

# GLOBALWA

## GOALMAKERS 2023

ADVANCING **TRANSFORMATIVE** PHILANTHROPY



# 2023 CONFERENCE SUMMARY REPORT



## INTRODUCTION

### Advancing Transformative Philanthropy

The Goalmakers Annual Conference, now in its 14th year, is the premier event for global development practitioners, funders, companies, and partners on the West Coast.

This conference gathers top international development practitioners, business executives, corporate social responsibility leaders, academic researchers, philanthropists and others who are seeking ways to tackle immense challenges.

The theme of our conference this year was Advancing Transformative Philanthropy. This reflects recent trends in funding for global development to create more equity and stronger partnerships in philanthropy. The speakers and participants examined the funder and recipient relationship, and tested a theory that co-creation creates stronger, more effective partnerships and yields better outcomes.

Examples discussed at the conference include U.S. based foundations that support community-based organizations in a low- or middle-income countries, U.S. NGOs that subcontract to other organizations, and giving circles that give to grassroots organizations outside the U.S.



Participants unpacked the inherent power dynamics between funder and recipient and discussed how the co-creation process could determine better, more equitable relationships. This builds on last year's theme of co-creation – a timely and relevant issue applicable to all who work in global development.

The conference was two days, with a virtual day on Nov. 30 and an in-person day in Seattle on Dec. 7.

Global Washington convenes “Goalmakers” whose work is critical to advancing the Sustainable Development Goals (SDGs). Goalmakers are those who are singularly focused on building a more equitable, healthy, and prosperous world for everyone.

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## DAY-1 OPENING REMARKS

### Ready for a Deep Dive

**Kristen Dailey**, Executive Director of **Global Washington**, started the first, virtual day of the conference with a description of theme. She said it came from two years of conversation with GlobalWA members working on localization: “shifting decision making to closer proximity to where the work is being done.”



Kristen Dailey

*We come as a neutral platform to unpack the power dynamics between funder and recipients.*

~ Kristen Dailey



“People are starting to make these changes,” she said, but for the concept to be fully realized, funding must follow. “So today we’re going to dive in deep around funding and the relationships between funder and recipient when it comes to global development.”

At last year’s conference, Naina Subberwal Batra, CEO of AVPN, and Degan Ali, Executive Director of Adeso, both gave impassioned calls to increase funding going to organizations based in low- and middle-income countries. “They were very provocative and sparked a lot of conversations,” Dailey said.

The theme of the 2023 conference allowed participants to do a deep dive into these concepts of philanthropy for global development and localization. Global Washington believes that the principles of co-creation can increase equity in funding relationships and curated speakers at the conference to give concrete examples of how this would work to inspire others.

“We come as a neutral platform to unpack the power dynamics between funder and recipients.” It’s a place to talk about what works and what doesn’t and set the stage for co-creation, she said. “We hope that you come away inspired and find a new connection.”

## OPENING KEYNOTE

### Trust-based Philanthropy



Rebecca Darwent

**Rebecca Darwent**, Senior Adviser, Collaboratives for **Philanthropy Together**, talked about collective giving. Though it fits the current trend in trust-based philanthropy, it's not a new idea. "It is not an American concept or a North American concept or a Western concept. It is deeply rooted in cultures and communities around the globe."

The idea is to create a sense of belonging, and make room for communication, and to give abundant long-term funds to those who need it.

"What we're looking for is a shift towards a "many to many" approach," Darwent said.

She listed three core elements: pooled resources, multi-level cooperation, and scaled systems impact.

There are about 400 collaborative funds around the world, Darwent said. She gave three examples of creative and effective action.

1. The Equality Fund. "In this case we have global feminists making decisions on behalf of and in solidarity with feminist leaders around the world."
2. The CLIMA Fund, which supports international grassroots movements to fight climate change. Among their large partners is La Via Campesina, a global movement of over 200 million peasant farm workers.
3. Dasra, in India, has given more than \$300 million to 1500 NGOs in India. Among their projects: a girls' adolescent collaborative, including more than 300 "girl champions" from 85 villages in three states, who did a letter writing campaign to successfully lobby the government to create an "adolescent health day."

If you want to give, it's important to figure out how to be as collaborative as possible, she said.

"How are you really reaching out to communities and networks that you may not be in contact with regularly? Who's at your table? Who's setting the priorities and is there a way that you can use collective giving, and tapping into the wide network of collaborative funds in particular, to really distribute your dollars in a way that is going to get to the people on the ground?"

One common misconception about trust-based philanthropy is that it is hands-off. Darwent said that the opposite is true: it involves close communication. For example, donors need to let the people on the ground set the goals for what they want to achieve.

*What we're looking for is a shift towards a "many to many" approach.*

~ Rebecca Darwent

She gave an example from her earlier work doing street outreach in New York City. She was trying to convince an unhoused person to go into a shelter. "They came back to me and said: 'Rebecca, you have no idea how much safer it is for me to sleep in the subway tonight,'" she said. "That helped me recognize my positionality, and me saying 'this is what's good for you,' is not how it works."

Collaborative giving means listening first.

Dailey asked how donors can go about establishing trust, when they are looking at supporting grassroots organizations in other countries.

Darwent suggested doing research on the issues. Some organizations with up to date information about different funds are Bridgespan, Philanthropy Together, and the Gates Foundation.

Power dynamics are something to always be aware of, but she hopes that donors who support collaborative funds flex their power in one important way: encouraging their peers to also support trust-based philanthropy. She encouraged the audience to think about this question: "How can you use your social capital to benefit the partners on the ground and to shift the sector that you are in?"



## BREAKOUT SESSION

### Community-Driven Solutions: Insights from Type 1 Diabetes Leaders

Representatives from three organizations serving people with Type 1 diabetes, one in Ghana, one in Uganda, and one in Argentina, discussed the power of community leadership, and how global funders can be most helpful for community-based Type-1 diabetes work.

The facilitators, **Sierra Fox-Woods** and **Julia Roper**, represented the “Type 1 Diabetes Community Fund,” a global fund administered by **Panorama Strategy**. Backed by Helmsley Charitable Trust, the fund provides flexible grants to 16 partners around the world, including the three with representatives on the panel.



Sierra Fox-Woods



Julia Roper

**Emmanuel Kwafo Mintah** is Executive Director of the **Ark Development Organization** in Ghana. Ark runs screening programs through schools and churches to identify patients, particularly children and teens, and then once they find them, they support them in various ways, including medication, education, and livelihood support for families. “We take pride in improving the lives of people living with T1D,” Mintah said.

Mintah gave a case example, after finding a young man’s Type 1 diabetes in an Ark screening event, and having the diagnosis confirmed in the hospital, Ark supported the man’s family with education and with income assistance, in this case helping the man’s twin sister with a small business to provide a livelihood.

Because of their network and contacts within the region, they can reach remote villages and can do “social mobilization,” Mintah said. “Looking at cultural competency, we have the ability to create demand at a grassroots level.”



Emmanuel Kwafo Mintah



**Laurien Sibomana** founded **Pillar of Health** in Rwanda, in 2020, to help people with type 1 diabetes and their families pay for care. They provide health insurance for three dollars per person per year, with hospital copays of 10 percent. They help families gain income using livestock and small business. Lately they have found that when patients make the trip to the hospital for education – sometimes walking five or six hours – they are likely to have hypoglycemia, so they started providing breakfast.

Sibomana said that as a local organization, Pillar of Health can understand the needs of patients. “If you talk about type 1 diabetes, you think about insulin, but insulin is not enough.” Patients need safe food, and money, and needs can change from district to district within the country.

In Argentina, **Pilar Arrossagaray** first came to her organization, **CUI.D.AR**, at age 12, after she learned she had type 1 diabetes. CUI.D.AR trained her in their “young leaders with diabetes” program. “Without a doubt, that program was a turning point in my life with diabetes.”

She not only learned how to manage her condition, but she found a purpose in advocating for others.

CUI.D.AR works on prevention, care, research, education, and advocacy, with patients taking the lead. For example, at a meeting where youth with Type 1 diabetes met with the national minister of health, “it was the children and young people themselves who told a national minister what it is like to live with diabetes and what challenges we face.”

It’s important to have the patients at the center, said Arrossagaray. “Let’s imagine a scenario where diabetes is only understood through clinical data. The major flaw is it does not capture the voices, the opinions, the needs of people with diabetes.”

Roper asked the panelists what challenges they face when working with international funders.

Minta said that as a small organization, Ark doesn’t qualify for many programs because it doesn’t meet capital requirements. Others offer one or two-year grants, which make it hard to keep a



Laurien Sibomana



Pilar Arrossagaray

long-term organization.

Arrossagaray said it is challenging “when funders focus on supporting only services that they are interested in and only in projects that can be quantitatively measured.”

When it comes to advocacy and empowerment, the impact can be mostly in qualitative terms. Or it can be in opportunities, such as when a meeting with a government official resulted in a scary discovery. “We became aware that a whole room full of glucagon was expired.” Glucagon is a life saving emergency medication that diabetics need in case of low blood sugar. But this large stockpile had never been distributed.

“We became aware that there was no registry of people living with type 1 diabetes. There was no information at all.” In response, CUI.D.AR created and promoted a bill to create a Type 1 Diabetes registry in Argentina.

Fox-Woods said this story shows how important grassroots advocates are. “That critical link that community-based organizations serve in terms of generating knowledge and information.”

Arrossagaray said her organization has benefitted from the quick communication and flexibility. Argentina is experiencing immense inflation – more than 140 percent over 2023 – and in order to get their support in US dollars, CUI.D.AR requested that the money be sent using the word “subsidy” instead of “grant.” Which the Type 1 Diabetes Fund did.

It was easy, Roper said. “It didn’t take something big or major to address this challenge, but it took something small.”

*The major flaw is [clinical data] does not capture the voices, the opinions, the needs of people with diabetes.*

~ Pilar Arrossagaray



## BREAKOUT SESSION

### Recasting the Table: How to Create an Enabling Environment for Community-Based Organizations



Anna Slattery

The moderator for this session was **Anna Slattery**, Manager for External affairs for **The Hunger Project**, one of the founding organizations of the Movement for Community-Led development. The name of this session, “recasting the table,” comes from panelist **Gunjan Veda**, Director for Collaborative Research Policy and Practice for the **Movement for Community-Led Development**.



Gunjan Veda

Veda is not a fan of the metaphor “resetting the table” when it comes to talking about shifting leadership. To her that brings to mind an idea of taking an existing table, adding four chairs, and then making local organizations around the world compete for those four chairs.

“And then, where is this table? This table is in Copenhagen, it’s in D.C. It’s in Geneva. It’s in places where it’s impossible for most local organizations to get a visa to get to that table,” she continued.

