

What's Next for Philanthropy in the 2020s

Seeing Philanthropy in a New Light

Gabriel Kasper, Justin Marcoux, Jennifer Holk, and Jeff Morshed

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Preface

In 2000, the Monitor Institute by Deloitte launched a multiyear, fieldwide project on the future of philanthropy. The culmination of that research, a report titled *Looking Out for the Future: An Orientation for Twenty-First Century Philanthropists*, explored emerging trends in the field and presented a vision for how philanthropy might better fulfill its potential.

Nearly a decade later, we were commissioned to update that report to explore the future of the field once again. The resulting essay and toolkit, *What's Next for Philanthropy: Acting Bigger and Adapting Better in a Networked World*, was published in 2010. It identified 10 critical “next practices”—emerging approaches that were seen to be a good fit for the way the world was changing.

Since then, we've also painted several additional, more focused portraits of philanthropy and the social sector: on the new opportunities and roles **community foundations** are playing in their regions; on the ways funders can seek out and support breakthrough **social innovation**; on the future of **measurement, evaluation, and learning** in the field; and on the transformative potential of **networks and aligned action**. And we've worked with some of the world's largest and most innovative funders to put these emerging ideas into practice.

In the midst of this work, the pace of change in the world has only continued to accelerate, creating many exciting pockets of experimentation with philanthropic models as both established foundations and new donors have pushed the boundaries of how we think about giving. So with support from Deloitte Tax LLP and the Robert Wood Johnson Foundation, the John D. and Catherine T. MacArthur Foundation, the W.K. Kellogg Foundation, and the McConnell Foundation, we launched an updated *What's Next for Philanthropy* effort focused on the 2020s to once again help foundations and donors in the United States and Canada reflect on the current state of philanthropic practice and explore new possibilities, models, and interventions for the future.

Since January 2020, we've interviewed more than 200 philanthropy executives, professionals, donors, board members, experts, and grantees and reviewed hundreds of articles and reports to develop a broad mosaic of perspectives from across the field.

And while our focus is primarily on philanthropy in the United States and Canada, we also spoke with a diverse set of informants from around the world, across six different continents, recognizing that, although North America has long been seen as a “net exporter” of philanthropic innovation, it is possible that it could become a net importer of new ideas from elsewhere in the world in the coming years.

We've found from our conversations that no one person can see everything that's happening in the field. But the breadth of our discussions allows us to hold up a mirror, reflecting both what is happening across philanthropy now and where the field might be headed.

The report that follows aims to help funders make sense of what is changing in the field and why it is changing. And we hope it can serve as a call to action and provide a set of resources for helping funders begin to reexamine the way they do their work in the years to come.

Seeing Philanthropy in a New Light

What's Next for Philanthropy in the 2020s



"When a storm subsides, the air is washed clean of whatever particulate matter has been obscuring the view, and you can often see farther and more sharply than at any other time. When this storm clears, we may, as do people who have survived a serious illness or accident, see where we were and where we should go in a new light. We may feel free to pursue change in ways that seemed impossible while the ice of the status quo was locked up. We may have a profoundly different sense of ourselves, our communities, our systems of production, and our future."

— Rebecca Solnit, "The Impossible Has Already Happened," *The Guardian*, April 2020¹

THE COMPOUNDING CRISES of the past two years—the health and economic emergencies of COVID-19, the widespread reckoning on racial justice, growing political polarization and violence, and the looming threat of climate change—have marked a watershed moment for the field of philanthropy.

Although philanthropy is often *insulated* from shifts outside the field by virtue of permanent endowments and limited regulatory and accountability requirements, funders have begun to recognize that they are no longer *immune* to responding to external changes. When the pandemic hit, many funders quickly launched

emergency response funds, increased their spend-out rates, relaxed grant reporting requirements, and converted programmatic gifts to general operating support. Their reaction shows just how quickly long-held norms of practice can change in a crisis.

Now social change leaders, inspired by Winston Churchill's often-quoted admonition not to let a good crisis go to waste, are working with a renewed sense of purpose and possibility. They're hoping to use the current disruption of the status quo as a way to rethink long-entrenched systems and practices. But as we look to emerge from the pandemic, the sense of

hope for fundamental change is accompanied by the countermanding inertia of a return to normalcy and the pull of old ways of working. The good news is that we may be returning to normal; the bad news is that we may be returning to normal.

At this transitional moment, the potential for accelerating change goes beyond just the social and environmental issues that philanthropy aims to address; it also applies to the practice of philanthropy itself. It remains to be seen whether many of the recent changes in philanthropic processes will continue after the pandemic, or whether they will simply snap back to the way they were before. But what if the postpandemic years could represent an opportunity for philanthropy to begin to more fundamentally reimagine itself and the role it plays in society—in ways both large and small?

- What if, for example, philanthropy tried to take on bigger issues, influencing large systems and cultural narratives like capitalism, democracy, and systemic racism, rather than more narrowly focused challenges?
- What if funders optimized more for agility and innovation and less on meticulous processes and closely defined outcomes?
- What if funders set up community “accountability councils” instead of “advisory councils?”
- What if foundations shared their endowments with historically marginalized populations to truly begin building assets in those communities?

- What if funders paired each of their direct service grants with related investments in advocacy and policy change?

The seeds of ideas like these are already starting to take root in the field. New funders are challenging traditional assumptions about the foundation form. Established institutions of all sizes, from the Ford Foundation to the Whitman Institute, are rethinking their strategies, looking for ways to share power and make their giving more “proximate” to the communities they serve. Funders from Los Angeles to Montreal are experimenting with political action—advocating for policy change that can guide the allocation of large pools of government dollars. And popular books like *Winners Take All*, *Just Giving*, and *Decolonizing Wealth*, along with recent critiques and legislation focused on donor-advised funds, have called out harmful power dynamics and posed serious and existential questions about the practices and structures of philanthropy.

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Many of these developments are not new, but are seeing new life and new energy because of their fit with today's shifting social change landscape. Others represent fundamentally different ways of trying to meet the challenges that lie ahead.

What's clear is that philanthropy today takes place in a context that is radically different from the environment in which many of the field's traditional models, systems, and structures were developed. Even before the pandemic, economic uncertainty, demographic shifts, blurring sectoral roles, and the ubiquity of powerful new

social media and mobile technologies were already fundamentally altering the landscape of social change.

This has led many to ask—at a moment that feels like it may be an important inflection point for the field—*what's next for philanthropy?*

WHAT WE'RE TALKING ABOUT WHEN WE TALK ABOUT PHILANTHROPY

It's hard to define or draw clean boundaries around the field of philanthropy today. The word literally means "love of humankind," but has come to encompass the wide range of ways people can share their time, talent, treasure, and ties to advance the common good.

It includes charitable, "giving with the heart," as well as more strategic, "giving with the head." It's institutional foundations and individual donors; small givers and large ones; private foundations, family foundations, donor-advised funds, giving circles, community foundations, and corporate foundations.

It's more than just the staffed foundations that are typically considered the center of "organized philanthropy," since many individual donors are just as thoughtful, intentional, and creative as the most established philanthropic institutions. And individual givers can now join together in new collectives and intermediaries, or use new technological platforms, to take actions that only large institutions could have attempted in the past.

At the same time, definitions of philanthropy are expanding as many of the traditional lines between the public, private, and independent sectors are beginning to blur with new hybrid organizations and cross-sectoral partnerships. Increasingly, social change is becoming "sector-agnostic," with people seeking impact on pressing societal problems without concern for where the solutions come from. Changemakers are experimenting with new ways to create social and environmental impact, from impact investing to political giving to socially responsible purchasing.

In this report, we intentionally use the words "philanthropy" and "funder" in a very broad way to mean givers of all types and sizes because we feel there is much to learn and share from across the diversity of the field. Too often, we have found that discussions about philanthropy tend to be siloed: Private foundations talk with other private foundations, individual donors with other donors, large foundations with other large foundations, community foundations with other community foundations. We're trying to bridge those divides.

Scaling Edges

THE INCREASINGLY VOCAL critiques of the field and the growing resolve of many funders to test new approaches in the face of recent crises belie the general trend that modern philanthropy as a whole has typically moved more slowly and unevenly. And despite all the experimentation in and around the field, most of the core practices and principles of giving remain largely unchanged for the vast majority of funders. Foundation presidents from a half-century ago would find themselves quite at home amid the board governance, organizational structures, endowment management, and primary grantmaking processes of today's funding institutions.

Despite all the experimentation in and around the field, most of the core practices and principles of giving remain largely unchanged for the vast majority of funders.

The pervasive stasis of the core of the field in the face of widespread change before the COVID-19 outbreak is easily recognizable to many who study organizational transformation. Deloitte's Center for the Edge, for example, argued that major private sector organizational change efforts fail more often than not, usually because they try to challenge the core of the organization head-on.² Deeply embedded structures, norms, relationships, and power politics serve as

antibodies to change, even as leaders say and do the "right" things. As a result, change efforts often end with a whimper when, after much reflection and consternation, the status quo largely remains.

This frame will no doubt feel familiar to anyone who's ever tried to create change in philanthropy, too—not just at the organizational level, but also at the field level. A quick skim of the 25,000 online search results that assert "philanthropy needs to" or "philanthropy must" take a particular action is telling. For every idea that really moves the field, there are a hundred (or maybe a thousand) that reverberate briefly in an echo chamber before fading.

