



A FOOT IN BOTH WORLDS

Working with Regional Organizations
to Advance Equity

EXECUTIVE SUMMARY

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Within philanthropy, conversations about equity are increasingly taking center stage.

Striving for equity means that everyone has a fair and just opportunity to thrive. This requires removing obstacles such as poverty, discrimination, and their consequences, including powerlessness and lack of access to good jobs with fair pay, quality education and housing, safe environments, and health care (Braveman, Arkin, Orleans, Proctor, & Plough, 2017).

For national foundations, working through and with regional organizations can advance equity in critical ways. Working with regional organizations can help national funders increase understanding of, relevance to, and connection with local communities and stakeholders, ground high-level systems change in the reality of people's lives, and create common cause among a set of stakeholders across multiple localities, bringing scale and sustainability to community change initiatives. In the best-case scenario, foundation investments in regional organizations can catalyze powerful ripple effects, such as developing local leadership, spurring economic growth, and building a stronger nonprofit infrastructure.

This paper seeks to inform national funders interested in more deeply understanding the opportunities to advance equity by working with and supporting regional organizations (as compared to local or national organizations). To do so, we reviewed the literature and conducted 20 interviews with national foundation executives who have worked with regional organizations as part of their strategy, as well as representatives from organizations working regionally, such as community development finance institutions, regional and community foundations, and community colleges. Based on the insights shared with us, we examine how working with regional organizations can advance equity, how national foundations can work effectively with these organizations, and the potential pitfalls and challenges of this work.

Working with Regional Organizations: Why it Matters

Getting close to the ground can be complicated and difficult for national foundations. They may not have relationships with local organizations, much less the local knowledge and expertise needed to engage in community problem-solving in deep, nuanced, and meaningful ways. Moreover, smaller organizations may not be able to work at the scale the foundation wishes to work or have the capacity to absorb the large grants that national funders typically make. Complicating matters further, when national foundations make grants to national organizations, networks, or intermediaries, intangible resources such as information may “trickle down” to local organizations, yet far-too-often, these grants fail to translate into direct investments, in the form of dollars or capacity, to local organizations.

Though getting dollars more directly to local communities and strengthening the connections between national and local work are essential to advancing equity, the reality is that it is often impractical for national foundations to work with numerous local organizations responsibly and sustainably. As foundations wrestle with how they can achieve meaningful impacts at the community level, working through regional organizations can serve as one strategy to advance equity by getting resources closer to individuals, communities, and institutions that have historically been overlooked.

For example, regional organizations can play the following roles as national foundations seek to amplify community-level impact:

- Provide insight and expertise on the region's political, cultural, social, historical, and economic context;
- Broker relationships with local players, and serve as a liaison to national organizations;
- Increase relevance of strategies, programs, data, and language for local and regional contexts; and
- Maximize impact and minimize unintended harm by serving as stable, trusted institutions that help build nonprofit capacity and local leadership, demonstrating a long-term commitment to the region beyond individual programs or initiatives by national stakeholders that come and go.

PROVIDING EXPERTISE & BROKERING RELATIONSHIPS

Regional organizations offer important insight and expertise about local and regional contexts and can broker relationships with local players. Regional organizations can help national foundations establish credibility and trust by ensuring that funders understand the political, cultural, social, historical, and economic context of their region, particularly complicated dynamics of power and race. By working with regional organizations, national funders can become more proximate to communities on the ground.

Regional organizations have the capacity to connect with national entities. Regional entities can act as a liaison between national and local organizations. Just as national foundations may not have the staff capacity and connections to engage local players effectively, local organizations may not have the human and financial capacity to plug into national work. Regional organizations can help local communities become more connected to the national landscape, including resources and networks that can strengthen local work.

Regional organizations can convene institutions within the region around common cause.

Regional organizations are well-positioned to convene different players into working collaboratives and coalitions within a geographic region, a role that can be out of scope and more challenging for a local entity to play.

INCREASING RELEVANCE OF STRATEGIES AND APPROACHES

Regional organizations can help identify issues, design strategies, and implement solutions that are relevant to local contexts. Regional organizations can provide valuable insights into community issues and how to address them in ways that resonate with local norms and values. In particular, regional organizations can help identify effective communications strategies and local messengers to increase the likelihood of community engagement and buy-in, crucial to ensuring an initiative's success.

Regional organizations can collect and share data that are relevant to local and regional contexts. Local organizations may not have the expertise or technical capabilities to collect, analyze, and interpret relevant data. At the same time, data at the national level may not be granular enough or packaged in a way to provide the nuance needed to assess community issues and track progress. Regional organizations can coordinate data collection and analysis and use the data to engage local actors in generating community solutions.

Regional organizations can help test policies and surface new and innovative solutions. Though many national foundations work at the federal level to affect systems change, it can be advantageous to work regionally to understand how national strategies play out on a local level. Working regionally creates an opportunity to address differing conditions and needs in various parts of the country, while also allowing leaders to test out and refine new programs or initiatives.

MAXIMIZING AND SUSTAINING IMPACT

Regional organizations can provide longer-term infrastructure and stability within a geographic context, even as national organizations come and go. Compared to smaller, local organizations, the size and scale of regional organizations mean that they often serve as stable anchor institutions. The strongest of these institutions can leverage their financial and human resources to serve as reliable partners for community change efforts over the long-term and provide strategic community leadership, resulting in broader and more lasting impact.