“You get there, and you realize ‘Oh my god, you don’t understand the food, you don’t understand the language. Everything is different.’ You’re so busy trying to figure out which fork and which knife is to be used, that you can’t focus on the reason you are at the table. Which is to say why and how things should be done.”

Thus, a new metaphor.

“Locally led development is about recasting the table with local actors.” That is a goal which has yet to be achieved. “The challenge is that we can’t expect the same people who designed the system to keep out local actors to now design a transformed system.”

One bright spot: the idea of community development is gaining

popularity. Nineteen bilateral organizations (the sort of funders run by governments) and 15 major philanthropies have signed statements calling for “locally led development.”

Now they just have to figure out how, Veda said.

**Nixon Ochatre** is the Founder and Head of Strategy at the **Amani Initiative**, in Uganda, which works on preventing and responding to child and teen pregnancy. Initiatives include working with more than 3000 schools to help young women return to their education after giving birth. It’s work that requires building long-term relationships with decision-makers within communities.

He would like to see more flexible, long-term grants available to support this work. “We need to be able to build sustainable structures that are able to continue work even after the funding expires,” Ochatre said.

**Dr. Rebecca Dali** is the Founder of the **Center for Caring and Peace Initiatives** in Northern Nigeria. The Center does a lot of work on helping victims of violence, such as people recovering from kidnappings or people who witnessed loved ones being killed. They also do other initiatives to help peace, such as deprogramming former members of the violent Islamist group Boko Haram.

She has experienced big outside donors trying to tell her how to do her work in the community. Her organization did not accept those directions. “We said... we know the people personally, and there are some things that you have to allow us to do,” Dali said. “You have to accept our culture here.”

Some funders agreed to those conditions, and some didn’t. And the people she works with in Northern Nigeria have not been well served by big global funders. “The money is there in millions but what will trickle out to the local people who are really suffering would not even feed them,” she said.

Slattery asked the panel their views on co-creation, defining it as the “the process of collaborating with other stakeholders to guide the design process.”



Nixon Ochatre



Dr. Rebecca Dali

Dali has had success with it. She finds it a great way to generate ideas and play on the strengths of all collaborators. “During co-creation you will learn from each other and then make a whole that will support a lot of people.”

For example, a group of community organizations brainstormed how to respond to the vote-rigging and violence in the Nigerian election and came up with a sensitization campaign. The Hunger Project gave a \$5,000 grant to fund it. “We reached millions of people,” she said. “It reduced the killings and the suffering in our Nigerian election.”

But not everything called co-creation turns out to be effective or lead to real support for local work.

Ochatre says that for effective co-creation, funders need to be transparent about what kind of support they can give, and they have to set things up so that the end recipients of the aid – the communities of young women he serves – direct where discussions go. “It has to be intentional, bringing on board the people at the center.”

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~ Nixon Ochatre

Veda says that what some funders term “co-creation” turns out to be a competitive funding process. One organization she knows in Sierra Leone participated in a co-creation process with a big bilateral funder. They didn’t have a staffer directed to pursuing funds this way, so everyone doing it was also doing work in their community. There were 16 steps.

“And after 15 steps they were told ‘Sorry, you did not get this,’ without explanation as to why they did not get the funding,” Veda says. “Now imagine what they have to go back and tell the communities.”

This is not collaboration, Slattery says. “It almost feels like those business school competitions where you’re like: ‘What’s the best business case you can make?’ and then whoever gets through the 15th round would win the money,” she said.

Too often so-called “co-creation” is exploitative, Veda said. “Right now, co-creation is essentially communities and local organizations from the majority world providing pro bono consultancy and

knowledge and expertise to the world's biggest funders. And that is not what co-creation should be."

Ochatre said the ideal often falls short. "Co-creation is the right way to do it, but co-creation needs to be done right."

Slattery asked the panel what they would change about how major funders behaved.

Veda said funders need to move to a trust-based model. She would also like to see systems set up, such as due diligence passporting, or equivalency determination, so that local organizations don't have to constantly prove who they are whenever they approach a new funder.

She would also like to see funding applications available in more languages. "If you make the language English only, there is a whole group of organizations who will not be able to get that funding."

Dali would like to see more respect of local organizations' work and judgement.

Ochatre wants to see more true collaborations. "Collaboration involves trust. Collaboration involves respect. But also, collaboration provides room for failure and to learn from those failures. Most of us as local organizations, we fear to report failures because the relationship is based on a boss or someone to report to."



*If you make the language English only, there is a whole group of organizations who will not be able to get that funding.*

*~ Gunjan Veda*



## PLENARY PANEL Funding Disaster Relief

This plenary was moderated by **Akhtar Badshah**, Distinguished Practitioner & Senior Lecturer, **University of Washington** and Author, *The Purpose Mindset*, and brought together representatives from two different aspects of global disaster response.

When responding to a disaster, there is no substitute for local knowledge



Akhtar Badshah

**Kezia Fernandes**, Lead for Disaster relief and New Initiatives, for **Amazon** in India, works on logistics: what supplies are needed to be where. **Sheena Agarwal**, Vice President of Operations for **Give2Asia**, works to make sure local organizations have cash to respond to a crisis. Both of them see themselves as supporters for local organizations who have the people and contacts on the ground.

Fernandes says that Amazon relies on locally based nonprofits to tell them what supplies they need. Amazon's job is simply to deliver. "Our focus has been on how do we get items to communities, with a focus on speed."

Amazon disaster response maintains three hubs in India, each with a stock of non-perishable items. They designed the network after looking at data for India, identifying 220 "disaster hotspots:" places with at least a one in four chance of help being requested in a given year. The idea is that each hub can cover a 700-kilometer radius and deliver goods within 18 hours.

But all the details depend on local aid organizations, Fernandes said. "It's really critical for us to have an ear to the ground, and the only way we can do that is by our nonprofit partners who are at the grassroots."



Kezia Fernandes



Sheena Agarwal



Each organization has a short simple online form – five or six questions – that they can send to Amazon via WhatsApp.

Amazon's strength is in finding and delivering the goods. Once they hand them off, the local organization is in charge of distribution. Sometimes the local organization takes on part of the delivery role too. For example, in October, a glacial lake burst its banks and caused devastating floods in Sikkim, washing out roads and bridges. Amazon's nonprofit partners reached out to the armed forces, who came with helicopters to move the goods to the communities.

"You really have to rely on local expertise because they know best," Fernandes said. While they share information about how other organizations have dealt with disaster response, it's up to the local groups to come up with strategies. "We see our role as giving them suggestions."

Give2Asia originated in the wake of the 2004 Indian Ocean Tsunami. Since then, they have helped respond to 40 different disasters, mobilizing 80 million dollars to support hundreds of local organizations.

There are big flaws with the way global philanthropy usually responds to disasters, Agarwal said. "It's extremely reactive, when we know that all these disasters are largely predictable and cyclical, and they're funded too late and for too short of a time."

Disasters may be destructive, but they are rarely unforeseen. So Give2Asia organizes itself to be ready for the next event. For example, they do all the vetting and other paperwork – "all that stuff that you won't want to be burdening them with" – in advance, so that when the emergency arrives, they can move money quickly.

"We're really doubling down on this idea of trust-based giving and saying, 'how can we make this as easy as possible for those partners during a crisis,'" Agarwal said. "As soon as a donation comes in, within 24 hours we can have that mobilized to a partner on the ground."

*We're really doubling down on this idea of trust-based giving and saying, 'how can we make this as easy as possible for those partners during a crisis.'*

~ Sheena Agarwal



Though they don't just send money where today's crisis goes. Disaster relief is one of the things that the global aid community does pretty well, funding it at 98 percent. But other kinds of support don't see the same kind of generosity. As a result Give2Asia keeps 30 percent of pooled donations for longer term. "We know that once the headline fades, that funding fades," Agarwal said.

Badshah asked for the speakers to talk about where things go wrong during disasters.

Fernandes said they've been problem free, but the one thing they are afraid of, and that they caution their local partners about constantly, is the orderliness of distribution. "We want to prevent rushes and potential situations that lead to stampedes."

For Agarwal, the main headache is dealing with funders with unreasonable expectations. "Saying things like we want to onboard a group that's in the middle of this crisis for a big grant that they're going to need a proposal for," and then not being flexible when told it wouldn't work.

Another way funders cause problems: "Wanting to do things that are quite frankly a PR headline versus something that actually makes a difference. What I find is that a lot of the CSR teams are actually PR people," Agarwal said. "I find that those people are really not informed unless they have really good disaster teams."

The future looks busy for disaster relief.

"The number of disasters is just going up," Fernandes said. She sees a sign of hope in advances in technology. WhatsApp and Facebook allow rapid communication, even in hard-hit areas. "I am seeing technology and information sharing to be a key lever to help people understand the situation and what the response should be," she said.

For example, better weather forecasting and improved communication around evacuation have saved many lives during India's annual cyclone season. "In the past few years we've seen zero casualties because of cyclones, something that was unthought of or unheard of even five years ago," She said.

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~ Sheena Agarwal



Among the improvements: a Give2Asia initiative funded a GIS system on the coast, sending weather information to fishermen on boats in the Bay of Bengal. It saved many lives, Agarwal said, but it's the kind of thing that is hard to find money for. "These kinds of things for some reason are not super palatable for funders." Disaster preparedness returns six dollars for each dollar spent, but still less than one percent of disaster funding goes towards it.

Agarwal also takes heart in growing acceptance around the kind of trust-based giving that Give2Asia does. "I have hope in the way the intellectual conversation is moving around trust-based giving, about decolonizing aid, about localized solutions. All of those are moving in the right direction. Money needs to follow."

## PLENARY KEYNOTE

### Yawa Hansen-Quao



Yawa Hansen-Quao

Yawa Hansen-Quao is the Founder of the Leading Ladies Network, an organization that works on empowering young women in Ghana and mentoring them as leaders. She first rose to national prominence as the first woman student government leader in Ashesi University, a milestone she believes should really have happened earlier.

“After a few moments of celebration, the reality dawned on me that actually that’s not cool.”

So she founded the Leading Ladies Movement, to engage with girls and make new leaders, while promoting democratic values and career choices. “The earlier they engage the more likely they’ll continue into public leadership,” she said.

Part of this means promoting education, particularly in STEM fields, such as technology and robotics, and expanding educational opportunities for girls, including often-overlooked ones, such as mothers in the school system. It’s not just about what gets taught, she said. “I feel really strongly about not just the curriculum but the architecture of support that you can provide to allow women and girls to see their own agency.” She targets the “confidence gap” that young girls have when they become adolescents, a pivotal time when they make many decisions about their lives.

