REFLECTIONS ON THE Satterberg foundation

CHAMPIONING TRUST BASE PHILANTHROPY

a report by Headwater People

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INTRODUCTION

It has been a privilege and an honor for all of us at Headwater People to spend this time with the Satterberg Foundation team and with your wonderful grantees. Having the chance to support the work of people who practice such deep commitment to relationship and power sharing, is a gift we do not take for granted.

We designed our process to emerge, with grantees, an authentic and honest evaluation. We purposed to discover how the foundation’s approach to grant-making impacted grantees and how that approach ultimately affects outcomes in the community. Additionally, we intend, in every touchpoint we have, to contribute to the powerful work that grantees and the Satterberg Foundation team are having in their communities in any way we can.

For us, the success of this process depended on an environment where grantees felt affirmed and acknowledged in their identities, were appreciated for their work, and had a meaningful opportunity to connect with each other. We are grateful to say that through the concerted commitments of the Satterberg staff, the grantees themselves, and our own team, the spaces we were able to create together were not only affirming and inspiring, but often healing as well. What follows is a summary of what we learned.

METHODOLOGY

Insight Circles: Grounded in a strength-based Indigenous approach to appreciative inquiry, we hosted Insight Circles. We believe that although the challenges of this moment are immense, focusing on aligning our strengths is a strategy more likely to create sustained and effective change than focusing on defining our weaknesses. These group sessions elevated the strengths of the partnership between funder and grantees for the sake of aligning efforts behind what is already working to build energy and capacity for overcoming challenges and failures by dwelling on the positive, developing clarity around what the Foundation’s core impact may be in order to better understand the communities they are engaging, and how to increase impact and effectiveness.

Online Survey: Responses were shared by grantees both through rating (1 – Not at all, to 5 -) and sharing written feedback.

Headwater People facilitated seven Insight Circles with 109 attendees from CBOs based in California and Washington. 94 grantees also responded to the online survey.
OVERVIEW

Throughout this report, feedback and insights are shared for the following topics:
Foundation’s understanding of the operational needs of grantee partners and the communities they serve

• Agility in responding to grantee partners’ feedback and capacity for dynamic growth
• Clarity in communication and solicitations
• The impact of the foundation’s processes
• Relationships and communication with foundation team
• The Satterberg Foundation’s reputation in their communities
• Areas for growth and increasing impact
OBSERVATIONS OF THE GRANTING PROCESS

The Satterberg Foundation’s understanding of the operational needs of grantee partners and the communities they serve.

The foundation’s low effort grant application and renewal processes for the general operations support for multiple years is the most impactful support for grantees. These practices take away paperwork and support their community work, and grantees recognize these as relationship-building activities. Relationships are centered instead of writing strengths, and the work with and for communities is uplifted.

The uncertainty and instability of operating during a pandemic conspire towards significant threats for grantees. The funding philosophy that releases money to worthy organizations without burdensome documentation, not only frees priceless time but it also cultivates a sense of faith and confidence that can be invaluable as well, especially in a crisis.

Did the RFP reflect your community’s concerns and priorities?
87 responses

Did the outcomes for the grant align with your community’s interests and aspirations?
93 responses
Agility in responding to grantee partners’ feedback and capacity for dynamic growth.

Multiple organizations were and are on the edge between financial infeasibility and providing transformational services to their communities. It was specifically due to the way Satterberg staff affirmed the value those organizations represented and their expertise in how to do their work through flexible and long-term funding, that these organizations are having the impact they are. Without the specific way the foundation meets grantees where they are, this would not have been possible.

Despite the inherent power dynamic, organizations feel the relationship is uniquely transparent, bringing balance and purpose to encounters. Centering the relationship showcased the alignment between the foundation and the grantees, and success feels shared. Examples of the centering of relationship abound – from Executive Director transition support, to reporting and application practices, to unrestricted funds, and allocating multiple years in one year – to support rapid growth.

Clarity in communication and solicitations

During the proposal process, grantees shared that the communications were easy to understand, and it is easy to email the program officers. There is immense appreciate for how flexible and accessible the staff are. The continued in person site visits allow for continual relationship building.
THE IMPACT OF THE FOUNDATION’S PROCESS

Along with the impact of the funding support, grantees spoke to how the unofficial support, nonfinancial support, and networking and relationship building opportunities have great value. When grantees can engage in the cohort spaces that the foundation hosts, they find them helpful and an opportunity for storytelling. Grantees also noted that receiving monetary support from the foundation, expanded their access to other funders and strengthened their creditability.

