

Philanthropic Toolkit for Transformational Systems Change



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Glossary of terms

Systems Change

A shift in the structures, policies, and cultural norms that define how power and resources flow within a system, addressing root causes of social and environmental challenges.



Relational Systems Change

Transformation rooted in relationships, focusing on how we connect, collaborate, and cultivate our interdependence with one another to create more equitable and compassionate systems.



Collective Healing

The process of restoring well-being across communities and systems by addressing historical harms, trauma, and disconnection, fostering shared resilience and interconnectedness.



Systems Storytelling

A process for pluralistic groups to come together to make meaning of systems they are seeking to influence towards equity and justice. The practice surfaces and amplifies the lived experiences, wisdom, and narratives of those impacted by systemic issues, offering new possibilities for change through the power of story.



Collective Power

The shared strength that emerges when individuals and groups come together, building solidarity and co-creating solutions to dismantle oppressive systems and uplift communities.



Sacred Systems Change

A holistic approach to transformation that honors the spiritual dimensions of social change, recognizing the sacredness of life, interdependence, and the need for connecting to sacred aspects of the human experience and deeper healing in systems.



FOREWORD

We stand at a pivotal moment, at a precarious time in human history. I truly believe that the convergence of wealth, innovation, and social consciousness can reshape the future that we fear into a future we can look forward to.

Rohini Nilekani President, Nilekani Foundation

Philanthropy has come a long way since the founding of the first U.S. foundation by Andrew Carnegie in 1911. And yet there is still so much that philanthropy can and must do for the sector to truly become a transformative force – a force that ushers in the level of innovation and social consciousness Rohini Nelekani yearns for.

What specifically will it take for philanthropy to become a transformative force? Like most things it's a work in progress.

The advent of strategic philanthropy in the early 2000s was helpful in moving the sector towards greater effectiveness. It caused philanthropists to focus on such important questions as:

- How do we create more intent with our philanthropy rather than simply giving to good causes?
- How do we think about the role of philanthropy beyond giving away money?

Beyond these initial questions, strategic philanthropy has incorporated additional useful perspectives for the field over the last three decades such as: the need to focus investments, the importance of achieving outcomes, and the value of scaling what works.

Yet, while these orientations have been helpful, strategic philanthropy, as it has developed and as it is practiced today, has also encountered some significant limitations with respect to supporting social transformation. A few of the limitations:

- With its focus on linear outcomes, the lens of strategic philanthropy sometimes fails to incorporate sufficient attention to the complexity of the issues it wishes to address
- Strategic philanthropy often orients to a competitive, zero sum game way of doing things which privileges individual success over collective progress
- As strategic philanthropy takes a 'bottom line' impact orientation to measurement, it often insufficiently weights the relational dyamics between human beings as factors for achieving social change
- Strategic philanthropy does not typically take into account a core understanding of how trauma, and people's responses to trauma, are a significant driver in social change outcomes

The tension many in philanthropy feel at present is that they are caught between two world views. A world view focused on deterministic impact caused by outside intervention, and an emerging consciousness world view that recognizes the complexity, interconnectedness and non-linearity of things.

Herein lies the rub - many philanthropists today feel pushed and pulled between these two worlds. And as they experience this tension they realize that a new paradigm for philanthropy must emerge, and is emerging. But they don't yet know what that will be.

While we ourselves have open questions about where the future of philanthropy is headed, we can posit a few of the critical contours we see emerging in a more transformative philanthropic paradigm.

1. An appreciation of the nuance and complexity of social change. This has implications for funder/grantee relationships, learning and measurement, and the philanthropist's stance in general. The more complex the world gets, the more philanathropists must resist the impulse to control. Attempting control in an uncertain world is understandable but usually not helpful, particularly in the long run. Think about a stance that privileges curiosity and connection.

An underappreciated dimension of complexity facing philanthropy is the role of trauma and healing. Trauma is a large presence in social change work. It is not a wise guide. Only through awarenes of trauma and a movement towards healing can transformation take place.

- 2. The ability for philanthropy to work collectively and to support collective action in their grantees and other stakeholders. An individualistic stance may feel like you are having more control but it can often be detrimental to the very cause you wish to support
- 3. Work on yourselves before you try to work on others. This is not about about naval gazing, but about working on your ability to be in right relationship with your environment colleagues, grantees, partners and others in your ecosystem.