She has learned a lot along the way. “Any social entrepreneur knows, you start an initiative with a clear idea, and quite frankly a notion that you’re going to save a population, and much to your surprise you find that that population is teaching you more than you thought you would know, and in fact, also compelling you to consider new approaches that you didn’t come to the table with,” she said.

*The earlier they engage the more likely they’ll continue into public leadership.*

~ Yawa Hansen-Quao

For example, about five years after founding the network, she asked a group of teen girls what the word “empowerment” meant. “This 13-year-old girl raised her hand and said to me ‘empowerment is the ability to make things happen’,” Hansen-Quao said. “It taught me to go deeper, how do we support people’s ability to make things happen for themselves.”

Too often, the conversation about women in the global south emphasizes their vulnerability, Hansen-Quao said. It’s important to point out the ways girls are powerful and capable in their daily lives. For example, girls come to network events with their younger siblings in tow. “That’s leadership too.”

*It taught me to go deeper, how do we support people’s ability to make things happen for themselves.*

~ Yawa Hansen-Quao

It’s paramount for would-be leadership mentors to understand the strength of these young girls. “You can’t convince women of their power, if you are not yourself convinced they have any.”

Hansen-Quao has published two books. Her first, “Daughters of Zelophehad,” takes lessons from the biblical story of five young women who successfully lobbied for women’s property rights in the time of Moses. Faith is an important force in Ghanaian society, and Hansen-Quao wanted to use metaphors of faith as a way to talk about policy. “Unpacking something that is a universal truth: that God wants everybody to be successful, including women.”

Her second book, “The Leading Lady Way” is a call to action. “The goal with the second book was to speak with what I was witnessing, especially post-COVID, was this deep sense of helplessness and despair,” she said. “Women are made for more, and should keep reaching for those highest ambitions.”

In her work with global funders, she has seen some ups and downs. “There’s a fine line between advising and suggesting and dictating, and I’ve seen a lot of dictatorial funders.” Some funders require local groups to jump through many hoops to qualify. Others meddle in the day-to-day workings of the groups. “We can’t ignore that there’s such a power differential with a funder and a resource starved NGO.”

Her network tries not to be too dependent on outside funds. Instead, they pay for their free work with young girls by doing paid work for companies that want help training their high-potential

women. “That means our attention isn’t fully focused on just those girls,” she said.

She has noticed the growing popularity of localization. “I think that’s great but it feels like more rhetoric than actuality right now. “

Her advice to funders: provide long-term grants, and inform yourself from local sources. “Be more courageous in how you provide support to organizations. I’d also encourage you to listen more.”



*There’s a fine line between advising and suggesting and dictating, and I’ve seen a lot of dictatorial funders.*

*~ Yawa Hansen-Quao*

## CLOSING PLENARY

### The Changing Role of Funders

The closing plenary on the virtual day of the conference examined the evolution of funders' roles and how they should shift in the future.

The moderator, **Fatema Sumar**, Executive Director for the Center for International Development at **Harvard University**, said the drive for localization is the latest buzzword in a discipline with a history of coming up with new buzzwords every five to seven years.



Fatema Sumar

"People sincerely want to be embodying these ideas," she said. "But it's actually very difficult to change our bureaucratic DNA." With that in mind, we must be intentional about the desire to change. The panelists shared stories about how their organizations changed to provide inspiration for others.

The **Global Fund for Women** transformed how it gives out money. **Obed Kabanda**, the fund's Senior Director of Global Partnerships, Global Innovations and Accountability, said the organization used to give small grants to thousands of individual organizations, who made proposals and reported on outcomes. "People were spending hours and hours working on proposals and then reports every quarter, every mid-year or every year, and sometimes you're not even reading these reports," Kabanda said.

They have thrown out that system in favor of creating flexible long-term grants for 10 gender and climate justice movements around the world. The movements include more than 5,000 organizations in 180 countries.

Members decide amongst themselves what their goals are and what success will look like. "Decisions have to be made by those who are affected by the issues," Kabanda said.



Obed Kabanda



Organizations that used to compete against each other for smaller grants, now work together on projects funded through the movements. “There is power when grassroots work together,” Kabanda said.

**Mirta Postema** is Senior Program Officer for **Seattle International Foundation**, an intermediary foundation that gets money from other funders and then makes grants to support youth movements and independent journalism in Central America.

The foundation is putting trust-based principles into action with more long-term flexible funds. “In essence, working in trust-based principles is a way to flip the script,” she said. “It mirrors what we are trying to achieve in terms of equality and justice.”

Funders need to be aware of the power imbalance between them and local organizations and they need to look critically at every part of the way they do business. “Do we really need this information, and if we do need this information, is there an easier way to get this? What are we doing and why are we doing that? How can we make it easier for people to do their work instead of putting all kinds of funding restrictions on this,” she said.

All these can lead to better relationships. “This is more work for program officers,” she said. “You inform yourself better, you read what they’re doing, you look at all these things instead of having them send it, and you can say ‘I have x amount of money available, I love the work you are doing. Let’s talk more about how you do this;’ that’s such a different tone.”

**Aisha Jumaan**, the President for the **Yemen Relief and Reconstruction Foundation**, said her organization began with a focus on relief efforts, providing food, clean water, and medication to help deal with the world’s largest cholera outbreak of modern times.

Over time, they moved beyond the emergency to fund education and economic development, particularly for orphans and women. They have distributed livestock, trained people in beekeeping and set up businesses selling Yemeni basket weaving. An upcoming project will provide overseas markets for women doing Yemeni embroidery.



Mirta Postema

*In essence,  
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~ Mirta Postema



Aisha Jumaan

What hasn't changed, Jumaan says, is their reliance on direction from organizations and community leaders within Yemen. "Our work was always done with the communities where they serve, listening to local voices and incorporating their perspective into our initiatives." Collaborating with people on the ground is particularly important in a war zone, she said, and she doesn't know of any other organization that had the geographical reach hers did. "It took our volunteers over nine hours of travel time to reach some of these communities."

At the same time, Jumaan pursued a campaign in the U.S., advocating for the end of the war. All the cash went to relief efforts, so there was "zero budget" for advocacy, Jumaan said. "It started with me, just really me, figuring out how we do this."

But different people came to support the cause. The first volunteers were Mercer Island high school students. She did presentation after presentation for community groups and student groups and built momentum, gaining allies among other organizations.

She addressed hundreds of thousands of people at the Seattle Women's March, and started giving webinars for congressional staffers, and other people in government. "I did a briefing for the State Department about what's going on in Yemen and had a session where all the U.S. Government agencies were on and gave me a 20-minute presentation to talk about what's going on in Yemen and the impact of the war," she said.

In 2019, both houses of congress passed a resolution calling for the U.S. to remove itself from the war in Yemen. President Trump vetoed it but stopped refueling for Saudi Jets. The pressure led to a shift in Saudi behavior and a ceasefire.

Advocacy is central to the mission of her organization, Jumaan said. "Without the advocacy work, we would have continued to invest in something that would not stop."

But the impact of the political movement didn't happen overnight. It took years to gain visibility and allies. "It's not a one-time deal. I think funders need to recognize that," Jumaan said. .

*It's not a one-time deal.*

*I think funders need to recognize that.*

~ Aisha Jumaan



## DAY-1 CLOSING REMARKS

### Mind Shift



Kristen Dailey

In her closing remarks, Kristen Dailey said she had been inspired by what she'd heard. "What the speakers expressed today is a mind shift from traditional philanthropy to something very different," she said.

And it's going to take work to make it real. "If we don't have a very deliberate process to make this happen then it won't happen," she said.

*What the speakers expressed today is a mind shift from traditional philanthropy to something very different.*

*~ Kristen Dailey*





## Afternoon Plenary

Atul Tandon, Opportunity International

Surita Sandocham, Heifer International

Moderator: Jennifer Butte-Dahl, AFCD Worldwide

3:50 - 4:30 pm PST



## DAY-2 OPENING REMARKS

### Changing the Flow of Funding

Kristen Dailey welcomed people to the in-person day of the conference, which built on the inspiring conversations of the virtual day a week earlier. Dailey reminded participants about the theme of the conference to advance transformative philanthropy.



Kristen Dailey

She also announced the recent merger between Global Washington and Pangea Giving, a Seattle-based giving circle whose members pool funds to partner with grassroots organizations headquartered outside the United States. Dailey is excited about this merger and said it was one of the reasons for the conference theme.



The conference theme reflects recent trends in global development to shift staff and decision-making to low- and middle-income countries. More specifically, the theme is about resource flow.

“This conference is to talk about the flow of funding, from philanthropy, from individuals or corporations or foundations, to support the work in close proximity to where global development actually happens, but it’s also about looking at large INGOs and how they work with local partners.”

An important part of this is a commitment to co-creation, giving local organizations control over what they do. “Co-creation creates more equity by bringing a diversity of people to the table.”

Dailey said the overall objective of the conference is to advance co-creative partnerships. “Throughout the day we want to use the spirit of co-creation as we think about how philanthropy can be better for everyone.”

## OPENING KEYNOTE PLENARY

### Robert Rosen



Robert Rosen

Robert Rosen, Director of Philanthropic Partnerships at the Bill & Melinda Gates Foundation has an insider perspective on some of history's most epic philanthropic enterprises.

He joined the foundation 16 years ago, just after Warren Buffett decided to join his wealth with the Gates' fortune to create social change. "It was one of the watershed moments in philanthropy," Rosen said.

And Buffett hoped to convince others to join, following a long tradition that includes figures ranging from Andrew Carnegie more than a century ago, to Charles Feeney, who made \$8 billion through duty free shops and other investments, gave almost all of it away, and then lived a modest lifestyle until his death in 2023.

Rosen's department at the Gates Foundation is about facilitating more philanthropy. There are three main components to this work.

The first is funding what Rosen calls the infrastructure for philanthropy, including training, and data. "You know how crucial it is to have the data about what's happening and why."

The second is a collection of different programs focused on diverse givers, including the foundation's partnership with Giving Tuesday, which raised \$3.2 billion in 2023.

The third is work with high-net-worth individuals. With the most visible effort being the "Giving Pledge," a commitment to give away at least 80 percent of their wealth in their life and through their estates.

*You know  
how crucial it is  
to have the data  
about what's  
happening  
and why.*

~ Robert Rosen



Akhtar Badshah

*If you're just hitting singles and doubles and not swinging for the fences you are missing an opportunity.*

~ Warren Buffet (sic)

**Akhtar Badshah**, Distinguished Practitioner and Senior Lecturer at the **University of Washington**, asked Rosen about the state of small donations; while they still generate billions, there are fewer donors. “We are seeing this enormous growth, but we’ve also seen a decline in everyday givers,” Badshah said.