To help address these challenges in a commercial context, our colleagues at Deloitte's Center for the Edge developed a methodology they call *Scaling Edges*, which we have found helpful in principle when thinking about field level change in the philanthropic space as well.

The *Scaling Edges* approach posits that the world is constantly changing, driven by a range of powerful social, economic, and political trends and forces. Alongside these shifts—and, in many cases, in response to them—people and organizations are continuously experimenting with new ideas and strategies at the edges of any field. Most of these new approaches remain small and marginal to the mainstream core of practice. But the "Edges" that are particularly well-aligned with the biggest of the shifts show an outsized potential to grow and to influence and reshape the core over time.

Big Shifts

WHILE FOUNDATIONS AND donors have significant freedom to ignore many large societal changes, certain big, fundamental shifts around the field have proved unavoidable and show up, often uninvited, into funders' work. This has happened throughout philanthropy's history—from the emergence of “scientific” and “professional” philanthropy during industrialization, to the “democratization” of philanthropy and the use of policy as a tool for social change in the 1960s and 1970s, to the rise of social entrepreneurs and “philanthrocapitalists” in the 1990s and 2000s. As Benjamin Soskis and Stanley N. Katz have written, philanthropic practices reflect the “particular historical moments in which the labels developed and the dominant modes of industry, commerce, and accumulation that they modeled.”³

Our research suggests that there are at least seven critical “Big Shifts” occurring now that have the potential to create fundamental change in the philanthropic landscape (listed here in no particular order):

ECONOMIC INEQUALITY, which is at once producing tremendous new challenges and need in communities while also creating massive fortunes that are bolstering philanthropy at an extreme scale. And the growing awareness of this divide (and its interconnection with racial disparities) is producing a highly visible public backlash against the severe concentration of wealth that is fueling much of today's philanthropy.

EXTREME POLITICAL POLARIZATION that is dividing the population along partisan lines and politicizing previously apolitical issues. These divisions are making it increasingly difficult for philanthropy to remain outside the political

sphere (something the field has largely done since the Tax Reform Act of 1969) and, at the same time, opening up new opportunities to influence government funding streams and bring people together across differences.

SHIFTING DEMOGRAPHICS that are literally changing the face of our communities, as well as the issues they need to address. Traditional philanthropy—white, male, and older (oftentimes even dead)—is giving way to a far more diverse group poised to take up the mantle of community change. And as baby boomers reach retirement and millennials move into the workforce in record numbers, generational shifts are auguring new attitudes and new approaches in philanthropy.

NEW MOMENTUM AROUND RACIAL JUSTICE, which, after decades of work by activists, is driving significant increases in public support for addressing systemic racism and bias. In light of police violence and the growing visibility of systemic inequities affecting communities of color, public awareness of long-standing injustices has risen dramatically. Racial justice has become a critical backdrop to almost every other issue and has pushed organizations across sectors, disciplines, and geographies—including philanthropy—to grapple with systemic racism in both their external actions and their internal practices and cultures.

UBIQUITOUS TECHNOLOGY AND ACCESS TO INFORMATION that allow people to easily communicate and connect with one another, to access diverse perspectives, to build and share data, and to coordinate and organize action in new ways. This is creating new possibilities for generating impact, but also new challenges that philanthropy will need to address in its work,

especially as ownership of data, the spread of misinformation, the filtering of information flows, and expectations around participation and voice reshape public discourse.

A STATE OF CLIMATE AND SOCIAL EMERGENCY

that, with the COVID-19 outbreak, is increasingly impossible to ignore at both the local and global levels. Health and environmental crises, as well as human-made ones, can exacerbate existing problems or swiftly and unpredictably trump the existing agenda of any community or funder. Think of how a hurricane or a flood might drastically change local priorities. And, as we are seeing with COVID-19, philanthropy can no longer escape being called upon to act and respond to what may become the “new normal” of increasingly frequent public crises.

A SOCIAL COMPACT IN FLUX, which is fundamentally reshaping both how people relate to the institutions of business, government, and the social sector, and how the different sectors relate to one another. More and more, businesses are engaging in social benefit activities, social enterprises are blurring the lines between nonprofit and for-profit, and philanthropy is increasingly being asked to fill in

where government has retrenched. And as public trust in traditional institutions declines and expectations shift about the roles that the different sectors play in people's lives, there is space for philanthropy to position itself very differently vis-à-vis the other sectors in the years ahead.

While none of these forces are new, and each of them is significantly changing the social sector on its own, they are also combining, accelerating, and reinforcing one another in complex ways that are fundamentally transforming our lives and our communities. Altogether, they are creating a whole new context for the work of philanthropy. Take, for example, how the challenges of the COVID-19 crisis were compounded as existing economic disparities, racial inequities, political polarization, distrust of public institutions, and the spread of misinformation through technology served as huge multipliers of the public health emergency.

To get a deeper understanding of how each of these shifts are impacting philanthropy, we recommend reading our more [detailed primers](#) about each of the Big Shifts, designed specifically for use with donors, boards, and staff.

Critical Edges for Philanthropy

FUNDERS ARE EXPERIMENTING with new ideas and new strategies to respond to these shifts.

These approaches aren't necessarily fully tested or robust enough to challenge the core practices of the field yet. But they show promise because they are particularly well-aligned to the shifts occurring in and around the field. And as a result, they have real potential to ride the momentum of the Big Shifts to grow in a way that will allow them to influence (or even overtake) the practices of the core over time.

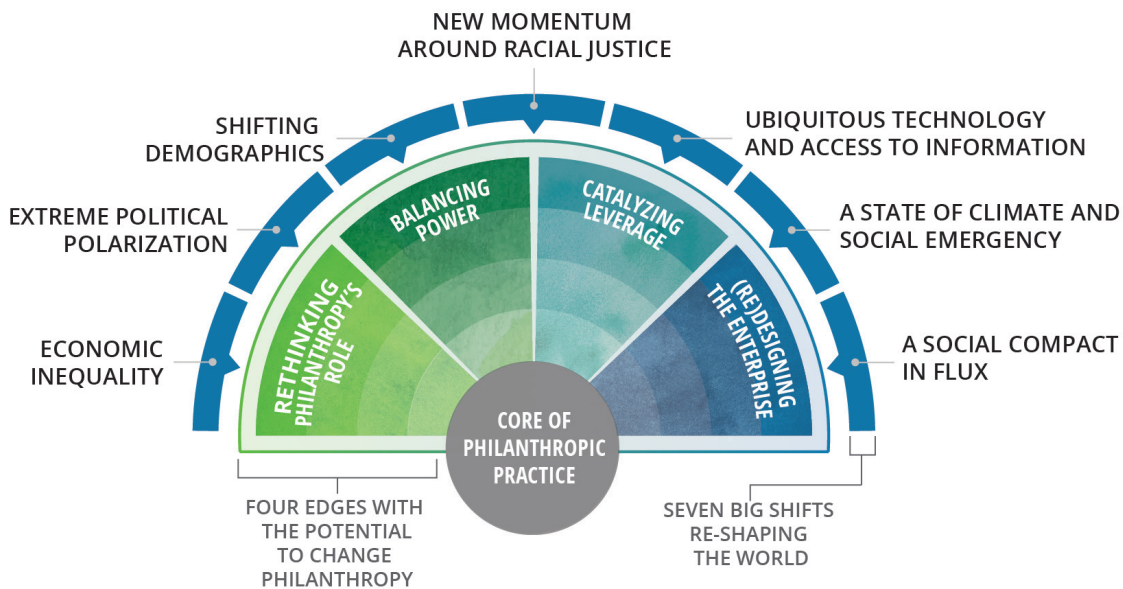
Our aim is to identify promising Edges that, if scaled, could begin to challenge or change some of the core practices of the field that are no longer a good fit for today's philanthropic context. These are spaces for innovation where the Big Shifts are forcing philanthropic leaders

to adjust their approaches and strategies. What these Edges will look like in the future isn't entirely clear yet, but there is an opportunity for funders, both individually and collectively, to investigate, experiment with, and invest in the potential of these promising areas of activity.

Through our conversations, we surfaced four key Edges and, within each of them, four key "Edge Practices" that we believe represent critical frontiers for philanthropies and individual donors in the coming years. There is not necessarily a right answer for which approaches will be the best fit for specific funders, given their unique roots, circumstances, and goals. But grappling with each of the different Edges with an understanding of what is possible will allow funders to chart their own paths across the shifting landscape of philanthropy's future.



SHIFTS AND EDGES CHANGING THE CORE OF PHILANTHROPIC PRACTICE



Following are brief explorations of each Edge in turn. For more information and deeper analysis of the pros, cons, and implications of these different Edge practices, we recommend reading our more detailed [Edge Overviews](#).

Edge 1: Rethinking Philanthropy's Role

Many funders are beginning to explicitly reconceptualize their role in creating social and environmental change, thinking carefully about what impact they want to see in the world and getting intentional about the different tools they can use to create it. The approaches can vary widely, but we identified four practices that funders are using to match their strategies to fit their social impact ambitions:

CHANGING SYSTEMS AND CULTURAL NARRATIVES

Some funders are scaling up their ambitions, shifting their unit of analysis beyond narrowly

defined interventions to try to fundamentally change systems and influence large-scale policies, movements, and culture. For example:

- Akonadi Foundation's "All In for Oakland" initiative supports the work of a local "ecosystem of movement organizations" by investing in people of color-led organizing, advocacy, and power-building focused on ending the criminalization of Black youth and youth of color.
- Organizations like The Center for Cultural Power and Pop Culture Collaborative work with artists, journalists, entertainment leaders, social justice movements, cultural organizations, and others to try to shift popular narratives and cultural norms as a way of creating enduring change in public attitudes and mindsets about Black, Indigenous, and people of color (BIPOC) communities.
- Omidyar Network's "Reimagining Capitalism" initiative seeks to address structural challenges embedded in capitalism to shape a

new, more inclusive economy where markets serve the interests of all people and society.