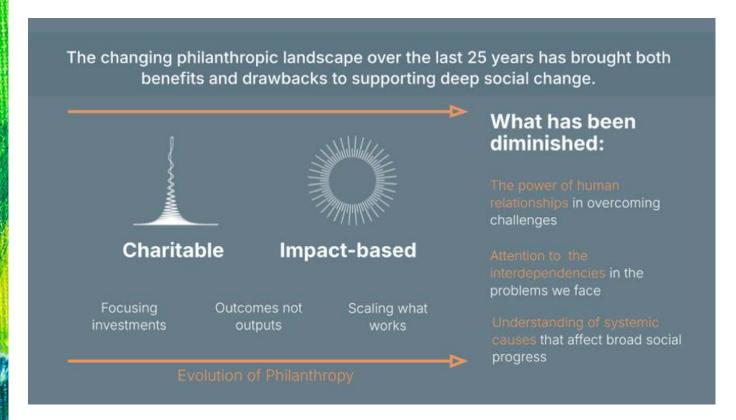
This is interior work, not internal work. Interior work is needed for everyone but it is particulalry important for philanthropy because of philanthropy's influence, money and power. Think about four forms of interior work:

- Practice Self Care: The healthier you are, the more room you will have to engage with challenges in an open hearted way
- Work to become a settled human being through grounding practices and trauma awareness practices that increase your understanding of your trigger responses to stress and trauma
- Grow your awareness not just about facts of your work but also of the energy and relational dynamics that are invisible to the eye but which greatly influence social change
- Grow your relationship to the spirit and presence that is greater than yourself. This can be religious or irreligious. A connection to nature seems essential

There is more to be said on the evolving philanthropic paradigm. As you read this you no doubt have some ideas of your own about where things are headed. We share our perspectives to encourage you to be forward looking as you consider your philanthropic stance and what it means to support transformation. This is about worldview. It is also about practicing – as in, not just thinking, but doing. In this toolkit we are providing what we hope will be useful practices relevant to social change and transformation that we have customized here for use by philanthropy. We hope you find the toolkit useful and we welcome any feedback!