Rosen said there were several factors at work. The COVID crisis and its fallout caused an elevated number of people to give in 2020 and 2021. Economic anxiety is increasingly widespread. Tax code changes made in 2017 to itemized deductions may be damping people’s generosity. And some money may be going in other directions, such as person-to-person giving.

In the field of global giving, Rosen thinks the public would give more if they felt more “proximate to the issues.” Technology might help, he said, and that could change many lives.

Relative to how we make decisions around where we Americans can donate, Rosen reflected, “...giving to global causes, you are going to have an incredible return in terms of human lives saved or improved, the opportunities globally are just mind blowing.”

Rosen would like to see philanthropy move to a “two-way mindset.” “I wish we could shift from ‘I’m giving. I’m a donor,’ to ‘I want to see this outcome and I want to make a difference and here’s what I can bring to the table.’”

All stakeholders should be included in creating a vision of what to do. This type of collective vision can be powerful. “When we see a vision, when we see the resources which are absolutely crucial ...and we see the voices coalescing around where we are and where we’d collectively like to go, that change can be extraordinary.”

Getting there takes the right stakeholders, a cohesive strategy, and a willingness to take risks, he said, drawing on a baseball analogy from Warren Buffett. “If you’re just hitting singles and doubles and not swinging for the fences you are missing an opportunity. Philanthropy should take bold risks.”

One example: the goal of eradicating polio. Despite great effort, polio persists. “We’ve been this close. We’re still this close. It’s



going to happen.” Even though the campaign is taking longer than anybody expected, Rosen still counts it as a success. “You’ve got to set these bold audacious goals. When you fail or when you have disappointments, learn from them,” he said.

“We have intimidating challenges out there, but we also have so many solutions, and when we get the right financing, the right strategy, the right voices and the right alignment of stakeholders, extraordinary change is possible.”



## OPENING PLENARY PANEL

### The Changing Role of Funders

**Elizabeth Dale**, an Associate Professor at **Seattle University**, began the discussion of the changing role of funders with two relevant headlines:

The Center for Effective Philanthropy reported that the large unrestricted gifts of philanthropist MacKenzie Scott were overwhelmingly beneficial for those organizations, bringing more financial stability and the ability to expand programs. Only 2 percent of nonprofits reported any major challenge related to the influx of money, and 80 percent had no problems at all.

Also, Panorama Global found that funding to organizations has historically suffered from a lack of trust, but the Scott gifts counteracted that, cementing their reputations and attracting more funders.

The panel identified more trends to watch:

- **Moving away from centralized control.** **Rufaro Kangai**, Director, Emerging Movements and Opportunities for the **Global Fund For Women**, brought applause from the audience, when she talked about how her organization has moved all control of money from the central office to 10 movements around the world. “We are giving them millions and we are saying we trust you. You lead and we follow.”
- **A greater role for employees in corporate philanthropy.** **Alicia Vermaele**, the Executive Director of the **Starbucks Foundation**, said that before 2020, a small committee of foundation employees and a scattering of retail representatives decided where philanthropic donations went across North America. That ended after she had a conversation with a store



Elizabeth Dale



Rufaro Kangai



Alicia Vermaele

manager in a town outside Baltimore, who started their own local program supporting local nonprofits. “I said this is amazing. We are the Starbucks Foundation this is what we do, and this store manager said, ‘That’s great but you’ll never fund [our program] - we’re not important enough.’ It was such a defining moment of what are we going to do about that? How do we change that on its head?” Vermaele said.

The result is the Neighborhood Grants program, which now accounts for 95 percent of the foundation’s U.S. giving. Any employee in the U.S. or Canada can nominate a nonprofit for a grant. Last year they had 40,000 nominations and gave \$5 million dollars in grants to more than a thousand nonprofits. “It’s really democratized this process of who we are listening to so that it informs our funding,” Vermaele said.

- **Diversity of funding sources.** **Suzanne Ehlers**, Executive Director of **USA for UNHCR**, said groups are diversifying the sources of the funding they receive, and that has effects throughout the organization.

Her mother gives monthly. “She’s giving because she’s a devout Catholic and she cares for the suffering of humanity.” It’s a different reason for why Starbucks and Airbnb give, or why a partner such as Global Fund for Women would engage in something such as programs in a refugee camp in Ethiopia. “You’re diversifying the input that you get about how you shape and develop your programs,” she said.

- **Diversity of funding within a corporation.** At Starbucks, the ways they support farmers, particularly women and girls, and give to the community have diversified well beyond simple giving, Vermaele said. There are also corporate sponsorships, “commercial initiatives that do good, but also have brand reputation related outcomes,” and there are also core business investments, “using balance sheet investments for good.”
- **Tension between disaster and sustainable funding.** While donors are most generous in the case of disaster, the need doesn’t end when the headlines fade. Most emergencies don’t just go away but become protracted crises, said Ehlers. Refugees are often refugees for years.



Suzanne Ehlers

*You’re diversifying the input that you get about how you shape and develop your programs.*

~ Suzanne Ehlers





“It’s our job to help those supporters stay with us over time.”

- **Technology.** Kangai said the Global Fund for Women watches social movements around the world using a data science tool called the “Gender Justice Data Hub,” bringing new activism to their attention. Ehlers said that data science has become very helpful in fundraising.
- **Feminist funding.** Dale asked Kangai what makes Global Fund for Women a “feminist funder.”

“First, we understand that we are sisters, and we are connected, and we are a big family that feels passionate about gender justice,” Kangai said. Next, there’s a commitment to listening. “We don’t have programs that predetermine what we are going to do and how we are going to fund. We frequently conduct listening tours,” she said.

Ten years ago, they thought of long-term support as a three-year grant. Now it’s 10 years.

Local partners define the goals. “We actually ask our partners ‘What does success look like for you?’ We help them create the technical infrastructure that’s required that will help them collect and will help them articulate the results and learnings,” she said.

“The relationship is more than money.” The fund provides technical support, how to deal with donors, how to communicate and even self-care practices. For movements that don’t have a governing structure in place, the fund helps establish a steering committee.

The aim is to grow strong organizations. “We feel that we are successful when our partners exceed us in funding.” One success story: the Global Fund for Women seeded the African Women’s Development Fund, which has now grown to the same size as its parent organization.

- **Giving cash.** Ehlers talked about USA for UNHCR’s successful cash-based assistance program which gives small amounts of cash to refugee families for things like rent, school fees, and small-business start-up money. Eighty five percent of forcibly displaced people don’t live in camps but have bills to pay.

*We actually ask  
our partners  
‘What does  
success look  
like for you?’.*

*~ Rufaro Kangai,*



“I love this notion of autonomy to families, that in that moment have been stripped of so much decision-making power.” A gift of about \$140 can help a family pay rent, keep their kids in school and avoid debt. Putting the cash into local economies makes the host communities healthier and capable of taking more displaced people for longer.

- **Partners at all levels.** In May 2023, floods and landslides hit Rwanda, devastating a number of coffee-growing communities. The Starbucks foundation got in touch with their agronomists and farmer-support centers in Rwanda – people who support smallholder farmers that grow Starbucks beans. At the same time, they contacted one of their nonprofit partners, the Ripple Effect, and gave them a grant to help relief efforts in the hard-hit Southern province. Then they learned from their staffers in Rwanda that one of their suppliers had said there was an area of the western province in need of aid. So, the foundation offered to expand their grant if the Ripple Effect would expand their relief operation to take in the Western Province. “The three-way conversation is now leading to many other conversations and opportunities for what we will be able to do together,” Vermaele said.

Another example of partnerships: in most of the 82 or 83 markets where Starbucks has stores, it doesn’t operate the stores itself, but has a local subcontractor. The foundation has been working with the subcontractors on a giving partnership. They asked the partners to nominate nonprofits, stipulating that if the foundation gave money, the local partner would have to contribute in some way, maybe by providing volunteers, or communications, or matching donations.

They now have more than 60 of these partnerships, dealing with more than 120 grants totaling about \$7 million. And the partners are stepping up. “Last year we went from 5-1 donor match, to a 3-1 donor match.”

- **An engaged future.** Ehlers would like to see more donors supporting organizations “to do the big audacious stuff, even though it might not work.”

*The three-way conversation is now leading to many other conversations and opportunities for what we will be able to do together.*

~ Alicia Vermaele



“There are circles of philanthropy that are really sophisticated about that, and I’d like to see those ideas spread,” Ehlers said. That kind of risk taking also means a closer relationship. “The truth is, the less restricted your funding is, the more you get to know an organization in its entirety,” she said.

Vermaele shares the optimistic view. “I think we might see a shift from funding large-scale institutions to finding ways to direct to changemakers and grassroots hyperlocal organizations in the Global south.” Her favorite example is the United Nations Women’s Peace and Education Fund. Which has a great record of supplying funds and training to women involved in peace building.

“We know exactly the women that we fund in the DRC, and they are incredible women in coffee. Same thing in Colombia where there’s still... a lot of conflict and a lot of peace building that needs to happen.”

Kangai is also a fan of the United Nations Women’s Peace and Education Fund. “We want to see more funding for women and peace and security”, she said, “If women are in decision making power in peace building process, they will have more impact.”

Also, a need: more funding for initiatives led by women of color. “There is very limited or scarce funding for women of color-led initiatives globally and in the United States of America,” she said. The Global Fund for Women has a program, 1.9 Rising, for donors who would like to address that.

She would also like to see a greater public commitment by philanthropy to racial equality. Funders should have anti-racism strategies. “I have been in global philanthropy for two decades and I have not seen many conversations around race. There’s just an assumption that we do good work, so we are good people.”

*There is very limited or scarce funding for women of color-led initiatives globally and in the United States of America.*

*~ Rufaro Kangai*



## MORNING BREAKOUT SESSION

### The Role of Leadership in Localization



Bindiya Patel

**Bindiya Patel**, Co-director of **Global Leadership Forum**, challenged the panel and the audience to define that kind of leader. She asked the audience, using the app Menti, to name traits or skills that transformative leaders need to develop. They generated a word cloud. The biggest word in the cloud – most named by the audience – was “listening” followed by “empathy” and “humility”, and then followed by “vulnerability” and “vision.”

It’s clear that if we want to shift power and resources to local community, we need effective leadership.



Jenna Recuber

**Jenna Recuber**, Global Vice President for **The Hunger Project**, said she thought of the word “vision.” It reminded her of a volunteer leader she worked with in Chiapas, called Rosa Ruiz. In a region where women often face gender-based violence, Ruiz was able to organize a group of women that now run a women-owned cooperative. And it was Ruiz’s vision that made it happen. “That power of creating a jointly held vision really creates that space of possibility,” Recuber said.



