



# Grantmaking transformed

How corporations and foundations are proactively adapting to sweeping societal change.

# Mass trauma, from racial inequity to disasters and a pandemic: The impetus for changing how we respond

Events of the past few years including the Black Lives Matter movement and a global pandemic have shaken many elements of global society. They've also placed tremendous strain on philanthropic foundations that are working to address these monumental issues. Many corporations and foundations have risen to the challenge. They've reimaged and realigned their philanthropy efforts to become more proactive in addressing ever-evolving needs. This eBook details today's societal landscape and provides strategies for adapting philanthropy efforts to achieve maximum impact.

## COVID-19: A catalyst for change

In April 2020, Exponent Philanthropy and PEAK Grantmaking fielded a survey to see how grantmakers were responding to the COVID-19 pandemic and its impact on their communities, grantees, and internal operations and processes.

The survey found that 79% were following an alternative funding approach to meet the needs of global issues. And 55% were collaborating with other grantmakers, most often through combined relief funds and preferring local funds. Mass trauma, from racial inequity to disasters and a pandemic: The impetus for changing how we respond rather than national or global ones. Another 20% were considering taking such a collaborative approach.

Grantmakers have also made changes to their practices, more than half are doing the following:

- Surveying grantees.
- Changing processes and timing of grants.
- Making funds and reporting more flexible.
- Having open conversations with grantees.





Overall, grantmakers have shifted strategies, collaborated with peers, streamlined applications, expedited approvals, and accelerated disbursements. Now, they're taking stock of the improvements that they've put in place during the pandemic and they're deciding whether to continue their revised practices.



We've proven to ourselves and our grantees that we can be nimble and responsive. Why shouldn't we do that moving forward?"

— Diane Brow | community foundation for south central New York

## Making inclusivity all-encompassing

The Black Lives Matter movement has become the largest social movement in the history of the U.S. Among foundations that have prioritized supporting BLM and advancing social justice, there is growing recognition that efforts need to be more inclusive. This goes well beyond identifying grantees and disbursing funds — it involves re-imagining philanthropic practices through a lens of inclusivity.

Foundations are removing arduous application processes as well as repetitive reporting requirements that create institutional barriers.

At a fundamental level, there has been a seismic shift in how funding decisions are weighed and made. Philanthropists are surrendering absolute control over funding priorities, grantee choices, and dollar allocations by engaging their communities' in these decisions.



It's not human nature to give up privilege, particularly if you feel it's hard-earned. But at the end of the day, we elites need to understand that, while we may be benefiting from this inequality, ultimately, we are undoing the very fabric of America. We are going to have to give up some of our privilege if we want America to survive."

— Darren Walker | president, Ford Foundation

[Watch more](#) of Darren Walker speak about philanthropy on 60 mins →

# New models for shifted priorities

As foundations act to forge tighter bonds with their stakeholder communities, two alternate models have emerged.

**Participatory grantmaking** cedes grantmaking power to affected constituencies. Fields such as community organizing, deliberative democracy and community development have drawn on public engagement for decades. Now, the philanthropy sector is joining the ranks of public management, environmental conservation, journalism and higher education that are adopting these practices and soliciting more active involvement from the public.

**Trust-based grantmaking** acknowledges the systemic inequities in the accumulation of wealth and control over how it is redistributed. It addresses the systemic, organizational and interpersonal power imbalances between funders, nonprofits, and served communities in order to create a more equitable model for philanthropy. This embraces elements such as multi-year unrestricted giving, streamlined applications and reporting. The core focus for participants is building relationships based upon transparency, dialogue, and mutual learning.



The ability to be agile and responsive with our corporate giving programs allows the Levi Strauss Foundation to live our philosophy of ‘profits through principles’ and effectively support our causes.”

— Jason McBriarty, | director worldwide affairs, Levi Strauss Foundation





# Embracing transformation with Bonterra Corporate Social Responsibility (CSR)

Bonterra (formerly CyberGrants) has decades of experience in partnering with many of the world's largest, most respected, highly focused and purpose-driven corporations and foundations. Bonterra Grants Management helps these organizations deliver the greatest positive impact to the causes they support. At its heart, Bonterra is a community of passionate innovators fueling a proven workflow engine that's built for giving. Bonterra CSR's Grants Management has the flexibility and capabilities to support new and evolving grantmaking models.

## Process support

- Provides a flexible workflow engine that supports quick decision-making with multiple stakeholder input, fostering equitable participation and funding.
- Leverages standardized and simplified applications for health, socio-economic, or natural crises allowing organizations to take immediate action.
- Offers capabilities for managing and offering multi-year, unrestricted funding, alongside programs with more restricted eligibility.

## Performance measurement

- Provides Insights dashboards and data exploration capabilities to enable greater transparency and deeper understanding
- Enables automated impact reporting.



## Nonprofit participation

- Facilitates inbound email processing for efficient, multichannel two-way communication with nonprofits and other stakeholders, such as community members.
- Supports ongoing interactions post-funding, or over a multi-year granting period — relationships extending beyond writing a check.
- Provides impact report approval workflow which guarantees that the right people have reviewed submitted progress reports and have signed off on them in the correct order.
- Powers community-engagement support for equitable participation in decision-making including power-sharing, consulting, and joint efforts for long-term impact.

“Over the years, we’ve worked closely with our customers to understand and implement the capabilities they need to expedite workflows and manage their relationships. We’re continually inspired by their efforts to help the world deal with sweeping societal change and our platform will always flex to support them.”

— Mark Layden | CEO, Bonterra



# Bonterra Corporate Social Responsibility

Bonterra Corporate Social Responsibility is for companies and foundations looking to unify and scale their CSR initiatives, build and inspire a culture of purpose and belonging, and maximize social impact.

## Our solutions allow organizations to:

- Unite your CSR initiatives into one system.
- Drive deeper engagement with employees and build a culture of purpose and belonging.
- Give with the confidence that compliance requirements are being met.
- Create and share compelling, data-driven stories of social impact.

## Our Solutions:

- Grants Management
- Giving & Matching
- Volunteerism
- Research Grants
- Medical Education
- Managed Access
- Government Grant Management

To learn more and explore what is possible with Bonterra, visit [bonterratech.com](https://bonterratech.com).



## 50%

Fortune 500 companies leverage Bonterra Corporate Social Responsibility solutions.



## \$6B+

in grants were awarded to CSR customers in 2022.



## \$29.7M

was raised by employees of companies that led GivingTuesday initiatives.