GETTING OUT OF THE WAY

As some funders expand their scope of activities, others are more narrowly defining their role, finding ways to support the missions of high-quality nonprofits with as little complication as possible. As one foundation CEO noted, “Sometimes funders need to find ways to remove themselves from the equation in order to get the result they want.” For example:

- MacKenzie Scott’s decision to donate nearly \$6 billion to approximately 500 organizations was notable for its scale, but also for what it doesn’t include: no grant proposal process, no ongoing reporting requirements, and no naming rights.⁴
- A growing movement in the field has been to provide nonprofits with multiyear, general operating support rather than individual project grants. This type of funding allows nonprofits to use the resources in the manner that they believe will have the most impact, as opposed to meeting the preferences or dictates of funders.

FUNDING INNOVATION TO MAXIMIZE IMPACT

For many of the intractable social and environmental problems we now face, the solutions are not yet known. Existing approaches are proving insufficient, and many funders are exploring how they can intentionally fund social innovation and find new strategies with the potential to create breakthrough change. For example:

- The Robert Wood Johnson Foundation’s Pioneer Portfolio uses a multipronged strategy that helps it scan for emerging new ideas, source innovations, make early-stage grants to explore new fields and accelerate promising new ideas, and support emerging opportunity spaces that have the potential to

produce important breakthroughs while also playing an important learning role in introducing new thinking, insights, and approaches to the work of the broader Foundation.

- Recognizing that nonprofit organizations often don’t have the capacity to test and implement new or early-stage ideas, the Barra Foundation’s Catalyst Fund provides risk capital, through grants and below-market-rate investments, for experiments and innovations that local nonprofit organizations believe could have an outsized impact on the Greater Philadelphia region and beyond.

INCREASING AGILITY TO RESPOND TO CRISES

In a rapidly changing world, some funders are finding that their grantmaking strategies need to be more nimble so that they can pivot when needed and adapt to respond to critical needs and opportunities. As one foundation executive explained, “Regardless of where you are, crises and disasters have become the new normal, and it’s getting harder and harder for funders to just continue with business as usual when they happen.” For example:

- In 2020, soon after the COVID-19 pandemic broke out in East Asia, the Hong Kong Jockey Club established a HK\$100M (~US\$13M) COVID-19 Emergency Relief fund that used a digital process to quickly accept applications and support more than 200 organizations, with grantees receiving funds in as few as 10 days. The Jockey Club also rapidly negotiated with regional mobile carriers to purchase data-carrying SIM cards for 100,000 students for remote learning, a pilot that the government scaled up at the start of the new school year.
- In the wake of Hurricane Katrina and the Deepwater Horizon oil spill, the Baton Rouge Area Foundation partnered with government and environmental leaders to create the Water Institute of the Gulf, which focuses on

research, data modeling, policy advocacy, and knowledge-sharing on topics related to water needs in the Gulf and around the world, including Vietnam and Argentina, as a way to ensure that the region can be better prepared for future water-related emergencies.

These different practices each represent a set of deeper assumptions about philanthropy's role in society. Should funders be using their unique assets and positioning to try to intervene in larger systems? To step back and simply finance the work of grantees who are closer to the issues and communities they are serving? To find and fund innovation where existing solutions are proving insufficient? To respond flexibly to the rapidly changing realities and needs of our communities?

There is no universal right answer to these questions, but as the world shifts in the years ahead, funders should expect to revisit the assumptions they make about their role in creating social change, and align their methods, actions, and structures accordingly.

Edge 2: Balancing Power

The power dynamics that underlie organized philanthropy—between grantors and grantees, donors and communities—have been an inherent part of philanthropy since its earliest days. But over the past decade, growing awareness of economic inequality and racial disparities has begun to make these often-unspoken undercurrents much more visible.

Although it can take markedly different forms, funders are grappling with how to navigate these difficult power imbalances. As Dimple Abichandani, Executive Director of the General Service Foundation, remarked, “We can’t pretend that power dynamics do not exist anymore, but we *can* choose how we respond to them.” Our research surfaced four practices funders are

exploring to address power dynamics in their work head-on:

SHARING POWER

Some funders are working to intentionally *share* power in ways that bring philanthropic decision-making more proximate to the communities they serve. A number of funders have focused on listening to the voices of grantees and communities and incorporating their viewpoints into their strategies and funding decisions. Others are more explicitly sharing decision-making authority and finding ways to come to consensus with grantees and communities on important strategic decisions. And others are actively ceding power to communities altogether. For example:

.....
“We can’t pretend that power dynamics do not exist anymore, but we can choose how we respond to them.”
.....

- The Trust-Based Philanthropy Project, a five-year, peer-to-peer funder initiative, is pressing foundations to interrogate their relationship to power. Funders using the approach, such as The Whitman Institute, consciously reimagine their roles away from “compliance stewards” to “collaborative learning partners.” They seek out mission-aligned organizations and provide long-term, patient resources (often in the form of multiyear unrestricted support), streamlining burdensome protocols, taking action on grantee and constituent feedback, and offering support beyond the check—trusting the nonprofits to make good choices and do their work without strategic interference.
- A group of Indigenous leaders and funders in Canada created the Indigenous People’s

Resilience Fund, a fund fully managed by and for Indigenous communities and organizations, operating on the Community Foundations of Canada shared platform. The funders have provided unencumbered dollars and are not part of the decision-making process, recognizing that the Fund's Indigenous leaders have a much better sense of communities' needs.

USING POWER

As funders look for ways to share and cede power, many are also exploring how to intentionally use their power and influence to drive the changes that they want to see in the world. Funders that use power are really using their unique assets (money, influence, connections, and more) to spark change. For example:

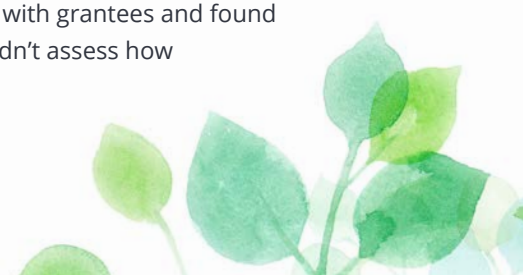
- The California Wellness Foundation made a strategic pivot to use its communications and public voice to amplify its grantmaking and bring increased attention to issues it sees as priorities. The Foundation created a public affairs department and stepped up its external communications and thought leadership to advance the organization's agenda, including joining an amicus brief on a key immigration case and providing public comments on the 2020 Census "citizenship question."⁵
- Arnold Ventures has deliberately emphasized research, analysis, and policy advocacy on some of the most pressing problems in the United States, including gerrymandering, gun violence, pension reform, and criminal justice. The organization relies on the use of data and evidence to improve policy outcomes. As Laura Arnold, one of the founders, shared in a recent interview, "There are some legitimate questions as to whether somebody with vast amounts of resources should be in a position to influence policy.

[But] the common thread is simple: we want to improve people's lives."

SETTING GOALS AND EVALUATING WITH EQUITY IN MIND

As Jara Dean Coffey, founder of the Equitable Evaluation Initiative, explains, "There is a really interesting blind spot around evaluation in philanthropy. People aren't even thinking about how power dynamics impacts how we assess impact. Or, if they are, they are mostly just caught up in virtue signaling." To address this blind spot, some funders are beginning to reconsider how they work with nonprofits and communities to set impact and learning goals and how they can measure and evaluate outcomes more equitably. They are actively working to bring grantees and community members to the table when making decisions about what success looks like, what gets measured, and who gets to decide those questions. For example:

- The McConnell Foundation decided to more actively understand and respect community perspectives on goal-setting and evaluation with close partner the Winnipeg Boldness Project, and found that the originally planned focus on outcomes for individual children was incongruous with the family- and community-centric approaches of Indigenous partners. The Foundation fully supported the Winnipeg Boldness Project's decision to employ a community-led approach, which meant adjusting and expanding original goals to center holistic approaches to well-being that address mental, physical, emotional, and spiritual aspects.
- Beyond simply using traditional metrics, such as the number of patients served, wait times, and health improvements experienced by patients, the Missouri Foundation for Health worked deliberately with grantees and found that these targets didn't assess how



respectfully patients were treated and whether providers recommended affordable, accessible treatments. “I don’t think it’s acceptable to have better health outcomes but have people say they feel bad about the care they’re getting,” explained Kristy Klein Davis, the Foundation’s Vice President for Strategy and Learning. “We shouldn’t get those better outcomes at the expense of people’s dignity or self-worth.”⁶

DIRECTLY ADDRESSING RACE AND POWER

Power dynamics are inextricably linked to race, and many funders are beginning to reexamine both their external strategies, such as who and how they fund, and their internal practices, including operations, staffing, and representation at leadership levels. For example:

- The W.K. Kellogg Foundation has made racial equity a cornerstone of its work, both inside the Foundation and externally in its programs. The Foundation made an explicit commitment to becoming an antiracist organization and invested in developing research, tools, and other resources to support this work, which it is now seen as an inextricable part of the Foundation’s “organizational DNA.” And the commitment to racial equity is reflected externally as a focus in all of the Kellogg’s grantmaking and programs, from its community-led Truth, Racial Healing, and Transformation efforts, to its Expanding Equity program, which supports racial equity training and work in private sector businesses.
- The Chicago Community Trust made the decision to center its strategy on closing the racial and ethnic wealth gap in Greater Chicago, recognizing it was the root of many of the city’s challenges. The Trust is funding efforts to grow household wealth, catalyze

investment in disinvested communities, amplify the voices of community residents, and support people of color in building political and economic power in the city.