John Kania
Executive Director
Collective Change Lab

PURPOSE STATEMENT

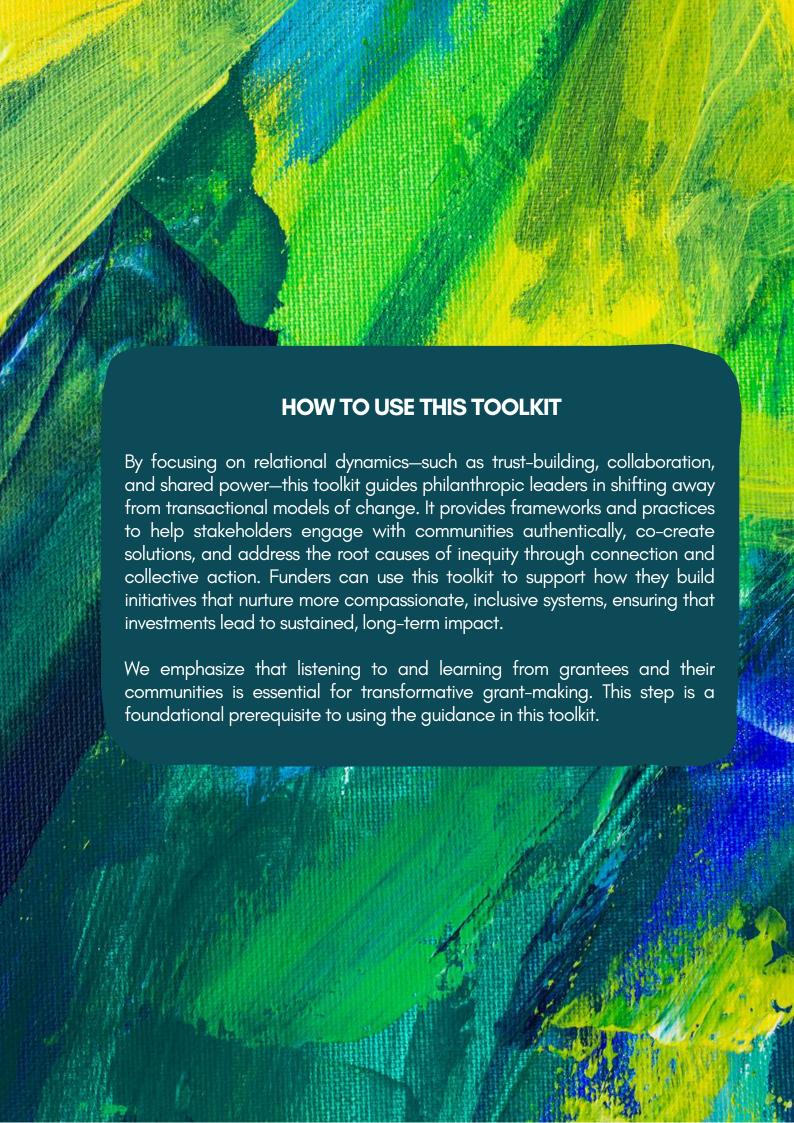


Many of the actors in the philanthropic industry that are engaged in the work of collective change are looking to move beyond incremental approaches to transformational approaches and wish to engage in more meaningful collaborative processes that positively impact a range of social issues. Many are unsure of where to turn. This toolkit is a nuanced, practical, and accessible way for the philanthropic community to interact and learn about the power of deepening relational dimensions of systems change work.

Despite an increase in philanthropy's orientation toward systems change, the know-how and direction of what it takes to achieve transformational change remains nascent. This nascency is characterized by: 1) the language of systems change being used without the collaborative and systemic orientations required to truly move systems into new ways of addressing social and environmental problems, 2) philanthropy still operating in issue specific siloes that do not acknowledge the interwoven nature of compounding societal challenges, 3) an unmet yearning for more relational ways to bridge increasing polarization and uplift ways of working that center people's interconnection and common humanity.

While shifts toward trust-based philanthropy are underway, we believe that more work to educate and engage donors on how to support transformational systems change is needed so that many more systems oriented efforts can emerge in the coming years. By strengthening philanthropies' orientation toward systems change we can catalyze a new era of giving that works to address the root causes of social issues rather than laying band-aid solutions on broken systems. The result will be deeper forms of giving that support long-term healing for communities most impacted by systemic injustices and inequalities.

We believe the right recipe for advancing the philanthropic industry involves combining inspiration with practical guidance so that philanthropic practitioners can move towards more systems orientations that center collaboration and relational ways of working. Importantly, this approach centers on educating philanthropic communities on transformational giving practices that are increasingly relevant to addressing intersectional social problems. Another dimension that is critical for advancing philanthropy is ensuring the insights and guidance provided is rooted in real-world practice from community practitioners and nonprofits that are ushering in a new era of social change. This toolkit serves to facilitate this transfer of knowledge by being a trusted bridge between local collaborative action and philanthropy.

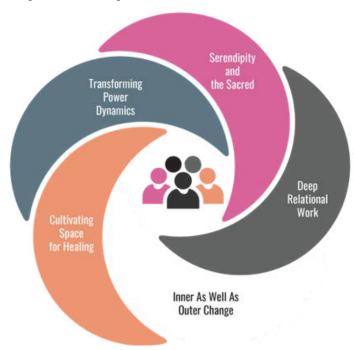


WHAT PHILANTHROPISTS NEED TO KNOW ABOUT TRANSFORMATIONAL SYSTEMS CHANGE

The Collective Change lab sees relational systems change as different from the prevailing, more mechanistic and structural mainstream views of systems change. Our definition encompasses dimensions of relational practice that elevate the potential for true systemic change:

- Focus attention and interventions on the **deeper, more cultural conditions of systems change** (e.g. power dynamics, mental models, relationships and connections) as well as addressing the structural conditions (e.g. policies, practices, resource flows).
- Engage system interveners in the work as part of the system, not separate from. In this respect, the relational orientation holds the expectation that internal change within the intervener is necessary for success of the intervention.
- Identify cornerstones of the work: 1) fostering deep relationships and interdependence among system actors and with the natural world, and 2) healing collectively within and among systems actors.

Together these dimensions contribute to a re-wiring of mindsets and behaviors towards a more systemic, relational, sacred and collective approach to social change that leads to more transformational and sustainable outcomes across global challenges.



Deep relational work: Establishing spaces in which groups feel interrelatedness and generative potential

Transforming power dynamics: Increasing collective power through expanding collective agency and shared values

Cultivating space for healing: Supporting people in identifying and sharing trauma(s) and working towards community healing

Serendipity and the sacred: Welcoming the sacred, love and emergence into the work

Inner as well as outer change: Changing oneself as a means to create change in the world

A simple truth of systems is that they are made up of people. Once we recognise that simple truth, it becomes obvious that a system's structures will continue to produce the same outcomes until we catalyze profound shifts in the ways of working and ways of relating among the people who make up that system.

