



Sharing Power in Philanthropic Relationships to Enhance Impact

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Student Experience Research Network (SERN; formerly Mindset Scholars Network) worked from 2015 to 2023 to cultivate and bring greater attention to research on how structures (i.e., practices, policies, and norms) shape students' experience of respect as valued people and thinkers in school. In partnership with a community of 42 researcher members ("SERN scholars") and over 500 actors across research, practice, policy, and philanthropy, SERN bridged long-standing silos to build and mobilize practically relevant research knowledge. This document was developed as part of SERN's strategic sunset in 2023 with the intention of sharing lessons from our work that we believe will be useful to others in the field.

Given how influential philanthropic priorities and resources are, and how much competition there is for funding, philanthropic funders hold substantial power in the field of education.

A key priority for SERN in our funder relationships was acknowledging this dynamic head on and working together with our funders to share power within our relationships and throughout the broader ecosystem. These productive, mutually supportive relationships played an important role in facilitating SERN's growth and impact.

EXAMPLES AND RESOURCES LINKED IN THIS BRIEF

- [2021 report](#) and [2023 article](#) by The Bridgespan Group on how philanthropy can support systems change through field catalyst organizations
- [Blog post](#) about supporting the field-level enabling conditions for systems change
- SERN's [key messages regarding evidence and research use](#) and a [William T. Grant Foundation article](#), which can support funders in interpreting and using research
- [Materials](#) from the SERN Midcareer Fellows Program and a [William T. Grant Foundation article](#), which offer insights about how funders might promote shifts in academia that enable more cross-sector collaboration
- [Panel questions](#) from sessions at SERN's scholarly events involving funders
- SERN's brief on [accelerating the leadership and growth of early career scholars](#)
- [SERN Midcareer Fellows Program call for applications](#) and SERN's [2022 RFP external reviewer invitation](#), reviewer [guidance](#), and review [template](#)

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The impact of these bidirectional relationships was felt on both sides. SERN gained access to greater financial resources and non-financial resources essential to our work (e.g., strategic insights, education sector intel, brokered introductions, amplification, channels for influence). Our relationships also provided enhanced flexibility, which made it possible for us to pivot dynamically in response to lessons learned and changes in the field. SERN's funders gained access to valued knowledge—both substantive and process insights—as well as trusted thought partnership and new relationships outside of their typical networks, which enhanced their work and aligned with their internal organizational priorities. By working together in this way, we achieved greater impact.

This document shares takeaways and examples from our relationships with funders that we hope can support the development of more collaborative funder-grantee relationships that share power and effectively advance shared goals. The takeaways are targeted primarily to funders, who are frequently in a position to initiate many of the recommended activities. We hope that some of the insights might also provide individuals and organizations with additional strategies to integrate into their own approaches to relationship-building with funders. We encourage readers to reference the many other analyses and resources by practitioners, scholars, and funders who have written extensively about power and philanthropy.¹

Across SERN's funder relationships, we observed and used the following guiding principles. Below, we share insights, strategies, and examples related to each principle.

- 1. Ensure that structures are in place for funders to expand their networks and provide resources that are responsive to their partners' needs.**
- 2. Prioritize open communication and mutual learning.**
- 3. Advance field-level priorities by brokering connections and sharing and soliciting non-financial resources.**

1. How can funders expand their networks and be responsive to partners' needs?

Build equitable, transparent processes for starting new relationships in order to develop a diverse network of partners. Actively expanding their networks and initiating positive relationships with new partners, beyond the most well-connected and visible actors in the field, was a common topic with SERN's funders. By applying the lenses of equity and transparency, funders can better connect with the researchers, organizations, and other prospective partners best suited to address the needs and priorities of the families, communities, and educational settings funders seek to serve.

In general, ensuring that a broad range of identities, perspectives, and expertise are represented in funder networks for both formal (e.g., participation in initiatives) and informal (e.g., advice seeking) engagement is essential. The last section of this document includes related content about how SERN and our funders built connective tissue in the field by brokering connections.

- **Share insights with prospective partners.** As a funder, finding opportunities to share information about your organization's strategy and operations can foster connections with new audiences and democratize access to information about how to start partnerships. For example, funders shared valuable insights via panel discussions at some of SERN's scholarly convenings and fellowship events; [see example panel questions here](#). They also candidly fielded questions about how their foundations fund research during small-group meetings with participants in our early career fellowships.
- **Create inclusive, structured funding opportunities.** Issuing requests for proposals (RFPs) can also help to expand funders' networks. In the absence of an open RFP, funders are more likely to be contacted by those who have learned to proactively fundraise for their projects through personal experience and connections, which often correspond with structural advantages related to demographics, career stage, and institutional affiliation. Funders can also build capacity in the field for the development of strong project concepts and proposals by engaging in dialogue with applicants about their ideas as they develop proposals, offering feedback on proposals (regardless of whether they are funded), and providing planning grants. See the call-out box for additional considerations based on SERN's experience with sub-granting across several RFPs and fellowships.
- **Contribute to field-level efforts to increase transparency.** Making information about funding accessible (e.g., on [Candid.org](#)) can help prospective partners learn more about funding organizations and can also help promote broader transparency about resources and priorities in the field. Providing public descriptions that detail both what and who (e.g., including a researcher's name rather than just the name of the university) was funded can also aid transparency.

