. The technological geniuses of Silicon Valley who dreamt up the digital revolution somehow trimmed their sails when it came to their philanthropy.” Reich calls for a big-picture idea for today’s philanthropy equivalent to the new universities and civic infrastructure that grew out of the first Gilded Age.

Foundations and donors with a strong tie to a place have a unique opportunity to support long-term regional transformation. In Northern California, 4,310 regional philanthropies have assets of more than \$177 billion.<sup>27</sup> Nationally, donor-advised fund assets doubled in the past 5 years to \$141 billion in 2020.<sup>28</sup> Collectively, however, we heard repeatedly from communities suffering the negative consequences of inequities that philanthropic giving levels and practices do not match the depth and complexity of the region’s challenges.

“The disparities in our region are huge, driven by systemic racism and racist practices embedded in our structures. These disparities took centuries to create and they are not going away in three years.”  
—Elena Chávez Quezada, formerly at [San Francisco Foundation](#)

The systemic inequities behind today’s challenges demand that philanthropy reconceive its relationship to time itself. Funders must simultaneously hold the long view in transforming systems, shifting their posture and approach in ways that acknowledge scale, while acting with

urgency to meet basic needs and set in motion larger-scale changes. The changes needed require both of these.

The magnitude of problems facing the region calls for a radical rethinking of philanthropy’s catalytic role in local and regional problem-solving. Donors have amassed enormous capital. Billions of dollars held in donor-advised funds and foundation endowments can immediately fuel changes that not only close gaps but set generational shifts in well-being in motion. Philanthropic leaders’ relational assets—trust built with local decision-makers, policymakers, community leaders, and nonprofits—coupled with robust financial assets can support risk-taking and enliven bold approaches with the potential to generate greater impact.

“In a crisis, philanthropy needs to do two things at once: take care of and invest in its core organizations and build for the future by taking risks and investing in new organizations and new types of leaders.” —Sam Cobbs, Tipping Point Community

<sup>27</sup> “Bay Area Foundation Overview,” Foundation Center, 2018.

<sup>28</sup> “The 2020 DAF Report,” National Philanthropic Trust, 2020.



# Five Shifts for Greater Impact

This is a time for bold vision and action. Northern California donors and institutions can align resources and propel changes that close racialized wealth gaps and establish conditions for regional vibrancy and communal well-being. Funders can start by embracing and using the innovative practices in this report. Emergent from research and distilled by experienced philanthropic practitioners working in solidarity with local communities, many of these strategies are not new. However, they have yet to be broadly adopted due to entrenched practices, status quo mindsets, and widespread inertia in the philanthropic sector. We can no longer afford inaction. We must pursue what evidence indicates as the path toward equitable recovery and shared prosperity.

Ultimately, philanthropists must rethink their approach to power, shifting from transactional to transformational giving that benefits from the wisdom, voice, and experience of local communities. We offer five shifts as a framework for deep-seated change.

## FROM

## TO

### DONOR-CENTERED

Decisions driven by boards/trustees, often white, wealthy, and lacking depth of understanding of systemic racism and interlocking dynamics that sustain economic and social inequalities facing our region.

### COMMUNITY-CENTERED

Decision-makers involve those closest to problems, engage diverse communities in governance, and apply a strong racial justice frame of analysis/decision-making.

### FOCUSED ON SYMPTOMS

Narrow, single-issue problem definitions that lead to short-term, surface-level solutions.

### FOCUS ON SYSTEMS

Holistic approach focused on underlying root causes alongside direct services.

### INDIVIDUAL ACTION

Funders act in isolation, each following their own (siloeed) strategy and approach, with limited understanding of the benefit of aligning their actions as part of a complex ecosystem.

### COLLECTIVE ACTION

Funders collaborate to develop robust collective strategies and approaches, actively working in concert with those driving change in other sectors.

### LIMITED CAPITAL INVESTMENT

The amount of philanthropic capital invested is too small for the scale of problems and funders frequently do not use their influence to unleash additional sources of capital from other sectors.

### LEVERAGE CAPITAL INVESTMENT

Funders are realistic about the scale of the problem, understand the catalytic and risk-capital role of philanthropic dollars, and organize diverse capital sources, including their endowments, resources of peer foundations, the private sector, and government.

### OUTDATED PRACTICES

Funders do not model the performance they expect of their grantees; grantmaking practices are not trust-based and feature onerous reporting requirements; funders display a limited sense of urgency in making grants.

### UPDATE PRACTICES

Internal funder practices center on diversity, equity, and inclusion (DEI); funders follow trust-based and inclusive grantmaking practices; they demonstrate urgency while deploying funds, with an understanding of long-term systems change.