Regional organizations can help build nonprofit capacity and local leadership, creating a stronger local infrastructure for community-based organizations. To the extent that regional organizations are intentional about dispersing the investments made to them and developing nonprofit capacity, working with regional organizations creates opportunities to strengthen the broader social sector infrastructure. Regional organizations are also well-positioned to leverage multiple funding streams that can catalyze more interconnected strategies to advance equity and maximize longer-term community impact.

Regional organizations can bring a systems lens to their work and help catalyze collective action. Regional organizations are often better positioned than smaller, local groups to develop a macro-level analysis of issues and concerns that cut across multiple communities and sectors, and to secure funding to address those concerns. This lens can help generate and implement larger-scale systems solutions and longer-term policy changes.

How to Work Effectively with Regional Organizations

For national foundations, developing a strategy or aspect of work that includes regional organizations starts with finding the right entity — one who is trusted in the region, has strong relationships at the local level, and understands the culture of the region, among other considerations.

Although there may be compelling reasons for national foundations to work with regional organizations, the national foundation must assess its own ability and readiness to work effectively with regional organizations and support the work over time. This section highlights key considerations for effective work between national foundations and regional organizations.

EXAMINING FOUNDATION CAPACITY AND GOALS

Assess the foundation's capacity to support and engage with regional organizations. When considering work with regional organizations, national foundations should make careful decisions about the level (local, regional, or national) at which they should be working. Does the foundation have the human capital and other assets to engage effectively with regional organizations? And in what way do the grantmaking objectives call for such an approach?

Getting Started

For foundations considering work with regional organizations, a set of guiding questions can be found in the Appendix. Three sets of questions are provided — questions for foundations as they consider their strategy and approach; questions to assess a regional organization's fit with the foundation's strategy; and questions to assess an organization's commitment to equity.

Start where communities are — not where you want them to be.¹ The resources national foundations bring to the table create a power dynamic — one that can put regional organizations in a difficult position if values and priorities have not been fully articulated and understood. To foster sustainable change, funders should co-create strategies and approaches with their regional partners in a way that accounts for local and regional contexts.

Balance local and regional relationships. One reason national foundations work with regional organizations is to benefit from their community expertise and the ability to broker relationships with local actors. However, national funders with experience working with regional organizations caution their peers to be careful not to substitute relationships with regional organizations for relationships with local organizations.

ASSESSING POTENTIAL REGIONAL ORGANIZATIONS

Gauge the extent to which regional organizations have deep, authentic, and inclusive relationships with local communities. It can be tempting for national foundations to rely on a go-to organization, especially those perceived to have regional credentials (community foundations, national organizations with regional affiliates). Thorough due diligence may reveal that their relationship with the local community is not strong. Questions to consider as foundations seek to work with regional organizations include: Who does that organization work with and how? Where are their connections? Are they trusted by the specific communities that the funder seeks to reach with its investments? What's the nature of those relationships?

Be aware of regional organizations that act as gatekeepers or are in it for their own institution building or fundraising. Just as regional organizations can facilitate connections between local and national work, sometimes regional organizations can reinforce historic power structures and impede financial and information flows. In addition to thinking about how their grants will be structured to support both regional and local groups, foundations can help mitigate this dynamic by engaging in clear and honest discussions about roles and responsibilities, while also creating mechanisms for transparency around the equitable distribution of resources.

SUPPORTING REGIONAL ORGANIZATIONS

Support regional organizations to meet the growing and changing needs of their region and its communities. Like any larger, established organization, regional organizations can become comfortable with a particular way of doing things, but those that are the most effective are ones that are adaptive and responsive to shifting community priorities. Foundations can facilitate this process by encouraging nimbleness and adaptation. This includes engaging with regional organizations beyond a financial investment, providing access to networks, resources, and information to encourage ongoing innovation.

Encourage active learning and feedback loops in a way that supports work at the foundation, as well as the region and communities impacted by the foundation's investment. Working with regional organizations offers multiple learning opportunities. National funders can learn from regional partners, and vice versa. In addition, peer learning opportunities among regional and local organizations can spark a healthy exchange of ideas and catalyze new collaborations.

Invest in building the capacity of regional organizations. While regional organizations have the potential to build capacity at the local level, it is important to invest in strengthening the capacity of the regional organization as well. The foundation's support for regional organizations should include provisions for sustainability when the foundation is no longer there and to build this in from the beginning of the relationship.

¹ We credit Karl Stauber, former president and CEO of the Danville Regional Foundation, with this framing.

Conclusion

Regional organizations have the potential to play an important role in linking national and local players. For national foundations, working with regional organizations holds promise as a strategy for getting resources closer to community and for advancing equity.

Incorporating support of regional organizations into grantmaking allows national foundations to invest in regions or communities more directly and increase economic and human capital through support of local infrastructure and leadership, without pursuing a hyper-local strategy or long-term commitments to specific places.

Whether they are community foundations, community development finance institutions, rural development hubs, or other entities, regional organizations possess local knowledge and expertise to build community-based leadership, knowledge, and social capital. Coupled with the resources national foundations bring to the table, such relationships can spur more equitable outcomes in those communities that have experienced under-investment for far too long.

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Dr. Shah's career spans two decades in the academic, nonprofit, and philanthropic sectors. Trained as a clinical-community psychologist, her work has touched on a wide range of topics, including diversity, equity, and inclusion, urban education, community organizing, women's rights, youth development, disaster philanthropy, and the global water crisis.

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