- In the coming years, as awareness of inequities continues to grow and organizations of many types begin to challenge their systemic biases, questions about navigating power will need to be addressed more explicitly and more often. Power dynamics exist, even when they aren’t spoken about openly, and they show up in how funders invest, who they hire, what they do, how they make decisions, and how their efforts are judged and measured. Funders that deliberately recognize and reckon with these complex dynamics will be better positioned to navigate their way through them.

Edge 3: Catalyzing Leverage

Organized philanthropy’s assets are typically dwarfed by those of other players. Individual donors give more than four times as much as institutional funders,⁷ and the combined assets of both pale in comparison to that of the government and, even more so, the private sector.

So a growing number of funders have begun to recognize that they can have a greater impact by *catalyzing leverage*—mobilizing the assets of other stakeholders to better match the scale and scope of the problems they’re seeking to address. They’re moving from a traditional focus on “assets under management,” to instead think about what Tony Mestres, the former President and CEO of the Seattle Foundation, termed “assets under influence.” These funders are reorganizing their work to intentionally sway the outsized resources of other philanthropic funders, private sector companies, and government funding flows. This is happening in a variety of ways:

UNLOCKING AND GUIDING CAPITAL

Funders are testing ways to unlock dollars and influence donors both large and small to give more, give smarter, and give together. This includes increasing efforts to promote philanthropic giving, the proliferation of giving intermediaries and giving circles, and the growth of impact investing, political giving, socially responsible purchasing, and other ways of using capital to create social change. For example:

.....

Many funders are moving from a traditional focus on “assets under management,” to instead think about “assets under influence.”

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- The Giving Pledge, which calls upon many of the world’s wealthiest individuals to make a public commitment to increase their charitable contributions, has grown from 40 donors in 2010 and is expected to grow to include more than 200 people committing upward of \$600B to philanthropy by 2022.⁸ Meanwhile, Communities Foundation of Texas’s North Texas Giving Day, an online giving event aimed at enlarging the spirit of local giving, has grown from raising \$4 million from 6,500 donors in 2009 to almost \$80 million from more than 100,000 donors in 2020.⁹ Whether a donor is giving a few dollars per day or a few dollars per second, these types of efforts aim to unlock greater charitable contributions to a wide range of causes, building community capacity and strength.
- New giving intermediaries, such as Blue Meridian Partners, New Profit, and Co-Impact, provide value to donors and to the field by pulling resources off the sidelines, aggregating funds for greater impact, and

directing dollars toward areas in need of greater investment. Co-Impact, for example, aggregates capital from individual donors, institutional foundations, and corporate funders and directs their dollars toward carefully vetted international systems change efforts.

- The Global Impact Investing Network (GIIN) has been instrumental in promoting the growth of impact investing over the past decade—from a nascent market to a more than \$715B industry—as funders are looking to align their investments with their values and vision for impact. The growth of impact investment capital is elevating the importance of creating measurable social and environmental benefits alongside financial returns and has fueled new kinds of structures, from social impact bonds to B corporations, that are bringing new resources off the sidelines.

ALIGNING ACTION

While funder collaborations aren’t new, many practitioners noted that as funders work on complex, interconnected issues across geographies, there has been more effort to partner with others and make shared progress. There’s a sense that after years of growth, philanthropic collaborations may finally be hitting their stride. Philanthropic networks allow funders to identify and engage more of the stakeholders that are essential to addressing an issue, to build shared understanding of complex problems, to mobilize resources that match the scale of the challenges, to work together to test a range of possible solutions, and to create feedback loops and systems for sharing that can facilitate collective learning and action. For example:

- To gain the benefits of collective impact, the members of the Community Foundation Opportunity Network first came together in

2016 to share ideas and approaches related to narrowing the youth opportunity gap. In addition to compiling learning from across geographies, the Network facilitates “strategy action labs” where four to six foundations come together to make more concentrated progress on specific issues. More recently, the Network launched an aligned action network to dismantle structural and systemic racism and achieve social and economic mobility that seeks to leverage national foundation and donor funding.

- Founded in 2019 with support from Charles Koch, George Soros, and others from both sides of the political aisle, the Quincy Institute for Responsible Statecraft was formed as a deliberately “transpartisan” national security think tank. The Institute engages both conservative and progressive leaders to find areas of alignment and has produced a transition guide aimed at promoting American foreign policy centered on diplomacy and military restraint, rather than military intervention.

INFLUENCING AND PARTNERING WITH BUSINESS

As companies are articulating a greater sense of “purpose” and embedding it in their work, they are creating new openings for philanthropy to support or align efforts based on common interests. Because of the enormous size of businesses’ workforces, direct sales, supply chains, and procurement, seemingly small changes, like fast food giants shifting their supplier requirements or grocers promoting organic produce, can have massive, cascading impacts on social and environmental goals. While many philanthropic funders have real questions about how much of the social purpose talk from businesses will turn into action, a number of interesting approaches for working together with companies to create social impact are beginning to emerge:

- In addition to funding career training programs that increase the “supply” of trained workers, The James Irvine Foundation is engaging directly with companies to increase the “demand” for workers as well. Irvine worked with the Entertainment Industry Foundation to develop a career pathway program that matches jobseekers in Los Angeles from underrepresented backgrounds with entry-level employment opportunities in film and television production and provides ongoing support as they advance in the industry.
- The David and Lucile Packard and Walton Family foundations have invested heavily in developing standards, ratings, and certifications programs in the global seafood industry. Recognizing growing consumer interest in sustainable and just business practices, the programs have pushed businesses to adopt practices that promote ocean conservation, disincentivize the capture of endangered fish, and help buyers identify compliant fisheries and merchants. Owing in part to these efforts, standards programs focused on sustainability now cover 47% of the world’s seafood production.¹⁰

REDIRECTING GOVERNMENT FUNDING FLOWS

Funders are trying to achieve social goals by tapping into and influencing the allocation of local, state, and federal government dollars. Although the Tax Reform Act of 1969 limited political activities by foundations and changed the relationship between funders and the government for decades, in recent years, funders have begun to lean back into advocacy—with a clear understanding of both the legal limitations and the possibilities—because of the sheer potential for influencing the allocation of local, state, and federal government dollars.

- In Los Angeles, a consortium of 30 philanthropic funders—including the Conrad N. Hilton Foundation, California Community

Foundation, United Way of Greater Los Angeles, The California Endowment, Weingart Foundation, and many others, collaborated in an effort to influence government policies around homelessness and supportive housing. The funders supported nonprofits focused on homelessness, engaged housing developers, and built political support by raising public awareness through media campaigns and education about permanent solutions to homelessness. This long-term investment by funders in organizations focused on permanent housing led to instrumental change in Los Angeles. Nonprofit organizations passed Proposition HHH in 2016 and Measure H in 2017, which called for building upward of 10,000 permanent supportive housing and raising \$3.5B in public sector revenue over 10 years, respectively—in addition to other policy wins.¹¹

- The Raikes Foundation partnered with the State of Washington to stand up its Office for Homeless Youth. The Foundation worked closely with youth activists to shape the State's efforts with homeless youth and funded research to understand the scale and scope of youth homelessness in the region, evaluations, and even short-term staffing for the newly created Office. With its initial effort and investment, the Foundation helped to create durable government capacity that is now a fixed part of the State's budget and priorities.

Many of these practices may not seem like uncharted territory, as funders have long been pondering ways to collaborate together or with other sectors. However, today's increasingly complex and interconnected challenges, whether at the local, national, or international level, call for a range of viewpoints, a diverse set of skills and resources, and coordinated efforts. No one organization has the assets or reach to solve them alone. And we are beginning to see new angles and new energy emerging around many of these old approaches as funders look

for ways to increase their impact and amplify their own efforts.

Edge 4: (Re)Designing the Enterprise

The structure and configuration of philanthropic enterprises have long been guided by a number of “default settings” that continue to hold powerful sway over much of the field. That's not to say that there hasn't been some degree of experimentation in the field, but even as the world has shifted dramatically around philanthropy, the normal assumptions about how philanthropy should be governed, structured, and managed have remained largely unchanged over the decades.

Yet many of these traditional structures and approaches may no longer be an optimal fit for addressing today's complex challenges. Our research identified at least four key ways that funders have been actively trying to redesign the philanthropic enterprise:

RETHINKING ORGANIZATIONAL FORMS

The foundation form still provides a strong base for accomplishing many important charitable activities. However, donors are increasingly experimenting with alternative structures, such as donor-advised funds (DAFs), giving circles, 501(c)(4) organizations, and limited liability companies (LLCs), that have the potential to be more efficient or effective vehicles for funders seeking to influence policy and make for-profit investments.

- Charles and Lynn Schusterman Family Philanthropies, for example, includes both the charitable 501(c)(3) grantmaking funded through the Charles and Lynn Schusterman Family Foundation, as well as advocacy activities supported by the Schusterman

family. This gives the Schusterman family additional flexibility to use a wide range of advocacy investments, including supporting policies and legislation, to advance their values and work. While traditional foundations are able to do limited policy advocacy, this approach allows funders to connect its advocacy work more directly to its social impact goals.