Claire Gwayi-Chore

**Claire Gwayi-Chore**, Associate Director, Life and Health Sciences for **Gates Ventures**, talked about “power sharing” and “empathy.” She said that to share power effectively, you need to understand the complex ways it works. She cited political theorist Stephen Luke’s work on the “three faces of power:” decision making, ideological, and agenda setting. “When we think about power sharing, we often think about the first thing [decision making] but there are other ways to think about what power sharing is.”

**Suman Bhat-Kincaid**, Founder and Principal Consultant for **Sukara LLC**, picked the word “awareness:” awareness of power differentials and of biases. “We all have bias. What we need to do is have an awareness around what those biases are,” she said.





Suman Bhat-Kincaid

**Samara Andrade**, Vice President Strategy and Partnerships with **HCP Cureblindness**, talked about “vulnerability.” “It requires vulnerability to be a leader in any space, but particularly in this space and this time,” she said. She quoted the writer Brene Brown: “Our willingness to own and engage with our vulnerability determines the depth of our courage and the clarity of our purpose.”

Patel asked the panel: “How can we foster transformative leadership?”

Bhat-Kincaid said that when recruiting it was important to reach out well beyond usual networks, and to think beyond what’s in a resume or a cover letter.

She worked with someone who decided of a candidate: “There’s more to this than the cover letter and resume that I am looking at.” A little digging revealed a long history of volunteering, and advocacy for causes. The candidate ended up being a finalist for the position.

“You have to be willing to sometimes take a risk,” she said. However, if you see a risk, it is important to support a new hire with something like a peer coach.

Recuber said it was important to have an inclusive culture. When coming up with their five-year plan, her organization included all their teams around the world, using Google Classroom to keep the documents available to everyone. It took a lot of work, but it allowed leaders from all over the organization to speak out and engage with each other. “It was a really beautiful thing,” she said. “We had staff from all over speaking, and they embodied the strategy.”

Gwayi-Chore called for finding and following a purpose. “What is your North Star? What is the thing you want to transform?”

She likes to think about a quote from Arunthati Roy, “There’s really no such thing as the ‘voiceless.’ There are only the deliberately silenced, or the preferably unheard.” She thinks about that often as she works to bring in diverse voices to shape Gates Ventures’ work on global health. Keeping her “North Star” central helps her build



Samara Andrade



*It requires vulnerability to be a leader in any space, but particularly in this space and this time.*

~ Samara Andrade

endurance, she said. “As you build that endurance you start to be more comfortable ceding power.”

Andrade called for an awareness of what she calls “personal space.” “It’s always about who’s in the room and what does the group want to talk about and study and learn.” It’s paramount to make room for multicultural perspectives, and for headquarters to cede authority to people working in far-flung offices, and for everyone to be able to work their best.

“How can we think about creating that kind of space that everybody needs to create their path forward?” she said.

Patel summarized: “It’s all about the connections.”

Then the audience broke into small groups to talk about transformative leadership skills, and how they work in their communities.

**Book and podcast list.** Participants suggested a variety of resources. Below are the books and podcasts. You can find the complete list of resources on [Mentimeter](#).

## BOOKS

- **Dare to Lead:** Brave work. Tough Conversations. Whole Hearts, by Brene Brown
- **The Culture Map:** Breaking through the Invisible Barriers of Global Business, by Erin Meyer
- **The Wisdom of the Bullfrog:** Leadership Made Simple, by William H. McRaven
- **The Book of Joy:** Lasting Happiness in a Changing World, by the Dalai Lama, Desmond Tutu and Douglas Carlton Abrams
- **Decolonization:** A short history, by Jan C. Jansen and Jurgen Osterhammel
- **Winners take All:** The Elite Charade of Changing the World, by Anand Giridharadas

*It’s always about who’s in the room and what does the group want to talk about and study and learn.*

- Samara Andrade

- **The Culture Code:** The Secrets of Highly Successful Groups, by Daniel Coyle
- **Education of an Idealist:** A Memoir, by Samantha Power
- **Think Again:** The Power of Knowing What you Don't Know, by Adam Grant
- **The Coaching Habit:** Say Less, Ask More & Change the Way you Lead Forever, by Michael Bungay Stanier

### PODCASTS

- **Your Unapologetic Career,** with Kemi Doll
- **Awake at Night,** with Melissa Fleming
- **On Being,** with Krista Tippett
- **Unlocking Us,** with Brene Brown
- **Dare to Lead,** with Brene Brown
- **Throughline**
- **Goalmakers,** by GlobalWA

## MORNING BREAKOUT

### Philanthropy and Funders Based Outside the U.S.

Funders don't just come from the U.S. For example, Southeast Asia boasts a growing number of philanthropists, foundations and government agencies, said the moderator, **Mark West**, Southeast Asia Senior Director for **Landesa**. West talked about a phone call with funders in Singapore with an interest in supporting projects in Vietnam, Singapore and Thailand. "I realized there is an ecosystem of funders that is starting to grow and mature, and funding should align with the maturation of this ecosystem," he said.



Mark West

**Devindra Chainani**, Co-President of the Seattle chapter of **Pratham**, an NGO that works on education in India, said there were four kinds of philanthropy in India: retail philanthropy, corporate philanthropy, family philanthropy, and the New Gen.

The New Gen are data-driven and open to partnerships. "The New Gen offers more than treasure. They also offer time and talent, and are used to scaling up their enterprise," Chainani said.

**Juan Robalino**, Climate Change and Land Tenure Specialist for **Landesa**, said Landesa's work to support coastal populations and preserve mangrove forests in Southeast Asia attracts support from a variety of sources, including Korea, USAID, and the Norwegian Agency for Development Cooperation. All of these groups have different perspectives and interests.

"The first step is to understand the priorities of the different donors and institutions, the country politics. Funder A might be interested in infrastructure, so the proposal we work on will emphasize infrastructure. Funder B is interested in developing the



Devindra Chainani



Juan Robalino

agriculture sector to create value, so we would be looking at developing value. We also want to look at local partners to develop and implement the process or project.”

West agreed. “For example, the US is interested in value chains, whereas Korea is interested in infrastructure. Climate change as a significant sector for Norway and the Netherlands,” he said.

Robalino said that uniting these different interests is a larger trend of wanting to support local communities affected by the climate crisis. “I’ve found that the nexus between climate adaptation and community resilience is gaining attention. Donors, including regional governments and international bodies, are increasingly recognizing the importance of funding projects that empower local communities to withstand environmental challenges,” Robalino said.

The diverse funders also have an increased interest in working together, said **Dylan Hannafious**, Grants Manager for the **Snow Leopard Trust**.

“I’ve seen a promising trend in the collaboration between nonprofits, tech innovators, and governmental agencies. Leveraging advanced technologies such as satellite imaging and data analytics, these partnerships are enhancing our ability to monitor and address environmental challenges,” Hannafious said.

The Snow Leopard Trust has developed leadership teams in all five of the Asian countries where it works. This is where the decision-making is. Increasingly, these local teams attract their own funding from the global north and the global south. “Folks are interested in giving money to local teams that understand the local problems and can develop local solutions,” Hannafious said, adding that the role of the central office is to support these leadership teams. “In some ways we would like to work ourselves out of a job. It’s about moving the agency and decision making and developing relationships.”

And some of the local individuals have international clout, for example, Mongolian conservation activist Bayarjargal Agvaantseren. “By her own merits, Bayar can access international funders who want to see local experts, with a track record of



Dylan Hannafious

*Folks are interested in giving money to local teams that understand the local problems and can develop local solutions.*

~ Dylan Hannafious



achievement, do this work,” Hannafious said.

Funders from the global south tend to be less wary than their northern counterparts, when it comes to the perception of risk in locally-led initiatives. New Gen funders, in particular, are open to localization, Chainani said.

*Folks are interested in giving money to local teams that understand the local problems and can develop local solutions.*

~ Dylan Hannafious

”



## MORNING BREAKOUT SESSION

### Trust-Based Philanthropy: Pangea Giving



Anne Sivley

This session was an in-depth look at a giving circle dedicated to trust-based philanthropy: Pangea Giving, which recently became a program of GlobalWA. Pangea's members pay \$1,500, or \$2,500 per family to support annual grants to local organizations in Southeast Asia, Africa, and Latin America. Grants range from \$5,000 to \$10,000 annually and continue for terms of about five to seven years.



Khaing Zar Oo

Here are the steps: after making a mutually agreed upon memorandum of understanding with the local organization, Pangea issues an initial project grant. Site visits, Zoom meetings, and six-month project reports are typically required. The idea is to make a long-term commitment.

"Relationships last decades," said **Anne Sivley**, a **Pangea Advisory Council** member and member of the giving circle. The role of Pangea is to support local agencies in their own goals. "We follow, they lead," Sivley said.

**Dr. Khaing Zar Oo**, who goes by "Nge Nge," is a representative of one of Pangea's partner organizations, the **Shanta Foundation** in Myanmar.

Shanta has partnered with Pangea for six years, with a focus on building leadership capacity, health improvements, and infrastructure. They began a project to train eighteen farmers to grow ginger as a cash crop. After participating, each farmer then trained another farmer. Now, 36 farmers grow ginger to increase their income, and are continuing training. Other projects have included women's empowerment, pig farming, and reproductive health education.

Shanta created savings groups for women, and women from these



Paul Silver

groups have taken on managerial roles and attracted more women to join. The relationship with Pangea has helped Shanta grow, Nge Nge said. “Grassroots organizations want real partners for resource support, feedback, and suggestions for organizational development.”

The flexibility and close communication of the partnership has helped Shanta adapt to turbulent times in Myanmar and the stresses of the COVID pandemic. “If you support the local network, you enhance the emergency responsiveness,” **Pangea Advisory Council** member **Paul Silver** said.

The support also made it easier for Shanta to be able to fulfill reporting requirements and secure funding from other sources.

Pangea is a [new program](#) of Global Washington and is welcoming new Pangea members. The speakers spoke to several interested people in the audience and said there is more information about membership on the GlobalWA webpage.

*Grassroots organizations want real partners for resource support, feedback, and suggestions for organizational development.*

~ Khaing Zar Oo



## MORNING BREAKOUT

### The Future of Work, Investments and Funding Capacity Building

In this panel on the future of work, four representatives of nonprofits talked about the challenges of building local economies to fight poverty.

**Upaya Social Ventures** makes investments in India to create jobs for people living with extreme poverty. Local enterprises are essential – some 60 percent of jobs created in the global south come from small and growing businesses. Upaya makes a point of supporting inclusive jobs, with work paths, said **Kate Cochran**, CEO of **Upaya**. “The future of work is inclusive. Everyone deserves the right to a dignified life.”