Ensuring that a broad range of identities, perspectives, and expertise are represented in funder networks for both formal (e.g., participation in initiatives) and informal (e.g., advice seeking) engagement is essential.

¹See, for example: [Decolonizing Wealth](#) by Edgar Villanueva; [Scott, 2009](#); [Power Moves](#) from the National Committee for Responsive Philanthropy; [Ming Francis, 2019](#) (featured in [Vox](#)); and the [Trust-Based Philanthropy Project](#).

Lessons from SERN's funded portfolios

We offer the following considerations for developing RFPs and expanding funders' networks based on SERN's experience with sub-granting across multiple RFPs and fellowships. Over the course of our existence, SERN re-granted over 40% of the \$19.4 million in total funds we received between 2014 and 2023 as part of our field-building efforts.

Relevance: Prior to designing the RFP, gathering upfront input from the target applicant pool on an RFP's topical focus and budget parameters helps to ensure that the call is relevant to their needs and the priorities they see in the field. Seeking feedback on the scoping and language of an RFP once it is developed, from a diverse range of prospective partners, can serve as a check to make sure it is clear and that they can see themselves in the work. It can also ensure that the ask being made of applicants in crafting the proposal is reasonable and respectful of their time. For examples of SERN's funded opportunities, see the [SERN Midcareer Fellows Program call for applications](#) and SERN's [2022 RFP](#).

Dissemination: SERN has conducted both open and closed calls for applications and we have found both useful for different contexts and strategic purposes. In both cases, dissemination of an RFP requires proactive outreach and sustained engagement with the pool of potential applicants. SERN engaged in a range of activities and initiatives (e.g., following up with people we met at research conferences and other organizations' convenings, inviting people to speak at and attend our events, hosting fellowships, serving on advisory groups, encouraging participation by early career scholars in our events and funded initiatives) to build relationships with people we hoped would be involved in our work and that of the broader field going forward.

We also used targeted outreach (directly to potential partners, as well as to people we had observed were well poised to share information with others in their networks)

to disseminate funding opportunities. Over time, shifts in SERN's programming and practices expanded and diversified our relational networks and translated into significant changes in the diversity of our applicant pools and awarded recipients.

Supporting the development of strong proposals: Strategies that make transparent the "hidden curriculum" for developing strong proposals include: publicly describing the steps people can take to build new relationships with staff, answering questions during the application development process (e.g., by offering access to staff; by creating and regularly updating an FAQ page), providing sample high-quality proposals, and sharing the criteria along which proposals will be evaluated.

Review processes: Internal and external reviewers both have useful lenses and important contributions in reviewing proposals, and weighing all reviews holistically can lead to strong funding decisions. Recruit a pool of reviewers that is diverse along multiple dimensions, has the specific expertise needed to assess proposals (e.g., topical expertise; sophistication in evaluating for equity), and represents all types of potential applicants (e.g., include both practitioner and researcher reviewers for proposals focused on research/practice collaboration).

Ensure that the rubric for proposals captures the quality of the proposed idea itself, not just the quality of the applicant's proposal writing and prior proposal experience. If questions arise about proposals, reach out to applicants to request additional information. In addition to enhancing reviewers' evaluation, this can help the applicant refine their presentation of the proposed idea. Offering feedback based on reviewers' input, regardless of the proposal's outcome, also helps build applicants' capacity and can continue to sharpen their approach. For examples of how we supported reviewers of SERN proposals, see the external reviewer [invitation](#), reviewer [guidance](#), and review [template](#) for our [2022 RFP](#).

Align funding structures with partners' needs in ways that can enhance their odds of impact. Partners need resources that are responsive to the type of work they do. Often, deeply relational work (e.g., authentically partnering with students and families in a research project or initiative; setting up communities of practice for continuous improvement within and across institutions) and field-building work (e.g., supporting partnerships between researchers and policymakers) are necessary for institutional or system transformation, but require significant time and resources. Funders can design partner sourcing and assessment, grants, reporting, and impact tracking structures to accommodate the necessary complexity and longer time horizon of this type of work.