The structure and configuration of philanthropic enterprises have long been guided by a number of “default settings” that continue to hold powerful sway over much of the field.

- Emerson Collective structured itself as an LLC in 2004 to be able to leverage a number of tools—from for-profit investments to policy advocacy—in addressing issue areas such as education, immigration, cancer research, media & journalism, and the environment. In media, for example, it has launched for-profit production companies like Concordia Studio to promote impactful storytelling and narratives. Guided by the belief that journalism is means to strengthen democracy, Emerson Collective supports nonprofit journalism entities such as ProPublica and The Marshall Project. The Collective’s structure allows it to apply a range of different tools beyond just grantmaking to create social change.

RECONFIGURING ORGANIZATIONAL DESIGN AND TALENT MODELS

The rapidly changing landscape of public problem-solving is beginning to challenge many common assumptions about how funders organize and staff their philanthropic efforts. Funders are rethinking traditional practices, such as breaking work into issue-focused silos and hiring subject-matter specialists, and

exploring new models that better fit their strategies and aspirations. For example:

- The W.K. Kellogg Foundation has adopted Agile practices, a methodology from software development that relies on constant collaboration between cross-functional teams. The approach integrated internal silos and flattened hierarchies to move toward more self-sufficient programmatic teams. These teams were staffed with experts across a variety of functions who previously sat in separate units (e.g., communications, evaluation, grants eligibility). As a result, programmatic teams work collaboratively to answer their own questions rather than engaging in continuous back-and-forth with siloed functions.
- A growing number of donors are hiring intermediaries and consultants to outsource the staffing of their philanthropy. They’re turning to community foundations and organizations like Tides and Arabella Advisors for help with identifying and selecting potential grantees and a range of other grantmaking and advisory services, bypassing the need to hire permanent staff or to establish a foundation altogether.

RECONCEIVING GOVERNANCE

Philanthropic foundations inherited their board governance structures from the corporate sector in the 1800s, but the models aren’t necessarily well-designed to serve the unique needs of the social sector. As Rebecca Aird, Director of Community Engagement at the Ottawa Community Foundation, summarizes, “Boards are nineteenth-century solutions to twenty-first-century problems.” As a result, some funders are reconsidering the makeup and role of their boards to try to better position trustees to add value and provide effective governance in the philanthropic context. For example:

- The Headwaters Foundation in Montana actively engaged board members and helped

them reconceive their duties and relationship with staff. As Brenda Solorzano, the Foundation's CEO, remarked, "I told the board that they would hold us accountable and be in partnership with us. They needed to stay at a governance level, think about our high-level strategic vision, and allow staff to create work plans beneath the strategic vision." The Foundation's board moved away from approving grants to setting and steering the overall strategy, spending and investment policies, and a yearly work plan that consisted of a strategic framework for each initiative, as well as aligning on high-level outcomes.

- Dimple Abichandani, Executive Director of the General Service Foundation, worked with her board to reexamine the Foundation's spending policies.¹² As she explained, "Spending policies are the invisible architecture in philanthropy. People get caught up in dividing up budget, but the real money is in the spending policy. And just like the budget, it's a reflection of one's values." So, she and her board very deliberately began a process of grappling with questions about how to balance their commitment to perpetuity with responding to the urgent needs of the moment. The board ultimately voted to increase the Foundation's annual spend to 10% for the upcoming four years.

IMPROVING GRANTMAKING PROCESSES

Innovating internal grantmaking processes is sometimes relegated to an afterthought in strategy processes, but improved systems can significantly drive program effectiveness, increase impact, and strongly signal a funder's values to external partners. As a result, some funders are looking at the policies and processes they use in their work to make sure their practices are clearly aligned with their values. For example:

- JustFund, a giving platform designed to reduce friction in grantmaking, created a common proposal for grantees, similar to the popular "Common App" for undergraduate university admissions. Grantees fill out the proposal once and use it to apply to funding opportunities while making their work visible to all funders.
- After the Autodesk Foundation makes a grant, due diligence records are available upon request to other funders and grantees, including notes on potential risks and impact opportunities. As Joe Speicher, Executive Director of the Autodesk Foundation, explains, "Those of us in philanthropy need to be clear about what we are funding, why we are funding it, and what the criteria is; it's the first step to reducing bias - and ultimately leads to better impact outcomes."



What's Next?

AFTER THE EVENTS of the past two years, it's become clear, if it wasn't already, that it's a mistake to try to make too many predictions about the future of philanthropy. The world can change quickly and dramatically, and even if philanthropy generally moves more slowly, funders will need to be prepared to change along with it. Yet while we don't know *exactly* how philanthropy will change over the next decade, we do know the general directions we should be looking in to spot the emerging seeds of what's next.

The Edges highlighted in this report represent our best suppositions about where funders are likely to be pushing the frontiers of philanthropy in the coming years. Our separate, more detailed, [Edge Overviews](#) illustrate many of the ways funders are *already* experimenting with new practices. But it's interesting to try to imagine some of the even more provocative directions that funders might head in response to the Big Shifts over the next decade.

For example, we're watching the way funders are beginning to **rethink the role they play**, thinking more critically about the impact they want create and more fully committing and aligning their actions to achieve it.

What if...

- **...philanthropies started to make the scale of the problems they take on even bigger?** Recognizing that the types of outcomes they have historically sought are inextricably part of much larger systems, look for more funders to scale up their efforts to influence larger systems and cultural narratives like capitalism, democracy, global governance, and systemic racism.
- **... funders went all in on people, relationships, and network-building in place?** As some funders begin to act as much like community organizers as they do like grantmakers, look for more philanthropies to invest significantly in building the relationships, trust, capacity, and infrastructure that enables local civic problem-solving.
- **...more funders simply started trying to get out of the way of their grantees?** Recent gifts have shown that big philanthropy doesn't necessarily have to mean big infrastructure and complex processes. Look for more funders to fully commit to supporting the strategies of nonprofits instead of developing their own.
- **...more foundations and donors began to optimize for agility and innovation rather than structure and proven outcomes?** Look for more funders to set aside a portion of their funding each year for experimenting with high-risk, high-reward efforts and responding flexibly to emerging crises and opportunities.

We're looking at the way foundations and donors negotiate how they **balance power with grantees and communities**. For many funders, openly grappling with the inherent power dynamics of the field are changing the ways they design, fund, and evaluate their strategies.

What if...

- **...funders began to set up “accountability councils” instead of “advisory councils?”** As the field reckons with how it can share power more with communities, look for more funders to explicitly name the communities to whom they are holding themselves accountable and to creating mechanisms for answering to them.
- **...sharing power also meant sharing your endowment?** As funders wrestle with centuries of power and economic imbalances, some are exploring how the accumulated wealth in their endowments could be used as a tool for rebalancing historic inequities. Look for some funders to use their endowments to share power, potentially even turning over a portion of their corpus to endow the work of BIPOC leaders and other traditionally marginalized groups.
- **...foundations and donors put dollars directly in the hands of local constituents?** Look for some funders to begin experimenting with using direct cash transfers to individuals as a way of putting dollars and decisions directly under the control of families and community members themselves.
- **...funders fully embraced the idea of using their power?** As funders get clear on the changes they want to see in the world, some are using fewer “half-measures” to achieve those changes. Look for more funders to aggressively leverage their voice, reputation, and political clout to unabashedly drive toward the impact they're striving to create.

We're looking at how funders are **catalyzing leverage** by using their assets to mobilize the resources of others toward important issues. Many funders are already playing a more active and direct role in designing, pitching, and brokering solutions with others.

What if...

- **...program officers were required to be fundraisers for their issues and organizations, not just grantmakers?** With more wealthy people entering philanthropy, there is an opportunity to unlock and guide capital to important issues. Look for more institutional funders to try to leverage their own strategies, due diligence, and expertise on social issues to guide the contributions of other donors.
- **...foundations became the go-to partners for helping businesses fulfill their DEI and ESG goals?** As the social compact shifts and sectors blur, funders continue to work across the public and private sectors. Look for funders to add capabilities to partner with businesses to cocreate corporate social impact solutions from the ground up.
- **...foundations and local governments formally partnered to test and scale solutions?** Philanthropy has long been seen as the “R&D wing” of the government, experimenting with new

ideas that the government could subsequently take over. But there are only a limited number of examples where that handoff has occurred. Look for funders to begin working more closely with government to experiment with new ideas that the government can scale and sustain if they prove successful.

- **...wealthy individuals began to see their businesses, investments, and philanthropy as part of a single, coordinated, mutually reinforcing portfolio?** A growing number of funders are blending for-profit and nonprofit investments, but look for donors to begin to go further, seamlessly integrating strategic corporate social impact efforts in their businesses with their individual philanthropy.

We're looking at how funders are **(re)designing the philanthropic enterprise** so that form follows function. Funders are exploring how they can make sure their structures, organizational design, staffing, governance, and processes stay aligned with values, goals, and actions.

What if...