# 1. Center equity rather than your experience

“You’re not going to get where you want with your giving to transform this region by listening to your peers alone. Our work has to emerge from community.”  
—Caitlin Brune, Senior Fellow, Northern California Grantmakers

Funders—especially trustees—are most often white, wealthy, and privileged.<sup>29</sup> Even among place-based philanthropies with long legacies of local giving, many funders operate with insufficiently tested assumptions about the lived realities of their poor and working-class neighbors, including the impact of systemic racism and discrimination.

Local leaders we interviewed called for a dramatic reduction in top-down grantmaking strategies. Sabrina Wu, a senior program officer at the [East Bay Community Foundation](#), inquired: “What is this moment calling us to do? The role of transformation really lies with the community organizations that have been doing this work for a long time. Philanthropy is many layers removed from the solutions—its role should be to raise and mobilize resources.

At its best, philanthropic giving should address the inequitable impacts on people of color from climate change, healthcare disparities, economic instability, and education gaps. Racial disparities stem from dysfunctional policies. Funders keen to close gaps in well-being outcomes must apply a racial equity analysis to problems and welcome community leadership in crafting and implementing solutions, i.e., they must share power. “The theory of change should sit with the groups most proximate to the problem,” says Justin Steele, director of [Google.org](#). “We are just a funding partner, trying to get out of nonprofits’ way and letting them figure things out.”

“In the Bay Area, our privilege and our language put on blinders that limit the creativity and solution sets we can leverage,” says Crystal Hayling, executive director of [The Libra Foundation](#). “If philanthropy wants to have urgency in our work and clarity of view, we have to turn over decision-making to others to help us see more clearly.” Ideally, this means including Black, Indigenous, and people of color (BIPOC) leaders at all levels of decision-making: on the foundation board, on staff, in advisory councils with real influence over decision-making, and through participatory grantmaking approaches.

In 2020, the [Silicon Valley Community Foundation](#) (SVCF) appointed a [Community Advisory Council](#) of 24 local leaders to advise the foundation on local grantmaking strategies, identify emerging leaders, and “provide frank feedback on whether we are authentically there for our community and following their lead,” according to Gina Dalma, executive vice president of community action, policy, and strategy. “There has been such disinvestment in the BIPOC community and leaders that we need to invest in building the ecosystem first, if we want to show real impact.” Accordingly, to promote lasting change that resolves inequities, philanthropy must also invest in historically underfunded BIPOC-serving and BIPOC-led nonprofits.

Additionally, to address the scale of systemic inequities, philanthropy must provide resources for coordination and collaboration among community nonprofits. “The Foundation uses an incredibly consultative model, bringing in community leaders to learn from them, hear what they are grappling with, and then build an agenda together,” says Chávez of San Francisco Foundation, which compensates community leaders who contribute their insights and recommendations.

<sup>29</sup> Phil Buchanan, “The Imperative of Foundation Board Diversity,” The Center for Effective Philanthropy, January 19, 2021.

## 1. Center equity rather than your experience

### Case Study: The Castellano Family Foundation Creates a Blueprint for Change

Latinx communities comprise more than one-quarter of the Bay Area population.

When compared to their white counterparts, this growing demographic of Californians experiences widening disparities in income, education, health, and housing. These gaps are exacerbated

by longstanding and persistent lack of access to philanthropic dollars among Latinx nonprofit leaders and Latinx-focused organizations.

Barely 2% of private foundation CEOs are of Latinx heritage. Latinx

groups receive approximately 1% of all philanthropic investment,<sup>30</sup> a proportion that has not changed since data gathering began decades ago.

[The Castellano Family Foundation's](#) (CFF's) bold vision for closing this gap has spurred local philanthropies to invest more in Latinx-led nonprofits. CFF's [Blueprint for Change](#) provided the field with a data-backed understanding

of the funding gap while articulating the business case for investing in Latinx-led groups. CFF and Silicon Valley Community Foundation created the [LatinXCEL Fund](#) with the goal of aggregating \$10 million over three years to support Santa Clara and San Mateo

county-based Latinx nonprofits advancing equity and social justice through advocacy and movement-building.

Armando Ramon Castellano, a CFF trustee, used his connections to encourage

other donors to invest in the fund. In mobilizing peer funders, he suggests: "Give first, then learn, then give more." This recommendation came from [Grove Foundation](#) Chair Karen Grove, a white ally who has openly embraced DEI to transform her foundation. Castellano advocates leveraging white allies' support but then "making the decisions ourselves, coming to the solutions ourselves, and funding them."