- **Use responsive funding, measurement, and assessment strategies.** Providing multi-year, general operations funding that is attached to key objectives, but allows for flexibility in terms of how grantees accomplish those objectives, is a way to share power with partners, demonstrate trust, and optimize the capacity and impact they realize from an investment. SERN's funders provided flexible and repeated funding, and assessment approaches that enabled us to respond nimbly to evolving field needs and advance our learning as an organization. Nearly 80% of SERN's total funding came in the form of flexible core-style support. The Bridgespan Group published a [2021 report](#) and a [2023 article](#) on how philanthropy can support field catalyst organizations like SERN; the recommendations for funders may extend to other types of grantee partners, as well.

- **Provide dedicated time and resources for planning.** Both SERN and our funders benefited when funders provided SERN with time and resources for planning—both in the form of planning grants and also extending grant periods to enable significant planning phases. This improved the quality of project designs and partnerships, and facilitated more equitable and effective approaches, such as co-construction of programming with significant input from partners. It also offered opportunities to build stronger early relationships with our funders and share midstream insights we both learned from.
- **Consider resource needs in the field holistically.** Funders can also support the success of their partners by making aligned investments in the enabling conditions for their work in the field. For example, [shifting the structures in the education system that shape student experience can sometimes require catalyzing activities](#), including political organizing, legal casework, research, or communications campaigns.

Be responsive to the context in which partners work.

Funders can take steps to learn about the context in which different partners work and use these insights to better support partners. For example, SERN worked with our

funders to deepen their understanding of the structures and culture in which academic researchers work and how to use this information to support those who have been under-resourced, especially scholars from [minoritized groups](#) and early career scholars, as well as those engaged in equity-centered scholarship. We designed opportunities for funders and researchers to engage in ways that funders could learn directly from the questions and observations researchers wished to share with them. See the call-out box for additional lessons for funders partnering with researchers. SERN also communicated transparently with funders about our organizational context and role as a field catalyst—and asked for things that we needed and they could assist with. This positioned funders to provide more effective financial and non-financial resources to SERN.

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Lessons for funders partnering with researchers

Alongside our funders, SERN gained the following insights about how funders can approach partnerships with researchers.

Understand researchers’ needs. Funders can familiarize themselves with the constraints that researchers, especially those who are earlier in their careers and from minoritized groups, face within academia, and ensure that their investments are responsive to this context and coherent with the current norms and incentives within academia (e.g., funding a course buyout to provide time to complete a research project; ensuring that grantees and other researchers who funders engage can [“get credit” for their work in some way within tenure and promotion structures](#)).

Contribute to structural shifts in academia. Funders can think about the many ways they engage with the institutions and systems that uphold current academic norms and incentives (e.g., through expectations tied to grants, serving on postsecondary institutions’ boards, via their voice and public platform, contributions to centers and chaired faculty positions). Funders can consider these levers and touch points, and how they might use them

to promote change within academia in service of more practically relevant, interdisciplinary, and equity-centered work by researchers, especially those from minoritized groups. For example, this [resource](#) from the William T. Grant Foundation and [materials about the SERN Midcareer Fellows Program](#) offer recommended shifts in academia that can support greater connections between policy and practice actors and researchers from minoritized groups.

Develop a nuanced understanding of research use.

Funders can also familiarize themselves with broad principles that are helpful for interpreting research. For example, one frequent point of discussion between SERN and funders was that all research methods have strengths and limitations, and no research method is inherently more rigorous than another. For more information, see this [article](#) from the William T. Grant Foundation and a full list of SERN’s [key messages regarding evidence and research use](#). In addition to shaping which projects and which researchers receive funding, funders’ beliefs and behaviors in this area contribute to those in the sector as a whole, so developing a nuanced understanding of these principles can help enable high-quality knowledge-building across the sector.

2. How can funders and their partners engage in open communication and mutual learning?

Collaborate to build support for partners' work within the funding organization and with peers. Program officers need to advocate internally and sometimes with other funders in order to support a partner's work, and this process may be unclear to prospective grantees. As modeled by SERN's funders, candid conversations about the points of connection between the funder's strategy and the partner organization's strategy can set up a relationship for greater success. Even when there is not a complete strategic match between a funder and a partner, there is often a way to meet each other in the middle to take a step toward respective goals or a shared goal for the field. These conversations require trust and mutual vulnerability to determine where strategies are aligned and where they are not.

- **Work together to generate and provide feedback on materials.** When funders are clear with a partner about how that partner's work fits into their strategy and what the funder needs to fundraise internally (e.g., a concept brief outlining the strategic objectives and expected outcomes of the proposed work; answers to specific anticipated questions from colleagues or senior leadership about the project), partners can play a role in developing content that is both authentic to them and can also help funders build support for their work. Feedback from funders on these types of materials, as well as on proposals themselves—even if they are not awarded—can be a valuable learning opportunity and a means of contributing to transferrable capacity building among potential and current partners. It also signals respect for the time it took to prepare such materials.