- **...more donors began to rethink the need for creating a staffed foundation to do their philanthropy?** With the continued growth of philanthropic consulting, grantmaking intermediaries, and smart contracts, along with the rise of new, alternative vehicles for creating social impact, look for donors to explore what it means to do their philanthropy without the overhead of a staffed foundation.
- **...boards stopped approving individual grants?** It takes a tremendous amount of internal capacity to prepare grant dockets that require board members to get "in the weeds" to understand and approve each one. Look for more funders to develop higher-order, more strategic roles for their board that make better use of everyone's unique time and talents.
- **...funders complemented every grant they make with related investments in advocacy through in 501(c)(4)s?** As political polarization increases, more funders are adding policy advocacy to their repertoire and even launching new structures, like 501(c)(4)s, that allow for greater degrees of political activity. Look for more funders to take advantage of these kinds of tools and, even if they can't, to partner with those that can. At the same time, look for a growing concern about what that means for the increased politicization of philanthropy.
- **...funders moved from silos to networks?** Many funders cite Audrey Lorde's insight that "people don't lead single-issue lives" but stop short of thinking through the implications for their own siloed program structures. Look for more funders to come up with newer, more networked ways of structuring their organizations.

From the Edge to the Core

WHEN THERE IS a high degree of alignment between donors, boards, and staff, new ideas—even quite radical ones—can move from the edge to the core of an organization quite quickly. But for most funders, the situation is more complicated. They need to navigate across the different mindsets, expectations, and risk tolerances of donors, trustees, staff, grantees, and constituents. Balancing all these interests and viewpoints can produce a complicated status quo that can hold a funder in equilibrium for years or even decades. We've seen several recent examples of funders where staff has gotten out ahead of a board, only to be pulled back when trustees began to receive criticism from local policymakers and peers. Challenging the core directly raises organizational antibodies that dampen adaptation and protect current structures, programs, and grantmaking portfolios.

Yet the events of the past two years suggest that funders that *aren't* able to change and evolve to match the shifting realities of public problem-solving may, at best, be leaving potential impact on the table, and at worst, be at risk of losing relevance and influence as other, more adaptive funders grow in prominence and impact.

Our work here aims to provide a high-level approach for thinking about the type of experimentation that can make it easier for funders to change and adapt in response to a rapidly shifting future. We've created a rough game plan for how to get started on exploring and nurturing new Edges in your work, along with a simple toolkit of guides, inspirations, and even a game to help you engage. But at the heart of scaling Edges are really two key activities: *Finding Your Edges* and *Embracing Your Edges*.

Our work here aims to provide a high-level approach for thinking about the type of experimentation that can make it easier for funders to change and adapt in response to a rapidly shifting future.

Find Your Edges

Edges are ideas and approaches that start at the periphery of an organization or a field. They may have modest beginnings, but because they are aligned to major shifts in society, they have the potential to grow, influence, and ultimately reshape the core over time. Organizations that are able to identify these Edges early are better positioned to take advantage of major shifts in the world and to have a greater impact on the people and communities they serve.

Because Edges start small, they aren't always obvious to find right away. But there are avenues to explore that can help you surface and identify these approaches.

LOOK INWARD TO CHALLENGE YOUR ORTHODOXIES

Orthodoxies are deeply held beliefs about “how things are done” that may or may not still be true, but that often go unstated and unchallenged and can become blind spots over time. Orthodoxies help create standard practices that allow individuals and institutions to function more efficiently. But they can also lead to a dogmatic resistance to change that can prevent individuals and organizations from developing better ways of working.

Creating time and space—even if it's just an hour at a staff or board meeting—to think explicitly about the orthodoxies within your own operations, can serve as an important reminder that, just because things have been done in a certain way in the past, that doesn't *necessarily* mean it's the best way to continue to do them in the future. For most funders, the goal isn't to find a specific orthodoxy that will upend the entire organization. Instead, finding orthodoxies can help uncover mindsets and practices that may no longer be a good fit for the changing world. And flipping them, either partially or completely, can help you uncover new Edges in

your organization where you can begin to test new approaches.

The customizable *What's Next* **Orthodoxy Card Game** serves as a fun and stimulating way of helping funders of various types challenge and potentially flip calcitrant ways of working.

LOOK OUTWARD TO UNDERSTAND YOUR CONTEXT

It's hard for funders to get on their front foot if they don't have a very good sense of what's coming. In a dynamic world, funders can create more impact by better anticipating emerging trends and getting ahead of what those changes might mean for their communities and the ways they work. By understanding these Big Shifts, funders can also help parse which new ideas have real staying power and which might be a flash in the pan.

There are a lot of “shiny objects” in philanthropy, and a fair critique of the field is that funders spend too much time chasing them. Building a clearer understanding of the Big Shifts can allow funders to better differentiate the meaningful Edges that can ride the momentum of the Shifts and ultimately have the power to transform the core of their work from other interesting ideas that come through the door.

The *What's Next* **Big Shift Primers** help boards, staff, and donors understand changing the social impact landscape, providing examples of how other funders are responding to these large, inescapable trends and forces.

LOOK AROUND TO FIND IDEAS AND INSPIRATION

Rethinking approaches to solving social and environmental challenges doesn't necessarily mean inventing something entirely new. Many of the seeds of successful interventions of the future already exist in practice today. As science fiction author William Gibson famously

explained, “The future is already here; it’s just not evenly distributed.” So it often helps to start by looking around at what is already working. The easiest way for funders to start rethinking their work is by simply “copying shamelessly” from what is already going on around them.

The four *What’s Next* **Edge Overviews** tell the story of how funders are incorporating new Edge practices in their work, with more than **100** examples that can provide inspiration and ideas for funders of all sorts.

Embrace Your Edges

Once you find a promising Edge, it isn’t always clear what to do. After all, funders see hundreds of good ideas, and they can’t pursue them all. And because Edges start small and on the periphery, they may present themselves as off-strategy distractions from a funder’s core work.

Despite these complications, the real risk of *not* embracing Edges is that funders can be caught flat-footed in times of great change. Recent events have helped demonstrate that when it comes to the types of Big Shifts now occurring in the world, it isn’t a question of “if,” but rather “when” they will directly affect your work. While most philanthropies responded to the crises of the past two years in one way or another, we found that some funders we spoke with were particularly well-positioned because they had already begun intuitively embracing critical Edge practices in their work. The point here isn’t to laud these funders for their prescience—in fact, we won’t even name them—but rather to demonstrate how small moves, smartly made, can have outsized effects when they are well-aligned with the big shifts occurring in a rapidly changing world.

While no one could have predicted the COVID-19 crisis, one funder we spoke with did actively

anticipate that the likelihood and severity of social and environmental emergencies would continue to increase in the years ahead. So three years ago, it worked with its board to set aside more “dry powder” at the beginning of each year to respond to unforeseen events. Because the funder saw this external shift in the number and frequency of social and environmental emergencies and was able to devote a part of its budget to respond to them, the foundation was able to move quickly to respond to the health, social, and economic crises brought by the pandemic while also maintaining its other core programs, as well as its endowment.

Another funder was looking critically at harmful power dynamics between funders and grantees in the years leading up to the pandemic and eventually became an early adopter of trust-based philanthropy. When the pandemic hit, the foundation was able to ensure that its grantees continued to have the long-term general operating support needed to weather the storm. And as others in the field rushed to offer better and less onerous terms to grantees, this funder was able to offer lessons and insight to others on how to make large and lasting commitments to grantees without the normal hoops to jump through.

And several funders shared that recognizing racial injustice and inequity—and understanding them as root causes underlying a range of economic, health, and educational outcomes—helped them better respond to their communities in the midst of 2020. As one vice president of programs explained while discussing her foundation’s efforts around race, equity, and justice, “When funders began to realize that we needed to start dealing with racial justice in our work because of what was going on across the country, our team wasn’t on our heels. We were already doing it. And that wasn’t necessarily because our captain was

intentionally guiding the ship there; it was where the currents were already taking us.”

By embracing these currents of change and seeking out the Edges that align with them, funders can be better prepared for whatever comes next. To support these types of Edges in your work, we offer a few tips.

First, dedicate some time to learning and tracking what Edges are appearing in your work and where they are coming from. When most time and attention is focused on a funder's core work, it's surprisingly easy to miss emerging ideas. We've found that simply trying to intentionally capture and connect emerging approaches to your core work can help leaders understand the breadth of opportunities.

Second, give these ideas the space to be different without force-fitting them into the core of your work. Edges will likely pull you into new networks and new ways of working. Learn from them, as they point to what the future might hold. In an increasingly complex world, a natural reaction is to try and simplify, to focus in on the core of your work and eliminate seemingly unhelpful distractions. But we find that isn't the right approach in many cases. Instead, maintain the centrality and importance of your core work while also giving space to emerging ideas.

And third, watch the external landscape for signs that key Edges are building momentum. Take racial equity as an example. A decade ago, many funders took a “race-neutral” approach to their work. But increasingly, funders are applying a racial equity lens to their existing grantmaking, and a handful now view racial equity as the core of their work. When an Edge moves to the core, it can unlock powerful new perspectives and avenues for impact. It doesn't need to happen quickly or in one fell swoop, but understand that Edges will naturally pull on the core of your work, and may even transform it.