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“Talk less. Listen more. Be more vulnerable and open-hearted. Share power with the communities you're in service to.” —Armando Ramon Castellano, Trustee, Castellano Family Foundation

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<sup>30</sup>"Blueprint for Change," Castellano Family Foundation, 2020.

## 2. Emphasize systems rather than symptoms

While there has been progress, donors do not yet consistently reckon with the systemic nature of the complex, intersecting dynamics of race and class and how these affect people's lived experiences with housing, criminal justice, education, employment, the environment, and transportation. Indeed, interviewees affirmed that funders' preference for narrow problem statements leads to siloed approaches and missed opportunities for more coordinated, cross-sector action. Meeting people's basic needs is crucial. Interrupting and resolving inequities, however, requires "sustained practices that can penetrate systems like education and criminal justice," says Lateefah Simon, president of the [Akonadi Foundation](#). "We won't create a more equitable region until we are clear about the problems and how we can begin solving them, which also requires a focus on policy," she says. Philanthropies must connect the dots between larger forces that include capital flows, government regulations, and state or local policies, including the powerful role 501(c)(4) activities can play.

**“What we are trying to do is inspire outcomes that are not dependent on altruism. We need a focus on policy and warm bellies.” –Lateefah Simon, President, Akonadi Foundation**

With trillions in collective spending, governments and private markets are critical contributors to resolving complex problems. Place-based philanthropy can assert leadership through innovation and experimentation that nudges government and the private sector to act. Philanthropies can catalyze new market-based solutions and fund the advocacy, movement building, and policy solutions essential to resolve

major regional issues. "Philanthropy must be willing to make the continuous case for supporting local government, be a convener for catalytic actions, and leverage its capital," says Rodney Foxworth, CEO of [Common Future](#).

Leading philanthropies can not only invest mightily in local problem solving; they must also routinely widen their gaze and ascertain the broader implications of the interconnected nature of the region's problems, toggling between grassroots perspectives and policy-level solutions. "We are seeing more and more direct service organizations moving into advocacy and organizing in order to scale adoption of policies and practices that could support a new economy and community," says Sam Cobbs of Tipping Point Community. "Funders must come alongside them as they do this work and fund the intersection between advocacy and direct impact."

The San Francisco Foundation, [SPUR](#), the [Bay Area Council](#), and Silicon Valley Community Foundation, among others, have already outlined what's needed to tackle challenges at a regional level. Many of these plans are underfunded or sitting on shelves awaiting support for implementation because funders frequently don't know how to find "shovel ready" projects.

Funders in Los Angeles recently articulated a shared regional agenda, described in the ["No Going Back"](#) report as a "stark moral charge to repair an unequal society." The cross-sector group involved in preparing the "No Going Back" report calculates that more than \$300 billion in annual economic output is lost in Los Angeles every year due to systemic racial disparities. A similar cross-sector equity-focused analysis could generate a common regional agenda for the greater Bay Area.

## 2. Emphasize systems rather than symptoms

### Case Study: Sobrato Philanthropies Champions English Language Learners in California

California's 1.1 million English language learners comprise 19% of the state's total K-12 student body in the state, the largest population of its kind in the country. In

addition, nearly 60% of children ages five and under in California live in homes where a language other than English is spoken.<sup>31</sup> When they are little, these children bring a wealth of assets entering into the K-12 system with the ability to speak multiple languages. However, once in the K-12 system, they are seen as having deep deficits and are

often offered insufficient supports to achieve their potential especially as they learn the English language alongside math, reading, science, and social studies curricula. These young people are twice as likely to come from low-income families and are more likely to drop out of school than their native English-speaking peers. Nearly half of California English language learners who enroll in kindergarten are likely to become "long-term English language learners," students for whom gaps accumulate as they move through school, with proficiency out of reach.

To address this problem and uplift the assets of this population, in the Bay Area, Sobrato Philanthropies launched

a preschool and elementary program, [Sobrato Early Academic Language \(SEAL\)](#), in 2008 in San Jose and Redwood City schools. SEAL provides professional development, curriculum support, and technical assistance for teachers of English language learners. External

evaluations proved SEAL's profound impact, spurring expansion and replication of the model Bay Area-wide and then across the state. SEAL has since spun off to be its own independent organization

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“We are targeting statewide policy change to move English learners from the margins to the center in education policy,” says Doua Thor, director of the English Learner Initiative of Sobrato Philanthropies.