Kate Cochran

People who watch the economy of India talk about the “missing middle.” Most people work in either very tiny businesses or huge corporations, with not much in between. Upaya hopes to remedy that by nurturing small businesses to grow. “The kinds of investments we are making can be the bridge between the missing middle and investors seeing a worthwhile company,” she said.

Opportunity International works on growing and investing in the global south through microlending, training, and enterprise. They are interested in helping people, particularly smallholder farmers who are living with poverty, and through education, in ending the cycle of generational poverty.

Increasingly they use digital tools to help that happen, said **Greg Nelson**, Chief Technology Officer at **Opportunity International**. The new AI tools hold a lot of promise, he said. “Generative AI... is such a democratizing force for the work we do. The level of literacy and digital fluency in communities we work in is low... we



Greg Nelson

have been experimenting using this AI to work with farmers. Farmers can speak to their phone and get a direct answer from that phone.”

Still, the main work of Opportunity International will always be about human contact and creating relationships. Much of the contact with clients is done by agents equipped with an Android phone and a bicycle. “Technology is not a what but a how...” he says. The main objective is to create a network of trust.

The **Sehgal Foundation** focuses on building the capacity of rural communities and grassroots nonprofits. Among their initiatives are research projects in collaboration with smallholder farmers to try and increase yields.

Agriculture is central to their efforts, said **Devika Batra**, Manager, CSR and Funding for the foundation. “About 50% of the job opportunities in a nation like India come from agriculture. There is a lot of hope and opportunity in focusing on farming sector and bridging the gap between technology and traditional practices,” she said.

India’s current boom in computer-related technology is not necessarily good news for the rural communities the foundation serves. Young people leave rural areas to pursue jobs in the cities, and meanwhile the technology being developed is designed for big agricultural businesses, and not for smallholder farmers.

Batra said that for too long, funders from the global north and urban centers tried to tell rural communities in the global south what to do without knowing the communities, and their needs. Now there’s a greater awareness that people in the rural global south can articulate their own needs.

The **Global Mentorship Initiative** (GMI) works to connect recent college graduates with jobs by giving them mentors. The rise of remote work could help many people around the world, said **Jon Browning**, founder and CEO of GMI. “If there is a good thing that came out of the pandemic, opportunities for someone to work anywhere did not previously exist pre-pandemic,” he said. Even though more and more jobs can be done remotely, many global graduates struggle to get job access.



Devika Batra



Jon Browning



## 2023 GLOBAL HERO AWARD

### Pat Garcia-Gonzalez



Pat Garcia-Gonzalez

Global WA board member Melissa Merritt, founder of GlobalCitizen, presented the 2023 Global Hero Award to **Patricia Garcia-Gonzalez**, co-founder of **The Max Foundation**, which supports treatment for cancer patients globally. “This really does represent a lifetime of work and passion,” Merritt said. “Pat, you are a beacon of hope when it comes to fighting cancer.”



Melissa Merritt

Since 1997, the foundation has reached more than 100,000 patients in 77 low- and middle-income countries. Garcia-Gonzalez started the foundation after her stepson, Max Rivarola, died of leukemia at the age of 17 in 1991.

Pat reflected that when a loved one dies of cancer “...people react in two different ways. Some people never want to hear the word cancer again, and never want to walk into a hospital, and then there are those like us who honestly could not accept that that was over. There had to be more to this story.”

Very early on, the Max Foundation received an email on behalf of a man named Raul, from Honduras, who had the same cancer Max had. There was a promising new drug in development and Raul’s family wanted to help him access it. When new cancer drugs emerge, they are only available in higher income countries.

They reached out to the drug manufacturer on Raul’s behalf. That was the beginning of a mission to help people like Raul. The foundation now partners with seven other companies to bring new cancer drugs to people in low- and middle-income countries. (Raul is still alive and still getting treatment. He is happy and taking care of his family.)

Garcia-Gonzalez told four other patient stories, starting with a young medical student she met in Addis Ababa in 2011. He had

cancer, and the foundation helped him get treatment. He decided to become a hematologist, a doctor specializing in diseases of the bone marrow and blood. At the time, there were only two hematologists in Ethiopia. They created a residency program for him, and he's now the director of a hospital hematology department in Addis Ababa and is married with kids.

Garcia-Gonzalez said the foundation's achievements are the result of a staff with connections around the world. In particular, she recognized "These four women have been with me for the last 20 years, Viji Venkatesh from Mumbai, Catherina Scheepers from South Africa, Mei Ching Ong from Kuala Lumpur, and Inés García González from Buenos Aires, and we have built this thing together."



## LUNCH KEYNOTE

### Radha Friedman

**Radha Friedman's** lunchtime conversation with **Suman Bhat-Kincaid** took on a common problem: work burnout and what those of us in the global development community can do to support each other. "Raise your hand if anyone has experienced burnout," she said, and hands went up around the room.



Radha Friedman

Friedman drew on her own experience as a fundraiser and her work trying to help others to write her book, *Fundraising without Burnout: Radically Reimagining Philanthropy to Transform Your Impact*. She said burnout is reaching "an all-time high" with 80 percent of employees feeling emotionally alienated from work, and one in four of them with severe burnout.

A joint Compass Point and Haas Jr Fund survey of more than 2,500 development directors and executive directors found a dire situation: "The development director position had basically become a revolving door." Vacancies were frequent, candidates were hard to find – or at least candidates who could live up to the outsize expectations attached to the job – and those in the job often found little in the way of structures or people to support them. About 80 percent of employees in development roles are women, but senior leadership is 80 percent men, Friedman said, so many women feel obstacles to advancing.



Suman Bhat-Kincaid

The average stay of a development director is 18 months. As a former fundraiser, Friedman understands the grind.

"I scaled my own Mount Everest. I helped my organization bring in more money than they had ever seen, we 4Xed our budget, we opened multiple new offices overseas, we won all of these prestigious awards, but instead of feeling successful for raising all of these funds, I was the most exhausted and miserable that I had ever been."

Friedman wrote the book to make it extra clear people understand that the reason for the burnout isn't because they aren't good enough at their jobs. "We are working to change inequitable and oppressive systems from inside oppressive systems, and those systems are not designed to help you out, they're designed to make it so difficult to change the status quo that eventually you just become exhausted, and you burn out and you give up."

The book took shape in the past few years, when Friedman, now an independent philanthropic advisor, started doing some coaching, and heard again and again about feelings of burnout. "Every single person that came to me shared the same feelings of impostor syndrome and they thought it was them." The book is a way to break the silence and bring the conversation into the public. "I never hear this discussed in any conference that I attend, and yet everyone is talking about how burned out they feel."

Bhat-Kincaid said that in her consultant work she has had many of the same kinds of conversations. "I'm working with development leaders who are often a sole development leader in an organization where they're trying to raise \$1.5 million, and they're trying to wear so many hats and it's so much," she said.

Friedman said after giving up on being a fundraiser, she pivoted to become a grant-maker. "Once I stepped on to the other side of the table, where I was making the decisions about where the grants were going to go, I completely understood why I had burned out."

She advocated for creative projects she loved, sometimes for small woman-led organizations that had never had a grant before. "The other decision makers around the table would say 'Mmm, that seems pretty risky,' and instead they would say 'I would like to fund this proposal because this guy just reminds me of me when I was younger,' and most of those other decision makers around the table tended to be pale, male, and Yale."

Her entire career she had been trying to generate resources for gender equity, and women and girls of color who receive less than one percent of global philanthropy. "The whole time I had interpreted that as my failing, that I couldn't get more funding and investment and social capital into this field, when it's a system and sector issue." So, she switched careers again to become an advisor

*Once I stepped on to the other side of the table, where I was making the decisions about where the grants were going to go, I completely understood why I had burned out.*

~ Radha Friedman





between funder and nonprofits, to advocate for a better system.

Bhat-Kincaid said that as a woman of color, the pressures are more complicated. There are roles created by “a white dominant capitalist environment,” and not conforming to them can feel like a failure. “You internalize those things as failings of your own, and you don’t realize that there’s a system that does not support the way that you think, the way that you choose to build relationships, the way that you interact with this world.”

It’s important to talk about these things and bring them into the open, Friedman said.

She believes three things are behind the current boom in burnout.

- 1. A tendency to place blame on individuals, particularly development directors.** “We treat this as a ‘you’ problem. You just need better work-life balance, you just need to take a yoga class, you just need to lean in, girl.”
- 2. Not enough support for fundraisers.** “It takes time to build relationships. Relationships are core to being a successful fundraiser, and if people are in and out of there in 18 months, we’ve got work to do.”
- 3. Not bringing the issue to the attention of donors.** “We tend to be having conversations in totally separate rooms from our funding partners.”

Bhat-Kincaid said an active, engaged funder can help a lot. She knows of a funder who doesn’t ask for formal reports, just regular conversations. “So, you’re not scrambling to do the 15 spreadsheets and the giant dropbox.”

Friedman said that burnout is both treatable and preventable – if you are aware of the issue and catch it in time. “Within a couple of months, you can reverse it. If you don’t address it though, if you just keep pushing through, if you just ignore it, it’s like any other pain in your body. It can take two to five years to recover.”

*If you don’t address it though, if you just keep pushing through, if you just ignore it, it’s like any other pain in your body. It can take two to five years to recover.*

~ Radha Friedman





## AFTERNOON BREAKOUT

### The Localization Imperative – Shifting Power, Ceding Voice?



Mariam Zameer

This panel looked at two different perspectives on the challenges of localization.

**Mariam Zameer**, Director of the Health Systems Global Technical Team at **VillageReach**, said her organization doesn't have offices in every country where they work, but instead partners with other organizations, and supports them as they do the work. The main point is to maintain a focus of basing power and decision-making locally. "For us, localization is thinking about intent," she said.

While the organization has an office in Seattle, and its president works there, the other three members of the executive team are based across Africa. So is most of the global management team. Zameer said that with its mixture of offices and partnerships, it can be hard to explain VillageReach's structure and say whether it's actually a local or a global organization. "VillageReach thinks of itself as an INGO that is globally connected and locally driven," she said.



Walter Kerr

In order to build capacity and strengthen local organizations, NGOs should shift their identities, thinking of themselves as a chapter in a story, not a whole book, she said. And they should put a priority on training the people who can replace them and form the next chapter. This is hard work though, and many NGOs are not set up for this kind of capacity building. Still, if global offices ask their country offices and their local partners what they need and support them, it's the start of a relationship.

