

Director's Report 2.22

I am excited about exploring and implementing the principles of Trust Based Philanthropy at FFA, especially after this month's education program. As you may know, I spend a portion of my time investigating best practices in philanthropy. There is a lot of momentum toward trust based philanthropy, which is very consistent with our own Quaker values, centering equity, and building relationships. I believe that FFA has aligned with many of the principles since inception, including building relationships that are transparent and responsive, seeking grantee feedback (and acting on it), and giving support beyond the check. Last year we simplified our application and reporting paperwork transitioning to conversations which were more engaging for board and grantee partners. I also did more homework on grantee organizations. This year we are exploring a more challenging principle, multi-year unrestricted grants. This connects directly to one of FFAs identified strategic objectives, exploring larger/multi-year grants. We need to figure out how these principles fit FFA, within the context of our priorities, values, size, operations, etc.

I have learned a lot about these principles and have more to learn. We can start in a limited way, selecting 1-2 well-known grantee partners who will do a "test run" with us as we learn. This practice will not work for all of FFAs grants. We can create broader parameters for the grant (eg this is for nutrition programs for aging adults) that ensure that the funds are not used for other purposes. We can still ask for reports on how the funds were used (but only ask what we need to know). Per Marylee, we can assure grantee partners of an "intent to give" which assures them of repeat funding, without making it a "promise to give." The underlying message is "we trust that you know what is most needed in your community and how to address it, that your organization represents and includes the voices of your community. There are many benefits to non-profits, such as flexibility, sustainability, emergency responsiveness, and having confidence that they can hire and budget to support new innovative programs. Power shifts.

As an example of how far my own thinking has evolved, I now think we should have sent funds to each of our grantees in 2020, telling them to use it in any way they needed to address pandemic challenges, no application necessary, although a very brief email about how it was used would be expected. I am grateful for the other granting organizations who are also exploring these practices and sharing ideas.

Administrative

I have focused on preparing for the Audit for Marylee and closing out 2021.

Sharing beyond the grant: I forwarded info on the 2021 Mather Award to Washington State University's new program in senior living management to Jane Mack, Sean Kelly and Emily Greenfield (Rutgers U). Appreciation expressed, Jane sharing with Penn State. Sent info on new mission of Victoria Fdn (Newark) to AFSC. Article on 5 reasons for community health workers was forwarded to Trinitas <https://www.thectac.org/2021/11/5-reasons-why-community-health-workers-are-the-future-of-care-for-serious-illness/>. Connections have been made between grantee partners as well.

I had a conversation with Emily Greenfield (**Rutgers School of Social Work**) to learn more about what she is involved with and how the Center on Aging is progressing. She is working primarily on data and knowledge sharing with an academic and policy focus. Much of her recent work has been with Age Friendly NJ, and she wonders if we would contribute to a future Age Friendly Fair (I was non-committal).

Nikki reviewed the **FFA website** for language that might not be inclusive. She gave a positive review and suggested a page highlighting a couple grantee partners. I will review several pages for updating. In looking at other organizations' websites I ask the board to consider including a list of Trustees (if not photos).

Jane Mack says **FSA** will not be doing a symposium this year. They will do a virtual annual meeting on Tuesday April 19 from 1-3. The keynote speaker is Ryo Zsun, Culture Guide for Zappos. Let me know if you want to attend.

News:

- PYM has hired a new Aging Support Coordinator <https://www.pym.org/welcoming-sheila-sorkin-aging-support-coordinator/>
- Lynnette Killen told me that the Ralston board is considering selling their building and becoming a foundation in aging. She was seeking insight from my experience and we hope there will be opportunities for collaborating in marginalized communities in Philadelphia. **NOT PUBLIC INFO** This raises a question for me about seeking another organization serving this community such as UUOutreach to do some of the work that Ralston was doing.
- Friends Village at Woodstown will be affiliating with Fellowship Senior Living – a not-for-profit, faith-based senior living organization located in N.J. Craig Petry will step down as CEO.
- Joe Conner has been promoted to Executive Vice President of Friends Life Care Partners. He will be responsible for the day-to-day operation of their two not-for-profit organizations, Friends Life Care Partners (parent company) and Friends Life Care (our continuing care at home plan). Carol Barber will continue to serve as CEO and President of Friends Life Care Partners but will shift her focus to some exciting strategic initiatives that are underway under the auspices of the for-profit subsidiary, Friends Life Care Consultants, Inc.
- Toni Kelly has been appointed Executive Director at The Hickman. She has been their Director of Nursing.

Attended: PEAK small funders, PEAK oral reporting, Endwell conference, CNJG Aging & Health collaborative, GIA end of life convening, PN program on Indigenous people, Ripple Fdn on the long view in philanthropy, ASA Ageism to Age Inclusion, CNJG Annual conference and meeting, Ziegler on Tech use among older adults, PEAK Small funders on demographic data and new action planner, C-TAC program on faith, trust, hope and advocacy (emphasis on need for partnership, reform and relationship building). PN executive forum, TBP evaluation, NJAAW housing options.