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continuing this work. Expanding beyond this initial program, Sobrato Philanthropies also partners with policy advocates, researchers, student and family engagement groups, and other foundations to take the lessons from SEAL and to support English language learners throughout the State. Acting as a grantmaker and convenor, Sobrato Philanthropies activated a donor collaborative, welcoming other funders to co-invest in advancing equitable opportunities and outcomes for English learner students. Sobrato Philanthropies also worked to raise awareness about policies that generate more resources for schools to serve their English language learners.

<sup>31</sup> "Dual Language Learners," Early Edge California.

# 3. Choose collective over individual action

“*Collaboration is the next step past ‘give more’ — it requires much more from donors in terms of flexibility, responsiveness, transparency, sharing power and letting go of ownership.*”  
—*Jackie Downing, Founding Executive Director, [Crankstart Foundation](#)*

Over the past decade, the social sector emphasized the necessity of collaboration in service of effective change-making. Models for collective impact forge a common vision and goals, encouraging aligned actions among philanthropy, nonprofits, government, and business; shared data, measurement, and intentional learning; and using a single organization to provide ongoing coordination.

Despite this trend, however, philanthropies—whether large foundations or individual donors—too often continue to direct their resources where they believe they alone can “make a difference.” They create their own theories of change, strategies, and agendas rather than collaborating to shape shared agendas, build power with others, and contribute to collective efforts to shift larger structures and practices. In Northern California, philanthropy’s siloed approaches are exacerbated by a fragmented ecosystem populated by hundreds of local government entities, educational institutions, regulatory entities, and nonprofits, further complicating efforts at coordinated action.

A stand-apart, competitive mindset often fuels success in business. It doesn’t translate well, however, when collective action is necessary to drive large-scale change. Individualistic frameworks contribute to a fragmented social sector comprising hundreds of foundations deploying billions of dollars to thousands of nonprofits, mostly without concerted effective attention to addressing

root causes. “We are glad to be part of a new wave of collaborative giving that is focused on listening and following the leadership of others, especially people of color and those closest to the issues we want to address,” says Catherine Crystal Foster, former CEO of [Magnify Community](#), an initiative funded by a collaborative of 6 foundations, that champions greater, bolder, and more equitable giving to community-based organizations focused on local needs in Silicon Valley.

Investing in pooled funds and donor collaboratives can accelerate change and amplify impact of dollars. It can also satisfy a craving for community, according to Crystal Foster. “Principals and their staff want to know what the other is doing and they want to learn from one another. There’s a strong role for intermediaries in introducing and connecting donors to support collaboration.” Intermediary organizations, such as Northern California Grantmakers (NCG) or the San Francisco Foundation (SFF), serve as platforms for more coordinated action while illuminating promising strategies that might benefit from deeper investment. NCG mobilizes funders to respond collectively and promote disaster resilience, address nonprofit displacement, and ensure the vitality of the regional arts sector, among other collaborative efforts. In doing so, NCG uses racial equity as an organizing principle, lending strength to individual foundations’ efforts when this is underdeveloped or lacking. SFF provides coordination capacity for the [HopeSF](#) initiative, the [Partnership for the Bay’s Future](#), [Great Communities Collaborative](#), and [ReWork the Bay](#). SFF funded and led the creation of the seminal [Bay Area Equity Atlas](#) to track the state of racial and economic equity across the region and inform solutions for inclusive prosperity. “Our work at HopeSF seeks to put residents at the center,” says Chávez, formerly of the San Francisco Foundation. “It takes time, patience, and resources, but as a result it is more holistic and community-informed, and residents are the ones leading the change.”



### 3. Choose collective over individual action

## Case Study: Akonadi Foundation Builds Black Movements

When MacArthur Fellow Lateefah Simon joined the Oakland-based [Akonadi Foundation](#) as president in 2016, she realized the organization lacked a complete picture of what was happening in the communities it served. Despite long-term, year-over-year commitments to select nonprofits, the foundation was not investing enough in key neighborhoods that were experiencing high rates of violence, unemployment, and gentrification that resulted in displacement of longtime residents.

Additionally, the Foundation lacked

mechanisms for gathering community input or feedback: “We were a black box,” Simon acknowledged. She began holding daily “office hours” for community leaders and grantees to meet her for lunch at a nearby restaurant, and soon discovered that nine local family foundations were not coordinating with each other or with the community. “We were all making funding decisions without an analysis of the city’s [social justice] movement infrastructure.

Our subsequent analysis allowed us to coordinate with other funders and to move money to where the resources were most needed.” The Foundation began to focus on unemployment among formerly incarcerated Black men, the criminalization of youth of color, and policing in Oakland public schools while providing funding for emerging opportunities that responded to what community leaders said was needed.