**Walter Kerr**, the Co-Founder and Co-Executive Director of **Unlock**

**Aid**, said his organization came out of a research project. “Unlock Aid was started really from trying to understand what are the biggest barriers to organizations accessing federal aid.” The aim is to connect frontline organizations with direct funding. And they face a number of barriers to federal aid. It is so difficult to apply that most local organizations don’t try, and those that do try do so only as subcontractors of bigger players, who may cut them out. The way things are now, the federal aid system is more destructive than helpful, he said. Most foreign aid benefits U.S. companies by acting as a supply chain delivering materials from the global north to the global south. It doesn’t build up economies in the countries it is supposedly helping, Kerr said.



Kirsten Gagnaire

The question of how to provide accountability is something that often comes up when talking about moving decision-making to local organizations. **Kirsten Gagnaire**, Founder and CEO of the **Kati Collective**, the moderator of the panel, asked the audience and Zameer and Kerr for suggestions.

One audience member suggested that program officers should provide stories of their impact. Another suggested funders should try and do more site visits, if they could do that in a way that doesn’t impact the work. Another said that the funders should be held accountable too, not just local organizations.

Zameer said that current standards of accountability come from a very American perspective, which means that obtaining funding often depends on being able to speak and write English.

Kerr said one fix for federal grants would be to encourage the government to invest in foundations with proven track records, and good ratings from those that fund. The government could move money quickly, and the foundation could work with local partners.

## AFTERNOON BREAKOUT

### Sharing Power and Influence: Collaboration for Effective Partnerships

Three very different large-scale funders talked about their experiences working and sharing power with local organizations. Moderator **Megan Nykyforchyn-Clark**, Senior Director, New Business Development for **The Hunger Project**, started off the conversation by asking the panelists about their philosophy of sharing power with partners, and the conversation continued from there.



Megan Nykyforchyn-Clark

**Danielle Pearl** is Evidence and Learning Lead for **USAID's** Locally Led Development Initiatives. She is part of trying to achieve USAID's target of putting 25 percent of its budget into locally led development. The philosophy, Pearl said, relies on co-creation and intentional collaborative design. Pearl said that when working with local partners, it was important to reduce the friction that results from the power dynamic, and to look out for barriers in USAID's procedures that keep some local organizations from seeking to engage.

She said that relationships with small local organizations need to be on a long-term timeline. Taking a more flexible approach means that USAID has been able to fund in areas they had never approached before. Sometimes they use sub-granting through an intermediary to support very small community organizations without subjecting them to USAID paperwork. The locally led projects now are a starting point as USAID figures out how to best work with community organizations, she said.



Danielle Pearl

**Robert Hokanson** is Senior Manager of Global Priorities, Humanitarian Services Division for the **Church of Jesus Christ of Latter Day Saints**. He said the church works from a standpoint of organizational humility, knowing that the church has something to



Robert Hokanson

give, but that real solutions will take community knowledge. “Donors cannot dream of the solutions that communities know will work,” he said. So, it’s important to go in with flexibility and an attitude of basic respect, seeking not to fix things, but to empower people.

He said donors also need to be conscious of where competition for grants can keep local organizations from sharing information with each other and should try to use their influence to encourage cooperation. Both partners should work together to figure out what success means and looks like, he said.

**Roman Nelson** is Strategic Partnerships Manager, Airband Initiative, for **Microsoft**. He said Microsoft is aware it can’t achieve its goals for human betterment without its local partners. He said it’s important for donors to be aware of the power dynamics at play, and to come ready to be flexible. Funders also need to be better at cooperating amongst themselves, he said.



Roman Nelson

It’s also important to avoid giving small organizations requests for too much data. A single metric or a few numbers should be enough.

At the request of organizations, Microsoft is also able to provide non-monetary support from within the company.

*Donors cannot dream of the solutions that communities know will work.*

~ Robert Hokanson



## AFTERNOON BREAKOUT

### The MacKenzie Scott Grant Recipient Experience



Ankita Patel

Over the past three years, MacKenzie Scott has given more than \$16 billion dollars to more than 1900 organizations. It's shaking up the world of philanthropy, not only with the amount of cash, but with the conditions of the grants: once she decides to give to an organization, the organization can do with the money as they wish. For nonprofits used to tight budgets and funding project to project, this kind of generosity means a radical shift. This session was moderated by **Ankita Patel**, Director of Collaboratives for **Panorama Global**.



Elaine Gibbons

**Elaine Gibbons**, Chief Impact Officer for **Panorama Global**, gave opening remarks and talked about Panorama's work with nonprofits, researching the impacts of the grants, and comparing strategies for using the money.

**Jennifer Crouch**, Director of Development for **VillageReach**, an organization that works on health care, mostly in Africa, said staffers were stunned when Scott gave them a grant in 2022. "We were honestly quite shocked when we got the grant...You are not prepared for a gift that size."



Jennifer Crouch

In order to decide how to use the money, they had to take stock of their organization. "We ended up looking at where are the barriers and where were the silos holding us back as an organization." Some areas did need help. "We realized that our operations were incredibly lean," she said. VillageReach decided to put some of the money into a rainy day fund, and then then set up an investment request process, with each team asking for money to do specific projects.





Chris Jochnick

**Chris Jochnick**, CEO and President of **Landesa**, said that the grant caused a similar shock, and a similar taking stock at his organization. “It gave us a chance to look inward and think of where we wanted to get to.”

After discussions over six months involving the whole staff and the board of directors, they came up with a plan. There were four buckets:

1. Making the organization stronger and more sustainable.
2. Moving leadership to the countries where they were working.
3. Starting an “opportunity fund” in order to put in action the best investment ideas of staff and funders.
4. Building the field, by measuring the impacts of Landesa’s work on land rights and educating funders about why land rights are important.

**Margarita Mora**, Senior Managing Director, Partnerships for **Nia Tero**, said their grant gave them a chance to fix up their organization, updating its technology and operations, and to give more money to the indigenous-led organizations that are Nia Tero’s partners.

The moderator, **Ankita Patel**, Director of Collaboratives for **Panorama Global**, asked “What are some unpredicted challenges that you faced?”

There are a few, Jochnick said. One was managing expectations of staff and board members, because the new money is not going to pay for everything everyone wants. Another is sticking to the plan. “It’s almost tempting to plug budget holes that aren’t necessarily the best way to spend it,” he said. Another is to make sure that growth happens at a manageable pace. And finally, there’s the question of what you say to other donors. Landesa argued that they were able to take donor dollars further because they could leverage some of their own funds.

Mora said her organization had similar conversations with other donors. “There’s this misinterpretation that you are set, and why



Margarita Mora

would you keep raising more funds?” And it’s annoying to hear misconceptions about the Scott grants, such as that the lack of restriction on the money means it is given randomly.

Nia Tero answered a lot of questions when applying for the grant. “There’s a pretty thorough vetting process.” And Scott grants recipients deserve other funds as well. “It is not by chance that all these organizations received the funds, but because we are doing a really good job.”

Crouch said the board of VillageReach worried about whether other donors would melt away when the Scott grant arrived. That hasn’t been the case, she said. “Most of our donors, their question has not been ‘Do you need this money?’ They actually said to me ‘Do not get complacent. Please be smart about this,’” she said. The donor, who had been VillageReach’s biggest unrestricted donor before the Scott grant, asked to see the organization’s strategy for dealing with the money. “We had a three-month delay while we figured that out.”

Crouch said the changes the money brought, and new people coming in, caused some confusion about roles and responsibilities, “a bit of internal friction.”

Patel asked the panel for their idea of transformative philanthropy.

Mora said that when Nia Tero funds local indigenous partners, it’s about building relationships and organizations that are sustainable. “Remember that money is a means not an end,” she said.

Jochnick said that one part of how philanthropy needs to be transformed is shifting the power differential between donors and recipients. Another part, for Landesa, is its impact on local partners. “How we do our work that also strengthens the rest of the people working on this issue.”

*It’s almost tempting to plug budget holes that aren’t necessarily the best way to spend it.*

~ Chris Jochnick

## FAST PITCH

GlobalWA's annual Fast Pitch contest had seven representatives vying to give the best pitch for their organizations. Each was given two minutes to present their organization and talk about what makes an effective partnership between funder and recipient in philanthropy.

**Jon Browning** is the CEO of **Global Mentorship Initiative**. Colleges around the world nominate students, who work with mentors on a short-term, online mentorship to help them get their first jobs. Over three years, the initiative has grown to serve more than 5000 students in 92 countries, including eight refugee camps in the Middle East and Africa. Seventy-four percent of students have a job within six months.



Jon Browning

**Peter Kelly**, President and CEO of **Grow Further**, talked about how his organization helps smallholder farmers by nurturing research. In Ghana, they are working on a commercial variety of Bambara Groundnut, a nutritious, climate friendly crop that has been neglected by traditional agricultural research. "This is a \$133,000 project that aims to reach millions." Grow Further hopes to inspire a sector of food research charities to make a more food-secure future.



Peter Kelly

**Laura Baerwolf** is COO of **Mona Foundation**, which has a 24-year history of partnering with grassroots organizations to focus on education and girls' empowerment. It has partnered with 53 local organizations in 24 countries. Last year Mona helped about 1.7 million students for under \$3 million.



Laura Baerwolf

**Paul Essene** is Head of Product and Innovation at **Opportunity International**, which aims to end extreme poverty through micro-banking, education and agriculture. He talked about Faustina, a smallholder farmer working about an acre of land in Malawi. Opportunity International helped her by creating an AI chatbot on WhatsApp that provides agricultural information.

**Carrie Schonwald** is Director of **Providence Global Programs**. Providence is one of the largest Catholic health care systems in the U.S. In its global programs it aims for health equity by partnering with NGOs and health agencies. For example, in Malawi it works with Kamuzu Health Sciences University in infrastructure and education so they can train more physicians.

**Donna Schively** is President of the U.S. board of **Save Kids Trust**, which provides medical care for impoverished children and families in India. It serves more than 15,000 people a year. It serves children and mothers through street clinics, referring those who need more attention to its three brick and mortar clinics. It plans to build a fourth clinic in Jaipur.

**Kathleen Davis** is a board member of the **Worldwide Fistula Fund**. The fund develops long-term relationships with fistula surgeons and local “champions”, who they mentor to create programs in their own countries to combat the disabling birth injury. They have trained more than 1,200 fistula surgeons, nurses and physical therapists. They have performed more than 5,000 free surgeries and started 480 survivors on new businesses.

The people’s choice winner was Kathleen Davis of the Worldwide Fistula Fund. Kathleen won a free ticket to the Goalmakers 2024 Conference.