Respect partners' time – and maximize capacity for reflection and learning – by streamlining administrative burdens across the grantmaking lifecycle. Many of SERN's funders invited SERN to submit materials (e.g., concept briefs, proposals, grant reports) prepared for other funders or internal purposes (e.g., detailed strategy documents), which communicated that they understood our time was best spent on our programmatic activities. Many also enabled us to use a shared set of metrics that reflected our organization's overall impact goals across our entire body of programmatic work. This streamlining saved us time and allowed us to put more thought and effort into fewer materials, which increased their depth and the quality of reflections and lessons learned we shared with our funders.

Engage in growth-oriented dialogue about both funders' and grantees' lessons learned. SERN held a 90-minute check-in with program officers from all four of our core funders two to three times each year. These were not pitch meetings, but rather a series of regular touchpoints to collectively reflect on midstream takeaways from SERN's work and discuss important questions as a group over time, within a context of growing trust. We sought feedback on our work and funders sought our advice on their strategies

in turn, based on our close working relationships with them and our role as an organization with deep expertise in research that also held a field-level view. In these conversations, our funders candidly shared constructive questions and reflections on their own work as we engaged in dialogue about SERN's lessons learned and field-level observations.

Similarly, instead of waiting to deliver a report with the results of a funded project once it was complete, we engaged funders periodically throughout major projects on a schedule that matched the flow of the project and served double-duty as useful pull-ups for our team, and shared challenges and lessons learned from design through implementation. During these conversations, we discussed with funders implications of these insights for their other investments and philanthropy more generally. These interim discussions advanced our team's thinking and the impact of our work.

This type of vulnerability can be particularly challenging in funder interactions, which are so often high-stakes for partners or prospective partners. Creating an environment in which this is possible required SERN's funders to model vulnerability themselves and explicitly communicate trust in our expertise (e.g., by asking for and acting on our input). They also needed to ensure that their funding structures did not penalize continuous learning or adapting to new information or circumstances. In our experience, this dynamic led to deeper partnerships and richer lessons that benefitted the field.

Candid conversations about strategy alignment, providing and seeking feedback, flexibility in reporting requirements, and authentic knowledge exchange are all strategies that funders can use to signal respect for and build trust with partners.

3. How can funders and their partners advance field-level priorities through their relationships?

Share and solicit non-financial resources that enhance each other's effectiveness. SERN's funders illustrated the many valuable non-financial resources that funders have to share, including their field-level perspective and the ability to convene diverse actors, broker new relationships, and advocate for organizations, people, and ideas in the sector. Funders are also often closely networked with other funders who can provide similar resources. In turn, partners can inform funders' strategies and approaches based on their lessons learned, knowledge of on-the-ground implementation and the perspectives of their constituents, and can also broker new relationships. In our experience, funders can empower partners to ask for what they need by emphasizing each partner's critical role in achieving change collectively in the sector and opening a conversation about non-financial resources that would support the success of the partnership.

Build connective tissue in the field by sharing information and brokering connections. SERN stayed apprised of trends, bright spots, and needs in the field by viewing content and attending conferences, webinars, and other events targeted to various groups (i.e., practice, policy, research, and philanthropy). Over time, the bidirectional relationships we developed together with our funders enabled a deeper understanding of our funders' priorities and networks so that we could share relevant information and broker connections, with our funders and also with their other grantees. Our funders did the same for us as they came to deeply understand our goals and approach.

- **Support successful introductions.** When possible, SERN and our funders supported the success of new connections by preparing both parties to engage productively (e.g., sharing background information about the new contact's expertise).
- **Consider which introductions to prioritize.** In brokering connections, SERN particularly sought out researchers who were doing high-quality, practically relevant research and could speak about their own work and the research in their field with education practice and policy audiences, and researchers who were positioned further from existing funder networks, based on being earlier in their careers, belonging to a minoritized group, or based on their scholarship being marginalized in the field. We also intentionally sought

out people who could play "connector" roles: those who had extensive networks, came to understand the role SERN played in the field, and could connect us further into various sub-fields. This type of field-building work is essential for funders and others to support and undertake.

Invest in convening and relationship-building in respectful, responsive ways. Funders can also advance field-level priorities by coordinating between organizations in their networks doing similar work and by providing time, space, and resources for field actors who are typically siloed to convene. When we observed this being done well, convenings were driven by partners' expressed needs, authentically collaborative, mindful of intellectual property, respectful of participants' time (and what can feel truly optional versus implicitly mandated) to avoid uncompensated labor, and designed and facilitated for equitable participation, so that attendees feel safe to learn and share insights. Given the power dynamics inherent in funder relationships, it can be helpful for funders to play a behind-the-scenes role or solely a financial support role in such convenings, with another organization facilitating or hosting.