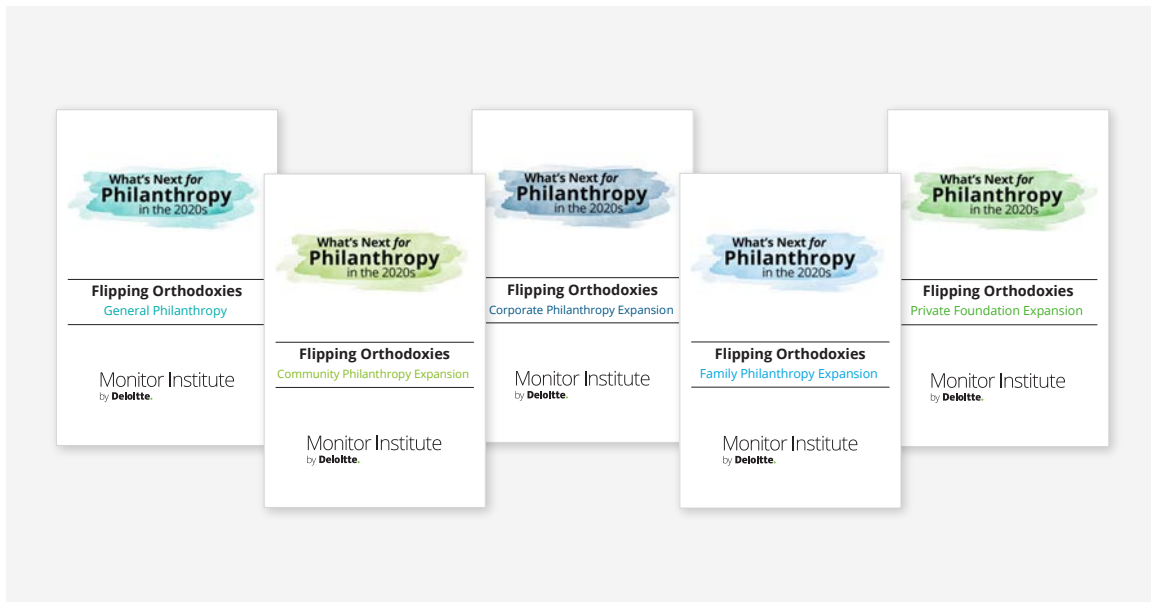
Change originating directly from the core is possible. Legislation, legal rulings, and sustained public critique all have the potential to challenge core philanthropic practices in major ways and demand new kinds of responses. But, in our experience, change in philanthropy, when it happens, more often starts from the edge. New ideas enter the field or organizations, percolate for a while off to the side, and eventually lead to bigger, more sustained changes if they can ride the momentum of larger societal shifts. And organizations that can find and embrace those Edges can get on their front foot in responding to a changing world.

Additional Tools for Exploring What's Next for *Your* Philanthropy

If you want to start finding and embracing the Edges in your philanthropy, we've designed a number of helpful do-it-yourself tools, discussion starters, and other supplemental materials for donors and philanthropic boards and staff.

- The customizable **What's Next Orthodoxy Card Game** helps you and those you work with to surface unproductive assumptions in how you do your work. Over the last decade, we've used this exercise with the boards and staff of hundreds of funders to help them identify existing blind spots, challenge established practices, and explore new ways of working that flip old assumptions.

To download everything you need to start challenging your orthodoxies, [click here](#).



- **The Big Shift Primers** are a set of short, accessible modules that look more closely at the large scale economic, social, and environmental trends that are shifting the landscape of philanthropy. They are intended to help boards, staff, and donors begin a series of dialogues about the way their issues and communities are changing, and what that might mean for how funders do their work.

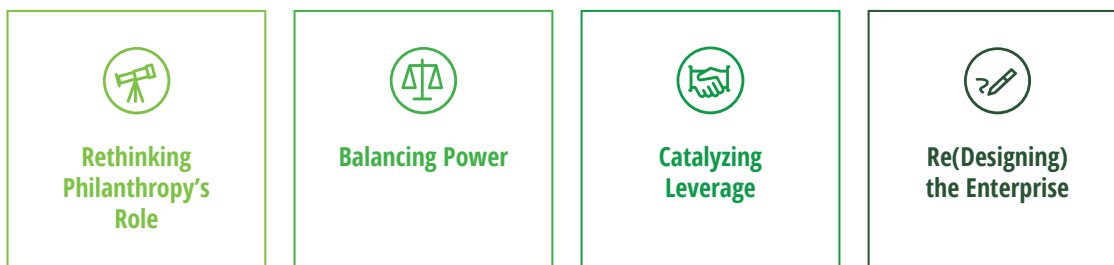
To download the Big Shift Primers, [click here or on one of the seven Big Shift Primers:](#)



- The **Edge Overviews** provide additional detail about the four Edges with the potential to change philanthropic practice. The report looks at different examples of how funders are experimenting with new practices and provide a deeper understanding of the implications and tradeoffs involved.

To download the Edge Overviews, [click here or on one of the four Edge Overviews:](#)

All materials are available at www.futureofphilanthropy.org.



Endnotes

1. Rebecca Solnit, "The impossible has already happened: what coronavirus can teach us about hope," *The Guardian*, April 2020.
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Interviewees

We do not have the names of everyone who helped to co-create the ideas of this initiative. But the people noted below represent what we believe is a nearly complete list of those who provided us with critical feedback and input through interviews, review of draft materials, and participation in pilot workshops. We apologize in advance for anyone we have missed. Titles and roles are reflective of organizational affiliation at the time of interview.

Dimple Abichandani, Executive Director
(General Service Foundation)

Shahira Ahmed Bazari, Managing
Director (Yayasan Hasanah)

Rebecca Aird, Director of Community
Engagement (Ottawa Community Foundation)

Natasha Alani, Chief Operating
Officer (McConnell Foundation)

Ivy Allen, President (Foundation
for the Mid South)

Ana Marie Argilagos, President
(Hispanics in Philanthropy)

Carrie Avery, President (Durfee Foundation)

Sharon Avery, President and Chief Executive
Officer (Toronto Community Foundation)

Leena Barakat, Director, Strategic
Partnerships (Tides)

Eric Barela, Director, Measurement
and Evaluation (Salesforce.org)

Lucy Bernholz, Director, Digital Civil
Society Lab (Stanford PACS)

Dave Biemesderfer, President and Chief
Executive Officer (United Philanthropy Forum)

Ian Bird, Ex-President (Community
Foundations of Canada)

Andrew Blau, Managing Director (Deloitte LLP)

Jason Born, Vice President for Programs
(National Center for Family Philanthropy)

Amit Bouri, Co-Founder and Chief Executive
Officer (Global Impact Investing Network)

Wanda Brascoupé Peters, (Indigenous
Peoples Resilience Fund)

Tim Brodhead, Ex-President and Chief
Executive Officer (McConnell Foundation)

Jeansil Bruyère, Director, Policy
and Communications (Philanthropic
Foundations Canada)

Phil Buchanan, President (Center
for Effective Philanthropy)

Chris Cardona, Program Officer (Ford Foundation)

Kara Inae Carlisle, Vice President of
Programs and Policy (McKnight Foundation)

Cathy Cha, President and CEO (Evelyn
and Walter Haas, Jr. Fund)

Rini Chakraborty, Senior Program Officer
(NEO Philanthropy's Four Freedoms Fund)

Stephen Chan, Vice President of Strategy
and Operations (The Boston Foundation)

Leong Cheung, Executive Director of Charities
and Community (Hong Kong Jockey Club)

Jennifer Ching, Executive
Director (North Star Fund)

Julia Chu, Senior Philanthropy Advisor (JP Morgan)

Andrew Chunilall, Chief Executive Officer
(Community Foundations Canada)

Zita Cobb, Founder and Chief Executive
Officer (Shorefast Foundation)

Willa Conway, Founder (Weavers Fellowship)

Terry Cooke, President and Chief Executive
Officer (Hamilton Community Foundation)

Sarah Cotton Nelson, Chief Philanthropy
Officer (Communities Foundations of Texas)

Flozell Daniels, President and Chief Executive
Officer (Foundation for Louisiana)

Jara Dean-Coffey, Founder and Director
(Equitable Evaluation Initiative and Luminare Group)

Chris Decardy, Vice President and Director of
Programs (David and Lucile Packard Foundation)

Arelis Diaz, Director, Office of the
President (W.K. Kellogg Foundation)

Tim Draimin, Senior Advisor
(McConnell Foundation)

Andrew Duncelman, Head of
Impact and Insights (Google.org)

Annie Dwyer, Director, Civil Society Fellows Program (Manhattan Institute)

Lenore Ealy, Senior Fellow, Communities (Stand Together Foundation)

Farhad Ebrahimi, Founder and Chair (Chorus Foundation)

Elizabeth Ellison, Chief Executive Officer (Lobeck Taylor Family Foundation)

Jayne Engle, Director, Cities and Places Portfolio (McConnell Foundation)

Kathleen Enright, President and Chief Executive Officer (Council on Foundations)

John Esterle, Co-Executive Director and Trustee (Whitman Institute)

Bridgit Antoinette Evans, Executive Director (Pop Culture Collaborative)

Evan Feinberg, Executive Director (Stand Together Foundation)

Tyrone Freeman, Assistant Professor (Indiana University)

Ellen Friedman, Executive Director (Compton Foundation)

Stephanie Fuerstner Gillis, Director, Impact-Driven Philanthropy Initiative (Raikes Foundation)

Katherine Fulton, Independent Consultant

Tony Fundaro, Chief Executive Officer (Philanthropy Southwest)

Glen Galaich, Chief Executive Officer (Stupski Foundation)

Martin Garber-Conrad, Chief Executive Officer (Edmonton Community Foundation)

Meg Garlinghouse, Vice President, Social Impact (LinkedIn)

Sarah Gelfand, Vice President, Social Impact Programs (Fidelity Charitable)

Rodney Ghali, Assistant Secretary to the Cabinet (Privy Council Office, Canada)