Take aways:

- There is a shift toward an intersectional approach, recognizing that there are many people who are left behind due to their race, gender, age, orientation, ability, etc. We will get further if we work together.
- Our “Impact” may be on the organization not the community.
- “Change happens at the speed of trust.” TBP is about redistributing power, learning for accountability, decision-making, long-term impact.

- A grant can be for a sector, not whole organization, but broader than a program (eg. this grant supports your organization's work with aging adults).
- Efficiency (practical) vs effectiveness (response to need, equity, addressing root causes).
- It is nearly impossible to do ethical investing in equities today, can do more toward community development funds.
- Your Mission is your standard for granting and investing.
- Look deeply at organizations and their staffing (having a person of color as CEO does not mean they serve the community, may be only person).
- Philanthropy Network CEOs heard from some (Scattergood among them) who are giving \$8-10,000 to all their grantees (under \$500K) for leadership development and (staff) wellness—well received.
- PEAK is exploring the intersection between data collection and trust based philanthropy. The data the grantee partner already collects may be sufficient to be assured that funds are serving the expected recipients.

Appointed to CNJG Advisory group on **Doing Good Better: Amplifying and Deepening Philanthropic and Nonprofit Partnerships**. Attended first meeting. Appointed to PYM Aging Granting Group.

Learning links (optional):

- On grantee partner reporting: https://www.peakgrantmaking.org/insights/the-tragedy-of-foundation-reporting-requirements/?utm_source=PEAK+Grantmaking&utm_campaign=1d71454954-PEAK+Weekly+11.19.21&utm_medium=email&utm_term=0_c620ac67b2-1d71454954-353566445&mc_cid=1d71454954&mc_eid=8cdb340d6a
- Ezra Klein show interview by Heather McGhee with Ai-Jen Poo on family caregiving https://www.nytimes.com/2021/12/07/opinion/ezra-klein-podcast-ai-jen-poo.html?campaign_id=2&emc=edit_th_20211208&instance_id=47209&nl=todaysheadlines®i_id=61767165&segment_id=76365&user_id=c50dee5b42b12d4196c2d1bd19be97d1
- Mather Innovation Awards <https://www.matherinstitute.com/senior-living-professionals/promising-practices-awards/> I was most interested in the second award to Granger Cobb Institute for Senior Living at Washington State University. They are collaborating to provide education for the next generation of workers in senior living. I forwarded this to Jane Mack, my contact at Rutgers, and Todd Engle.
- Advancing racial equity and racial justice in the context of grantmaking-PEAK https://www.peakgrantmaking.org/insights/support-racial-equity-racial-justice-funding/?utm_source=PEAK+Grantmaking&utm_campaign=f408b2d2b4-peak-weekly-2-4-22&utm_medium=email&utm_term=0_c620ac67b2-f408b2d2b4-353566445&mc_cid=f408b2d2b4&mc_eid=8cdb340d6a
- The United Nations is naming The Decade of Healthy Aging (2021-30), changing how we think, feel and act about ageing.
- <https://www.cnjg.org/events/trust-based-philanthropy-4d-webinar-series-session-1-using-trust-based-values-transform-your> CNJG is offering a 4 part series on trust based philanthropy, starting Feb 3. I did the series in the Fall, which deepened my understanding of TBP.

- Mather Institute Age Well Study (residents in lifecare communities)
https://www.matherinstitute.com/agewellstudy/?_hsmi=203260674&_hsenc=p2ANqtz-8nGitkWXHIRpdL9Mqliywxm7CMSpt-ykFCvDRAGY-WSfmu_PFlcz13yBh57ayHMGbsykCWL3Y3VRrZRJIXhdF8KYiaLzTlsrdyIUXsgu4XSwh65kk

Grant updates:

- Redirected: Proposal by a resident at a Quaker retirement community to fund their efforts to assess and plan greening of the communities.
- In development- Kendal working on some large scale workforce solutions ideas
- FSA intern profile: <https://www.fsainfo.org/fsa-blog/student-culinary-directora-journey-fsa-intern>
- I attended the opening of the Jaisohn Wellness Center in Lansdale, and was asked to give a few celebratory remarks.
- I visited the Friends Southwest Burial Ground in Upper Darby, seeing the memorial seating circle first-hand. I was stunned by the number of Muslim graves, and how most were people under age 40.
- I spoke with Ed from YSOP, who said they had only been able to do 2 in-person intergenerational projects. I said that the need for interaction is even greater now and suggested 4 activities that could be done over zoom (art, poetry, drama reading, memoir writing).
- Responses to converting reports into conversations have been very positive. I write up a summary and share it with them. A brief written report will still be expected at the end of the grant period.