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“If you are at the forefront, be the first in, be the convenor, be the ambassador for collaboration.” —Lateefah Simon, President, Akonadi Foundation

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With \$3.5 million in annual giving, Akonadi Foundation is tiny relative to regional philanthropies—and yet it punches well above its weight. “We want to work as if we were running a \$200 million foundation,” Simon says. To magnify the Foundation’s efforts to address systemic racism, Simon collaborated with five other foundations,

aggregating millions to fund local organizing and supporting legal, research, technical assistance, polling, and data needs that were not being funded. On the recommendation of its current grantees, Akonadi and its

partner foundations also made five-year grants of more than \$1 million to five organizations leading the region toward inclusive prosperity and safety for all.

“We activate our funder networks and other donors to fund the things we believe are critical but that we can’t fund,” says Simon. Each staff member at Akonadi has a “leveraging goal.” For example, Simon worked with colleagues to catalyze the launch of the [California Black Freedom Fund](#) (CBFF), managed by Silicon Valley Community Foundation, partnering with nearly 20 foundations to raise \$100 million to fund Black-led organizations working to eradicate systemic and institutional racism by enhancing grassroots power in Black and Brown communities.

## 4. Leverage capital to scale the issue

Foundations and donors frequently tinker around the edges of billion-dollar issues with grants that fail to address either the timeframe for, or true cost of, structural change. Ultra-wealthy donors simply do not give enough, donating an average of just 1% of their total assets, according to Bridgespan.<sup>32</sup> [Giving Pledge](#) families—including many billionaire donors in Northern California—would need to donate at exponentially higher rates than their current levels to give away half their wealth in their lifetimes. Importantly, many donors give mostly to institutions they know, such as hospitals, universities, and private schools, and not to groups focused on social transformation of existing inequities. And many donors tend to think in annual grant cycles, rather than investing for the longer timeframes needed.

“Many donors fail to recognize the ongoing underinvestment in community-based organizations, particularly those led by people of color, which creates a starvation cycle and limits impact,” says Crankstart Foundation’s Jackie Downing. “It becomes a self-fulfilling prophecy: nonprofits don’t have the resources to create large-scale change because they’re perceived as too small to fund at scale.” Downing says that nonprofits and funders often set budgets and grant sizes based on available resources, instead of estimating how much time and resources it will take to actually solve a problem. She wants to reverse this, instead asking: “How much will it take to solve this problem? Which community leaders are best positioned to lead the change? How can we invest in them generously and over time to grow their capacity to solve problems at scale?”

After a heartbreaking year, now is the time for donors to inject much more capital into transforming our region, bringing the boldness they’ve used to launch and build their companies and wealth into their philanthropy. “This is a unique moment in time, and funders are finally willing to listen,” says A. Sparks, CEO of the [Masto Foundation](#), the legacy foundation of a Japanese American family who experienced internment during World War II. “Funders are seeing the suffering

that has always existed but that was hidden from philanthropy’s isolated and limited vantage point. And they are connecting the dots to the systems and the movement building that will be necessary to make change.”

Connecting the dots means marshaling all of the assets of Northern California foundations and donors: invested assets (including endowments and impact investing funds), philanthropic assets (including donor-advised funds and grants), social capital, and real estate. Data indicates that 95% of institutional foundation assets are not deployed toward impact; they’re mostly awaiting disbursement from endowments, with an IRS-mandated payout rate of 5% annually. “Now is the time to step up and free up resources to communities and people in need,” says Sabrina Wu of the East Bay Community Foundation. “We should be leveraging more integrated capital strategies to achieve social goals, using our investment capital, grant capital, and mission-related investments, as well as examining how assets are invested and working toward greater mission alignment.”

Donors can re-imagine the magnitude of their commitments: from wealth preservation to capital activation. Kat Taylor uses this approach to deploy philanthropic capital through multiple instruments—foundations, a B Corp, mission-related investing, land and desirable infrastructure—while also working with Taj James of [Full Spectrum Capital Partners](#) to shift more of her total wealth to community ownership.

Finally, philanthropies can function as “risk capital.” Rather than exclusively playing it safe, donors can redefine risk. Currently many innovations and programs are not seriously considered only because potential community partners and their assets are not well-known to philanthropy. Philanthropy can seed a new set of changemakers by unlocking significant capital for new organizations and emergent, innovative ideas and approaches.

<sup>32</sup> Susan Wolf Dtkoff, Alison Powell, Kyle Gardner, Tom Tierney, “Four Pathways to Greater Giving,” The Bridgespan Group, November 2018.