Paul Essene



Carrie Schonwald



Donna Schively



Kathleen Davis



## AFTERNOON plenary conversation

### How to Create a Program with a Funder



Jennifer Butte-Dahl

Moderator **Jennifer Butte-Dahl**, Senior Director, **APCO Impact**, said she aimed to highlight information that people can use when doing their own co-creation projects. Changing the philanthropy model is “multi-layered,” she said. “We’re talking about transforming structures, and roles, and mindsets, and leadership styles, and systems and processes, and I think if we want to effectively act on the buzzwords we love to throw around, we need to get really specific about what we mean.”

This conversation was all about the details.

First: a definition of co-creation, and what it requires.



Surita Sandosham

**Surita Sandosham**, CEO of Heifer International, said her organization has a broad mission to fight hunger and poverty and care for the planet. This calls for an approach that has all stakeholders actively collaborating on strategy and values. “It’s about bringing all of the different voices. It’s a mindset. It’s a way of being and it’s a methodology that we think is critical if we want to have the kind of impact that we want to see with smallholder families eventually getting to a sustainable living income.”



Atul Tandon

**Atul Tandon**, CEO of **Opportunity International**, said there are two components to his organization’s approach: Opportunity International’s mission, “who are we and what are we about,” and the client’s needs and desires. Opportunity International believes in working with people to help them build sustainable livelihoods. “We give a hand up, we don’t give a hand out.” This means giving financial resources, training, and support.

The first client, in 1971 was Carlos Moreno, who was selling raw



spices on the streets of Kali, Colombia. Opportunity International's founder, Al Whittaker came up to him and struck up a conversation, asking him "What do you need to do better in life?" Moreno's answer: a spice grinder. Once they know the client's needs, the next step is finding resources within the local economy that can help, such as a local bank or a nonprofit. "Co-creation does by definition involve all those parties."

Butte-Dahl asked for a show of hands of people in the audience who had been involved in co-creation projects. Then she asked how many of those projects went well. About a third of the hands went down. That's to be expected with co-creation, she said. "It's a journey. We don't get it right on the first time. It's an intricate process to get it right."

Then it was time for specific examples.

Tandon talked about Opportunity International's work with Visa. Visa approached them with the objective of providing financial help to women building businesses and it took a while to settle on the best clients. Opportunity International wanted to focus on people living on less than \$2 a day. Visa wanted to focus on the working poor. After long deliberation, they settled on three less developed countries: Ghana, Uganda, and Nigeria. Then they had to decide what kind of form the assistance would take, and settled on loans. That meant they needed local banks to be involved. But, local banks didn't want to be giving loans to extremely poor women without credit support.

They came up with a solution: Visa would provide guarantees. It turned out to be a powerful deal. "For every \$100,000 of funding they provide, a million dollars of loans could be given out. Ten times more," Tandon said.

But it took many meetings, emails, and conversations with all stakeholders to bring it to reality, and there were many details to work out on how the services would be delivered, and what technology was used. All the way along, Opportunity International kept the dialogue going between the client base, the banks, and Visa. Tandon said it was like carrying a baton. "Right now, the baton is with Visa, they've got a set of questions to answer. How do we answer it? It needs to pass to the partner, then it needs to

*It's a journey. We don't get it right on the first time. It's an intricate process to get it right.*

~ Jennifer Butte-Dahl

go to the client, then it needs to go back,” he said.

“It takes deep listening, deep empathy and at the same time an absolutely passionate focus on ‘We have to do the right thing by the client and get the right results.’ We will not stop until we figure that out.”

Sandosham talked about Heifer International’s partnership with MasterCard, providing financial and employment help to youth smallholder farmers in East Africa. She said it goes back to 2013 when MasterCard expressed an interest in supporting youth and Heifer approached them about working together. At first MasterCard turned them down. “We didn’t give up because we knew that they were interested in working with youth in Africa and so were we, and so we kept this ongoing conversation.” This conversation turned into a relationship. “Ultimately co-creation is about relationship building,” she said.

“  
*Ultimately  
co-creation  
is about  
relationship  
building.*

~ Surita Sandosham

Heifer had a grant from the Gates Foundation, working in East Africa on dairy farming. MasterCard knew about this and liked the model. So MasterCard approached them and proposed partnering. The project worked with 25,000 youth in Uganda and Tanzania, over five years ending in 2022. That experience shaped the current project. For example, the earlier project provided a revolving fund through a bank, but clients didn’t use it because the bank was too far away.

Another factor affecting the current project: MasterCard opened offices in Rwanda, so it became more locally-led. “We shifted our relationship from our donor relationship in the U.S. to our team in-country and that created the space to actually learn more about what was going on,” she said. Right now, they have a \$47 million grant from MasterCard for 250,000 youth in Uganda, with 70 percent of them women.

She said it’s important to go in ready to learn, and make new connections. Also, “It’s really important to say what you don’t know.” It took seven months of back and forth to shape the grant proposal. Next step is six months of deliberating the shape and the goals of the final five-year plan. “That will require engaging with community,” she said. “At the end of the day it’s how we are bringing all the partners together plus the youth.”

Sandosham said co-creation is never straightforward or easy, and it's unique to every situation.

Tandon said that to effectively co-create takes deep trust between all the parties, open communication, and an iterative process that circles back again and again.

In the early stages, it's about aligning mission, finding where the different players agree on overall goals, but once it gets to the practical end, "human-centered design," there's a shift. "We have to then intentionally work towards where the power dynamics really do shift to where we are listening more to the client than anybody else," he said.

*We have to then intentionally work towards where the power dynamics really do shift to where we are listening more to the client than anybody else.*

~ Atul Tandon

In Opportunity International's case, there would be at least four partners in the mix: themselves, funders, local financial services, and the clients. They are increasingly adding a fifth level: local people who are successful in the enterprises they are promoting, such as farming or business, and can act as master trainers. And, some situations call for a sixth voice: that of the technology provider.

Sandosham said the trust and the relationships allow for flexibility when things don't go as planned. "If something doesn't work, you can pivot, and because you've co-created, you can go back, and they can come to you, and you can go to them. You can problem-solve together." When it comes to the MasterCard project's aim of getting jobs for hundreds of thousands of youths, it's not going to go straightforwardly, and it's valuable to have the ability to make changes and adjustments along the way.

Butte-Dahl asked about major challenges.

Sandosham said that relationships with big donors often involve "relationship managers" based in the central office. "When you start to move that into country, our in-country folks aren't quite comfortable with those relationships." Her advice is to make sure in-country staff have relationships with the donor too and empower them to take the lead.

Tandon says at times funders say they want to co-create something, but really they have a model in mind and just want to


tweak it for a new project. It's important to be clear on what the funder wants, before going into an agreement. "You have to walk into it eyes wide open, what you're getting into."

Final question: is co-creation worth the trouble?

Sandosham says there is no other way to achieve the complicated goals of her organization. "We get to the impact that we want and ultimately the communities that we're supporting feel like they're getting what they want as well. You don't have a choice when you're dealing with complex issues."

Tandon said that with increased moves to co-creation and localization over the last five years, they are able to accomplish more with their resources. "In the past, for every \$100,000, we would put about \$500,000 of loan capital out into the marketplace. That has now doubled to a minimum of 10 to one. In some cases, we're getting as high as 15 to 20 to one."

With the increased use of local master trainers, their "people leverage" has also increased. "Our people leverage has gone from one trainer of ours training 25 clients to a local master trainer training 100 clients," Tandon said. It's a clear success. "It's well worth it, and go try it."



*We get to the impact that we want and ultimately the communities that we're supporting feel like they're getting what they want as well.*

*- Surita Sandosham*

## AFTERNOON KEYNOTE

### Technology, Data and AI for Nonprofits

**Akhtar Badshah**, of the **University of Washington**, opened the conversation by observing that the digital divide on technology has widened. “Now it’s an exponential divide, and we have the super-haves and the super-have-nots.” But nonprofits could help bridge that gap, he said.



Akhtar Badshah

**Cole Harvey**, a student of Badshah’s at the **University of Washington**, presented an analysis that looked at nonprofit leaders’ opinions of AI tools. The sample of respondents was “very positive,” he said. Most people liked AI tools and felt comfortable using AI tools, though they didn’t believe they should replace people. There was a recurring theme, Harvey said, “that AI tools must be used as copilots, not as replacements.”

The report also researched funders using an AI bot to search for nonprofits. The funder used “trigger words” to find groups of interest. A human still needed to be there to sort through the bot’s choices. For example, a search for women’s reproductive health organizations turned up one that met all the search words, but did not support abortion rights, which was important to the donor.

Some of the respondents were skeptical about whether it would be a good idea to use their limited budget on computing tools.

The report presented some ideas for future AI tools for nonprofits, such as a bot to help edit grant proposals, and compare them to a database of successful grant proposals.

**Lacey Stone**, Chief Development Officer for **USA for UNHCR**, gave some examples of how UNHCR is using new technologies. One innovation: drones to map informal settlements during crises. “Where are people who are fleeing gathering? Are there informal transit places where we can identify to know where to be able to deploy our resources to provide safety and protection?” In the big



Cole Harvey



Lacey Stone



picture, they are looking at AI systems to predict climate disasters “so we know how and where to preposition those supplies.”

USA for UNHCR has an innovation lab called the Hive. Stone, as Chief Development Officer, works with the Hive team on “propensity modeling,” using machine learning to evaluate funders. When the war in Ukraine started, the number of donors to the organization shot up, particularly in the \$1,000 to \$9,999 range. “That donor file essentially more than doubled in just a couple of months.”

There’s one person on staff who deals with the mid-level file, and tens of thousands of donors. The hope is to use the propensity modeling from the Hive team to sort through all those mid-level donors to flag which of them might be open to overtures to increase their giving and become major donors.

They are also using generative AI to do things like summarize reports, freeing up human staff time to build relationships and work with donors. (Stone said that of the reports they send, 80 percent are read by three total people.) “It doesn’t sound super sexy, but it’s one of the coolest parts of my job,” she said.

Badshah said a lot has to be settled about how AI is going to be used. “Right now, the people who are developing this are not thinking of us at all. We’re just an afterthought,” he said. “Where can we intervene and how can we help?”

Ideas about AI and ethics are coming from two places: the AI companies themselves, and governments. It’s important to get other voices around the world into the conversation, he said. “How can we create a community-led digital civil rights?”

*Right now, the people who are developing [AI] are not thinking of us at all. We’re just an afterthought.*

~ Akhtar Badshah



## CLOSING REMARKS

### Continuing the Conversation



Kristen Dailey

“When I draw the thread all the way through, it’s about us in this room, and it’s about relationships.”

She noted that sometimes it takes years to create those relationships, often through co-creation, to develop the best funder and recipient model. She encouraged everyone to continue the conversation, to continue engaging.

*This is about starting the conversation, not ending the conversation.*

~ Kristen Dailey



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