The collection of community-based organizations that the Satterberg Foundation has brought together is a wonderful group, and wonderfully diverse. However, even seemingly disparate missions found alignment and mutual encouragement in our time together. Cultivating a healthy, relational network can spark new imagination and encouragement and the importance of which cannot be overstated.
How did the work to complete the proposal impact your mission?
85 responses

To what extent has this process enriched your network?
92 responses

Do you share a sense of mission with the foundation?
92 responses
Relationships and communication with the Satterberg team

We heard from grantees that they experience authentic relationship-building, showing them that the Satterberg Foundation operates in a different ethos. Program officers are affected by the real time events and humanize the funder-funded relationship. In most cases, the time program officers have invested in sharing meals and visiting have produced real friendships. These friendships open the door for deeply trusting relationships where the actual challenges and opportunities that grantees are experiencing can be shared without editing or censure and thereby empowering the funding relationship uniquely. Specifically, their openness to learn, listen, and engage is special.

In addition to person-to-person development of trust, the structuring of long-term support via finances and other events to connect make a tremendous difference. This multidimensional illustration of the Satterberg Foundation’s trust in grantees has developed exceptional ties. This holistic embrace of the work of the funded partners is an experience we consistently heard described as singular.
The Satterberg Foundation’s reputation in their communities

We heard that the Satterberg Foundation’s story is one that needs to be told. Grantees see the Satterberg Foundation as a leader in modeling how trust-based philanthropy generates stronger outcomes and sustained partners. So much of the Satterberg Foundation’s approach directly addresses the areas of funding that seem broken, and there is a lot of energy to see it replicated.

One outcome of doing things differently to center the agency of grantees is that the foundation’s approach has highlighted the need for other funders to follow their example. One consistent vision for the future we heard in every insight circle was that the Satterberg Foundation might compel more funders to build similar structures to theirs.

Promote the successes of the Satterberg way of doing things. A study of the effectiveness of trust-based philanthropy versus the status quo that looks at the resulting health of organizations and the measurable effects in the communities they serve could be a compelling tool for other funders to learn and adopt from.

Areas for growth and increasing impact

After the time we spent with grantees, reading through their feedback, and sharing a circle space with the program officers, we identified a few areas that the foundation can grow in or increase their impact.

1. Integrate emergent strategies for organizational support. One is to address the gaps in technology resources and proficiency many organizations are feeling. As the pace of innovation speeds up, some organizations need capacity and support to stay current and connected with their communities. COVID-19 illustrated how vital technology can be to connect community members with services, and how technology disparities magnify inequity.

2. Explore the possibilities of influencing systemic drivers of inequities. Some grantees describe their work as winning battles but losing the war. As successful they are at improving and resources many lives through their organizations, the forces that keep producing the conditions that make their work necessary are political and societal, and these are increasing. Political mobilization that builds coalitions and democratic policies that improve the lives of people at a population level could be advanced by the foundation.

3. Explore opportunities to leverage other foundations that are less progressive. Get more foundations to take more risks. Influence others to reduce reporting.

4. Explore how community members can be better represented at the foundation. Professional development for community members, possible through a fellowship and/or internship program.

5. One area of improvement comes from a story about a site visit. While we heard numerous recalling of how moving, affirming, or even healing site visits were, there was one which had some critical feedback. In this site visit, the board member happened to be, or appeared to be very young and came across to the grantee as not interested in their mission. The impact on this grantee was the loss of the opportunity to share why their work is so necessary to a willing listener, and getting that message out, for this person, is as important as the money itself.
Reflections

Staff experiences and perceptions

The time we shared with the program officers allowed for reflection on their experiences working with grantees. Staff discussed that above all they aim to center humanity, recognize the power imbalance, and see themselves as partners.

The stories about the reciprocal nature of the relationships built between the program officers and grantees, illustrated the catalyst for the rare circumstance for grantees and funders to show up just as they are. The staff have a sincere appreciation for the responsibility of hearing and learning grantees’ stories and grantees recognize and benefit from the foundation’s approach.

The outcomes for the CBOs and foundation are aligned and rooted in relationship building. Outcomes are not just about statistics. There are deep commitments here for trusting and empowering grantees to make their own decisions that ultimately generate better outcomes.

This philosophy is clearly having significant impacts. Grantees have enough trust to be vulnerable in sharing their visions as well as their difficult times without fear of losing their funding. This background of relationship and trust builds up organizations independently of the financial backing. The simplicity of being recognized as the expert in their own field by funders can be a new and freeing experience and opens the door for more authentic support and shared strategy.

Recommendations:

1. We also acknowledge that relationship building takes significant time, and if grantees are to increase, we recommend that the capacity of the program officers be reflected upon to ensure nourishment for those staff.

2. Listening to grantees about who should be funded is an opportunity. Partnering with grantees to find those potential partners who are overlooked. Engaging others and build influence for networks.

3. Continue to cultivate relational networks. Increasing grantee cohort spaces may build community support and require less one-on-one program officer time.

4. Share out a paper or report that highlights the grantees’ work and how trust-based philanthropy impacts outcomes.
A heartfelt thank you to Rosa and the entire Satterberg Foundation for this opportunity to tell this story. Having the chance to lift up the aspirations and very hard work of this incredibly talented and innovative community has been a wonderful honor.

And very deep gratitude to all of leaders and change agents who shared mana’o with us, generations are better off because of you. Thank you for your tireless work on behalf of our children and all those children who will follow.