## 4. Leverage capital to scale the issue

# Case Study: Pooled Funds and Donor Collaboratives Amplify Giving

*The Giving Code* revealed a host of barriers to significant local giving. Place-based donors often don't know where to start giving, nor how to give in amounts and over timeframes that support meaningful and durable change. Donors often find the local nonprofit ecosystem difficult to navigate, don't have direct knowledge of local communities, and struggle to comprehend social issues, including systemic racism, that have long histories and multiple interacting root causes.

Donor collaboratives encourage donors to give while learning from their peers or issue leaders and outsourcing the expertise, management, and grantmaking to experienced intermediary organizations. Further, donor collaboratives can aggregate significant capital, opening up the potential to address issues at a much larger scale.

Place-based pooled funds are growing in number in Northern California. Regional examples include giving circles managed by the Latino Community Foundation, Tipping Point's Impact Through Equity

strategy, San Francisco Foundation's [Bay Area Leads Fund](#) and [Rapid Response Fund](#), Community Foundation of Santa Cruz County's [Rise Together](#) initiative,

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“We work from the margins to the center rather than the center to the margins. We focus our grantmaking on those least listened to and empower them to use their voice and build their capacity for their priorities.”  
—Crystal Hayling, CEO, Libra Foundation

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and the California Black Freedom Fund managed by Silicon Valley Community Foundation. “These funds know how to review and assess organizations and strategies based on deep community knowledge,” says Crystal Hayling of the Libra

Foundation. She recommends that local donors support regranteeing funds led by Black, Indigenous, and people of color leaders. “They provide donor education as part of their work.”

Libra launched the [Democracy Frontlines Fund](#), a pooled, \$36 million fund consisting of multiple foundations and individual donors that engages BIPOC community leaders to develop a national portfolio of BIPOC-led nonprofit grantees. Donors participate in four learning sessions a year and take a back seat in decision making, relying instead on community leaders' expertise to guide funding decisions. This national model for pooled funding/donor collaboration could be replicated locally.

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WHO BELONG

# 5. Update outdated grantmaking practices

“BIPOC-led nonprofits also often don't speak the same language or use the same frameworks as philanthropies, and translating their work can take up too much of their time. It's the role of the funder to bridge that gap.”  
 –Armando Ramon Castellano, Trustee, Castellano Family Foundation

Paradoxically, by changing how they do business internally, funders can hasten progress toward solving regional problems. Leaders we interviewed reported that local philanthropy moves too slowly and is overly academic, bureaucratic, and risk averse. Funders frequently spend more time researching problems than acting. They focus on activities and outputs rather than contributing to the deeper structural changes needed to make a substantive difference in the lives of those who are suffering. Individual donors often lack the patience and discipline to distribute resources at the level and pace needed. “It's unacceptable that foundations are so slow,” says Simon of the Akonadi Foundation. “Our sector is the least accountable—we don't make decisions; we just keep meeting and talking, while nonprofits and communities struggle.”

The power dynamics inside an organization can lead to a disconnect between a philanthropy's values, the way the organization operates, and the outcomes of its decisions and actions. Effective grantmakers are currently engaged in challenging conversations around racial equity within their own organizations. A serious commitment to learn, reflect, reckon, heal, and repair—as a staff and board—can establish an institution sufficiently grounded to confront the systemic challenges identified throughout this article. Funders should more fully resource staff and leadership with additional expertise to create internal practices and policies that sustain the organization's commitment. “Be conscious of asking people of color to hold all of this work,” says Doua Thor of Sobrato Philanthropies. “Provide support and resources to ensure they can manage to desired

outcomes.” Donors can assess their foundations and define next steps around equity using myriad resources generated in recent years, including National Committee of Responsive Philanthropy's [Power Moves](#); Donors of Color Network's [Inclusion Principles](#); and Philanthropic Initiative for Racial Equity's [“Grantmaking with a Racial Equity Lens.”](#)

According to Sparks of the Masto Foundation, hiring staff with diverse lived experiences from a variety of ethnic/cultural backgrounds spurs innovation and impact: “The culture of foundations is disconnected from the community because of a homogeneity of mindsets, language, connections, and networks. No creativity is possible because everyone went to the same Ivy League school, learned from the same folks, and came out of the same world.”

Addressing the dearth of BIPOC leaders guiding foundations is a start, but solutions must go beyond simply hiring more staff of color. “It can't just be about hiring people of color to show that we have diversity,” says Doua Thor. “You need to hire and empower people who have the lived experience of and are connected to the communities you are seeking to serve,” while also creating internal organizational culture that supports a multiracial staff.