William Ginsberg, President and Chief Executive Officer (The Community Foundation for Greater New Haven)

Jeff Glebocki, Founder and Lead Advisor (Strategy + Action/Philanthropy)

Victoria Grant (Indigenous Peoples Resilience Fund)

Neel Hajra, Chief Executive Officer (Ann Arbor Area Community Foundation)

Donna Hall, President and Chief Executive Officer (Women Donors Network)

Carly Hare, Coalition Catalyst and National Director (Change Philanthropy)

Jacob Harold, Executive Vice President (Candid)

Keecha Harris, President and Chief Executive Officer (Keecha Harris and Associates)

Elizabeth Hausler, Founder and Chief Executive Officer (BUILD Change)

Crystal Hayling, Executive Director (The Libra Foundation)

Stephen Heintz, President and Chief Executive Officer (Rockefeller Brothers Fund)

Taryn Higashi, Executive Director (Unbound Philanthropy)

Anders Holm, Executive Director (Hempel Foundation)

Sandy Houston, President and Chief Executive Officer (Metcalf Foundation)

Stephen Huddart, President and Chief Executive Officer (McConnell Foundation)

Robert Hughes, Chief Executive Officer (Missouri Foundation for Health)

Leah Hunt-Hendrix, Co-Founder and Vice President (Way to Win)

Howard Husock, Senior Executive Fellow (The Philanthropy Roundtable)

Pia Infante, Co-Executive Director (Whitman Institute)

Christal Jackson, Founder (Head and Heart Philanthropy)

Marian Kaanon, Chief Executive Officer (Stanislaus Community Foundation)

Beth Kanter, Independent Consultant

Eamonn Kelly, Chief Futurist (Deloitte LLP)

Barbara Kibbe, Director (S.D. Bechtel, Jr. Foundation)

Roger Kim, Executive Director (The Climate + Clean Energy Equity Fund)

Mike Kubzanksky, Chief Executive Officer (Omidyar Network)

Mari Kuraishi, President (duPont Fund)

Peter Laugharn, President and Chief Executive Officer (Hilton Foundation)

Bruce Lawson, President (The Counselling Foundation of Canada)

Hali Lee, Co-Director (Donors of Color Network)

Mijo Lee, Executive Director (Social Justice Fund NW)

Janine Lee, President and Chief Executive Officer (Southeastern Council on Foundations)

Olivia Leland, Founder and Chief Executive Officer (Co-Impact)

Solome Lemma, Executive Director (Thousand Currents)

Leslie Lenkowsky, Professor of Practice (Indiana University)

Kevin Leonard, Executive Director (Echo Foundation)

Ken Leong, Head of Strategy and Partnerships (Yayasan Hasanah)

Michael Lerner, President and Co-founder (Commonweal)

Michael Lesnick, Senior Partner (Meridian Institute)

Ken Levit, Executive Director (George Kaiser Family Foundation)

Okendo Lewis-Gayle, Author (Harambe Entrepreneur Alliance)

Philip Li, President and Chief Executive Officer (Robert Sterling Clark Foundation)

Supriya Lopez Pillai, Executive Director (Hidden Leaf Foundation)

Bruce Lourie, President (Ivey Foundation)

Mario Lugay, Senior Innovation Director (Justice Funders Network)

Graham Macmillan, President (Visa Foundation)

Allison Magee, Executive Director / Board Chair (Zellerbach Family Foundation / Northern California Grantmakers)

Aditi Malhotra, Head, Monitoring, Learning and Evaluation and Knowledge (Yayasan Hasanah)

BJ (Goergen) Maloney, Executive Director (JP Morgan)

Jean-Marc Mangin, President and Chief Executive Officer (Philanthropic Foundations Canada)

Laura Manning, Executive Director (Lyle S. Hallman Foundation)

Jason Mark, Chief Executive Officer (Energy Foundation)

Tony Mayer, Board of Directors (Anthony and Delisa Mayer Family Foundation)

Lauren McCann, Executive Vice President (Stand Together Foundation)

Heather McCleod Grant, Co-Founder (Open Impact)

Kevin McCort, President and Chief Executive Officer (Vancouver Community Foundation)

Patricia McIlreavy, President and Chief Executive Officer (Center for Disaster Philanthropy)

Jonathan McPhedran Waitzer, North American Steering Group (EDGE Funders Alliance)

Sonia Melendez Reyes, Senior Media Advisor (Hispanics in Philanthropy)

Frances Messano, Senior Managing Partner (New Schools Venture Fund)

Tony Mestres, President and Chief Executive Officer (Seattle Foundation)

Adam Meyerson, President (Philanthropy Roundtable)

David Miller, Director of Marketing and Communications (Southeastern Council on Foundations)

Oronde Miller, Program Officer for Racial Equity (W.K. Kellogg Foundation)

Tulaine Montgomery, Managing Partner (New Profit)

La June Montgomery Tabron, President and Chief Executive Officer (W.K. Kellogg Foundation)

Ciciley Moore, Program Officer, Office of the President (W.K. Kellogg Foundation)

Ify Mora, Director of Program Operations (Margaret A. Cargill Philanthropies)

Selma Moreira, Executive Director (Baobá – Fundo para Equidade Racial)

Valerie Mosley, Chairwoman (Valmo Ventures)

Mary Mountcastle, Board member (Mary Reynolds Babcock)

Khalil Muhammad, Professor of History, Race and Public Policy at Harvard Kennedy School (Harvard Kennedy School)

Colette Murphy, Executive Director (Atkinson Foundation)

Kaberi Banerjee Murthy, Director of Program Strategy (Meyer Memorial Trust)

Lisette Nieves, Founding Partner (Lingo Ventures)

Allan Northcott, President (Max Bell Foundation)

Richard Ober, President (New Hampshire Charitable Foundation)

Grant Oliphant, President (The Heinz Endowments)

Clotilde Perez-Bode Dedecker, President and Chief Executive Officer (Community Foundation for Greater Buffalo)

Jim Pitofsky, Managing Director, Strategic Alliances (The John Templeton Foundation)

Louise Pulford, Chief Executive Officer (Social Innovation Exchange)

Dorothy Quincy Thomas, Independent Consultant

Brian Quinn, Associate Vice President, Research-Evaluation-Learning (Robert Wood Johnson Foundation)

Carlos Rangle, Vice President and Chief Investment Officer (W.K. Kellogg Foundation)

Favianna Rodriguez, Executive Director and Cultural Strategist (Center for Cultural Power)

Carmen Rojas, President and Chief Executive Officer (Marguerite Casey Foundation)

Katherina Rosqueta, Founding Executive Director (University of Pennsylvania Center for High Impact Philanthropy)

Diane Roussin, Project Manager (Winnipeg Boldness)

Adene Sacks, Co-Founder (Within/In Collaborative)

Joe Scantlebury, Vice President for Program Strategy (W.K. Kellogg Foundation)

John Schnur, Chairman and Chief Executive Officer (America Achieves)

Dave Scullin, Chief Executive Officer (Communities Foundations of Texas)

Jane Searing, Managing Director (Deloitte Tax LLP)

Steve Seleznow, President and Chief Executive Officer (Arizona Community Foundation)

Jessamyn Shams-Lau, Executive Director (Peery Foundation)

Paul Shoemaker, Founding President (Social Venture Partners International)

Shariq Siddiqui, Director (Muslim Philanthropy Initiative, Indiana University)

Tim Silard, President (Rosenberg Foundation)

Lateefa Simon, President (Akonadi Foundation)

Ariel Simon, Vice President, Chief Program and Strategy Officer (Kresge Foundation)

Christy Slater, Program Officer (W.K. Kellogg Foundation)
Nicole Small, Chief Executive Officer (Lyda Hill Foundation)

Paula Sneed, Chairperson and Chief Executive Officer (Phelps Prescott Group LLC)

Brenda Solorzano, Chief Executive Officer (Headwaters Foundation)

Benjamin Soskis, Research Associate, Center On Nonprofits and Philanthropy (The Urban Institute)

Javier Soto, President and Chief Executive Officer (The Denver Foundation)

Joe Speicher, Executive Director (Autodesk Foundation)

Eric St. Pierre, Executive Director (Trottier Foundation)

Jeff Stava, Chief Operating Officer (Tulsa Community Foundation)

Kim Syman, Managing Partner (New Profit)

Jo Taylor, Chief Capability Officer (Paul Ramsey Foundation)

Nick Tedesco, President and Chief Executive Officer (National Center of Family Philanthropy)

Elizabeth Thompson, Founder and President (Cleveland Avenue Foundation for Education)

Michelle Tremillo, Executive Director and Co-Founder (Texas Organizing Project)

Casey Trupin, Director of Youth Homelessness Strategy (Raikes Foundation)

Melinda Tuan, Managing Director (Fund for Shared Insight)

Urvashi Vaid, President (The Vaid Group LLC)

Victoria Vrana, Deputy Director, Policy, Systems and Giving by All (Bill and Melinda Gates Foundation)

Aaron Walker, Founder and Chief Executive Officer (Camelback Ventures)

Jeff Walker, Chairman (New Profit)

Anne Wallestad, President and Chief Executive Officer (BoardSource)

Alandra Washington, Vice President for Quality and Organizational Effectiveness (W.K. Kellogg Foundation)

Elise Westhoff, President and Chief Executive Officer (Philanthropy Roundtable)

Kate Wolford, Former President (McKnight Foundation)

Bill Young, President (Social Capital Partners)

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