Foundation boards, too, must include people who bring lived experiences relevant to the work of the foundation, drawn from the communities reached by the foundation's giving. While this may take time, funders can begin by establishing advisory councils and using effective mechanisms for soliciting advice from community members. “You need to be doing the learning and training inside the board,” says Thor. The San Francisco Foundation and Northern California Grantmakers offer trustee-focused trainings on racial equity that can be a good starting point. This is a core component of an emergent field of practice among philanthropic boards known as purpose-driven board leadership, which also involves putting purpose before the organization, an equity mindset, and a deep respect for the ecosystem in which the institution works. Investing in the awareness and

skills of the thousands of individuals who hold trustee responsibility for the trajectory of philanthropy will be an imperative if we seek to sharpen the impact of the sector.

Foundations can reconceptualize the role of program officers. Program officers often possess expertise, information, and insight that can strengthen decision-making. However, they frequently aren't allowed into board meetings, a practice that constrains the potential for program staff to serve as valuable translators and advisors to board members. Foundation staff and grantees too often feel constrained in their interaction with foundation board members rather than empowered to fully present their points of view or challenge faulty assumptions. The Libra Foundation disrupted this dynamic. "The board trusts that the staff is close to grantees, and follows their guidance on grantmaking slates," says Hayling. "The board operates at a strategic level, not reviewing details of every individual grant." The Libra Foundation now uses board meetings as shared board-staff learning opportunities. Staff bring strategic questions to the board and they grapple together. Hayling is also taking the board on an [equity journey](#) intended to transform how board members think about Libra's philanthropic practice.

Beyond the foundation staff/board member divide, foundation grantees face challenges connecting with foundation staff due to prevailing power dynamics in the philanthropic sector. Black, Indigenous, and Latinx-led organizations only receive 4% of total philanthropic grants and contributions.<sup>33</sup> A longstanding narrative among nonprofits led by BIPOC is that foundations don't trust them and therefore won't fund them, so they stop reaching out.<sup>34</sup> "BIPOC-led nonprofits also often don't speak the same language or use the same frameworks as philanthropies, and translating their work can take

up too much of their time," says Armando Castellano of the Castellano Family Foundation. "It's the role of the funder to bridge that gap."

Grantees also experience the implications of the power imbalance in restricted, short-term grants, which limit their flexibility. By contrast, the established best practice of multiyear, general operating support allows for the autonomy that good decision-making requires. Additionally, when foundations saddle nonprofits with onerous reporting requirements, the resulting busywork detracts from time that could be spent building trusting, long-term partnerships that leverage expertise and strengths. Familiar yet bureaucratic grantmaking practices—requiring lengthy and cumbersome proposals, detailed financial information, exhaustive evaluation and impact measurement plans, and time-consuming reporting protocols in exchange for a \$25,000 grant—add stress to relationships with community leaders and distract their attention from community needs and emergent opportunities, ultimately reducing donors' impact.

The most efficient way to deepen community-centered impact involves changing funders' practices. "The structures and practices of philanthropy continue to widen the gap between community and decision-makers," says Sparks. "Donors don't have the same level of urgency that our communities or nonprofits are facing," says Ali Sirkus Brody, senior philanthropic advisor at San Francisco Foundation. "We have to figure out how to inject that urgency into this moment."

<sup>33</sup>Inclusive Impact," New Profit, February 24, 2020.

<sup>34</sup>Cheryl Dorsey, Jeff Bradach and Peter Kim, "Racial Equity and Philanthropy: Disparities in Funding for Leaders of Color Leave Impact on the Table," Echoing Green and The Bridgespan

## 5. Update outdated grantmaking practices

# Case Study: The David and Lucile Packard Foundation Invests in Pajaro Valley

In 2017, an increase in Immigration and Custom Enforcement (ICE) raids led to significant negative impacts on the residents of the rural Pajaro Valley of Santa Cruz and Monterey Counties.

The impacts were felt especially intensely by immigrant children and their families and the nonprofits serving them.

The David and Lucile Packard Foundation's grantee partners and other community stakeholders in the Pajaro Valley voiced their concern, describing the devastating effects the raids were having on community security and well-being. Given the Foundation's longstanding commitment to this region, it was essential

for Foundation staff to be an ally to support the community at this critical time.

Foundation staff began by convening grantee partners and community stakeholders to discuss better ways to support leaders from the immigrant community and foster individual and community safety. The group identified the need for better coordination of service providers, faith groups, grassroots organizations, and public entities to provide timely, accurate information and necessary services. At the group's request, the Foundation provided funding for a facilitator, identified by community partners, to work with the group to develop a coordinated response plan for the needs of families and children impacted by ICE detentions and immigration-related policies.

From the onset, Foundation staff transparently shared the available budget and communicated that decisions about how to use the funds rested with the group. Foundation staff made

themselves available for thought partnership, addressing questions and concerns as the group continued their planning. Over the course of three meetings, the group formalized a proposal

and the Foundation provided \$800,000 in a multi-year grant to cover both overall coordination and collaboration among stakeholders, as well as multiyear general operating support grants for organizations providing direct services to immigrant residents threatened or directly affected by ICE activity and policy changes. All the community stakeholders who participated in developing the strategy and funding plan received a stipend to

partially cover their investment of time in the process.

For Foundation staff, listening to grantees was not new. But turning control over to a group of grantees and non-grantees seeking support beyond the Foundation's traditional funding areas was a departure from the usual ways of operating and represented a promising new approach to effectively meeting community needs. "As staff, we were learning new ways of working with our grantee partners," recounts Irene Wong, director of the Foundation's Local Grantmaking Program.

Learning from its experience in Pajaro Valley, the Foundation was well poised to respond when the COVID-19 crisis hit. Using a similar approach, the Foundation deployed over \$2 million in funding in Monterey County, with community-based organizations working in the areas most impacted by COVID-19 exercising lead responsibility for funding recommendations.

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“This was a new way of grantmaking for us, but in the end, we knew we could and would stand behind the community's proposal because they are the experts. We had to demonstrate our trust in the long-time community leaders who have the knowledge, commitment and credibility to make the changes we all wanted to happen.” —Irene Wong, Director of Local Grantmaking, The David and Lucile Packard Foundation

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<sup>32</sup> Susan Wolf Ditkoff, Alison Powell, Kyle Gardner, Tom Tierney, "Four Pathways to Greater Giving," The Bridgespan Group, November 2018.

# A CALL TO ACTION

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Shifting philanthropy's outmoded ways of working is the challenge that will define the sector in the coming decade. Committing to transform our region means that everyone rolls up their sleeves and puts the good of the whole—a shared vision of inclusive regional prosperity and well-being—above individual organizational mandates and missions. This requires funders to embrace new narratives of possibility and inclusive decision-making, invoke new mental models, shift organizational and philanthropic sector culture, change default behaviors, and make bolder, more generous, and community-responsive commitments . . . and to act on them. The case studies included here demonstrate that nonprofits—especially those led by and serving BIPOC populations—are already exercising leadership to affect these shifts. It's time that we joined them.

Northern California Grantmakers has a suite of tools and content to support philanthropic shifts toward sharing power, leveraging multiple forms of capital, centering racial and other forms of equity, and philanthropic practices demonstrated to yield significant and lasting change. Taken together, this suite of actions can seem daunting. Every philanthropic entity has the capacity to start the journey somewhere, remain steadfast in transforming their practice, and accumulate colleagues, allies, and supporters along the way that will evolve these approaches from aspiration to reality.

This work is urgent because both the needs and the opportunities are pressing. The future of our communities is at stake. Let's do what needs to be done—together, for good.

# ADDITIONAL RESOURCES

Many thoughtful Bay Area leaders have discussed our regional challenges and outlined solutions. And we have leaned on the writings and insights of national leaders asking our sector to reimagine philanthropy. The following partial list of resources informed and inspired our writing. We hope you find them useful.

## BAY AREA AND REGION-SPECIFIC REPORTS

1. [2021 Silicon Valley Index](#), *Joint Venture Silicon Valley*, 2021.
2. [A Roadmap for Economic Resilience: The Bay Area Regional Economic Strategy](#), *Bay Area Council Economic Institute*.
3. [Bay Area Equity Atlas](#), a partnership of the *San Francisco Foundation*, *PolicyLink*, and the *USC Equity Research Institute*, ongoing data updates, most recent 2021.
4. [Blueprint for Change](#), *Castellano Family Foundation*, 2020.
5. [SPUR Regional Strategy: The Bay Area of 2070](#), *SPUR*, 2021.
6. [Taking Count: A Study on Poverty in the Bay Area](#), *Tipping Point Community and UC Berkeley Othering & Belonging Institute*, 2020.
7. [No Going Back LA](#), *The Committee for Greater LA*, 2020.

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14. Walker, Darren. "[How Philanthropy Can Shape the 21st Century Gospel of Wealth: A Move From Generosity to Justice](#)." *The Chronicle of Philanthropy*, December 10, 2019.
15. Wong, Nate and Andrea McGrath, "[Building a Trust-Based Philanthropy to Shift Power Back to Communities](#)." *Stanford Social Innovation Review*, November 20, 2020.