TRANSFORMING PRACTICES FOR PHILANTHROPY



Collective Healing

"Broader awareness of and open discourse about individual, intergenerational, collective, and historical trauma in the systems around us have the potential to transform our social problem-solving efforts. Addressing trauma in our systems requires that we create space for social change leaders, teams, and collaborations to engage in understanding how the trauma inside us affects the problems outside us. It also requires that social change leaders, trauma experts, and trained and traditional healers collectively forge a common language; build trust, relationships, and alliances; and advocate together for integrating collective healing processes into the work of systems change."

Calderón de la Barca, Milligan, Kania Healing Systems Stanford Social Innovation Review, February 2024

For system change efforts to truly support equity and justice they must be healing-centered in their approach, actions, and outcomes. For philanthropy practitioners, collective healing is essential to dismantling the root causes of social issues. By supporting healing at the individual, community, and systemic levels, funders can contribute to more sustainable and impactful systems change.

In Collective Change Labs 2024 article, <u>Healing Systems</u>, we describe how deeper levels of systems change are often blocked by historical, collective, and systemic traumas. Healing these wounds allows for deeper collaboration and a shared vision for change. Philanthropists have a profound role to play in embedding collective healing into their systems change practice, facilitating and bolstering conditions for equitable, transformative change.

Recently, a series of case stories were developed to show at a detailed and nuanced level what is possible with collective healing that leads to systems change. Each of these five cases documents a different modality of collective healing, and each case results in changes to the conditions within systems that hold social problems in place. We recommend reading through these examples to grasp what is possible when collective healing is centered:

- Peace and Conflict Resolution in Colombia: Dunna
- Domestic Violence Prevention in California: Futures Without Violence
- A Nature Based Healing Approach to Systems Change in New Zealand: Haumanu
- Intergenerational Trauma in a Rural U.S. Community: Rural Opportunities Institute
- Racial Healing in Communities across the U.S.: Truth, Racial Healing & Transformation



We interpret collective healing as accessing the power of relationships to heal through an open-hearted, compassionate process that supports individuals and communities to:

- Recognize and integrate the harm done to individuals and respond with care and integrity for the harm done to others,
- Repair and transform the impacts left behind by the trauma into higher awareness, compassion, and learning, and
- Participate in finding new and more creative ways to thrive and collaborate with others in the community to achieve a higher purpose.

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Key Practices Philanthropists Can Engage for Collective Healing

Practices for Philanthropy	The Role of Philanthropy	
Objective: Recognizing The Transformational Potential of Collective Healing		
Engage grantees in conversations about the emotional and psychological barriers that may be affecting their work. Invite present day and generational harms into the conversation. Learn from practitioners who integrate healing and trauma-informed approaches into their systems change efforts. Examine the power dynamics within philanthropy and grantee relationships, recognizing where harm or inequity may exist in order to work toward repair and healing.	Foster a culture of openness and reflection, acknowledging the need for healing and supporting grantees in addressing trauma as part of their systems change work. Embed efforts that reduce systemic harm and help empower communities to engage in collective healing processes. Considerations: Philanthropy can help establish the conditions and resources for healing to be possible, but it must be done with humility and flexibility so that true healing is owned and stewarded in communities most impacted by systemic trauma. Healing must be intrinsic to philanthropy, not just external. Foundations and philanthropic networks are invited to undertake their own internal efforts of repair and healing.	
Objective: Integration Through Active Support of Collective Healing		
Fund organizations and collectives that incorporate healing practices such as restorative justice, community-based healing, or trauma-informed care into their programs.	Funders become champions of healing- centered systems change, investing in projects that integrate healing practices into their efforts to dismantle systemic injustice and inequity.	
Encourage collaboration between social change and healing practitioners, ensuring that grantees have access to resources that support mental, emotional, and community healing.		

Recognize that healing is a collective, place-based process; prioritize funding initiatives that support communal healing efforts alongside systemic interventions.	Considerations: • Healing-centered practices are often ancient and have lived in communities amidst ongoing oppressions. As such, it is important to honor existing healing practices and wisdom holders, especially in Indigenous Nations and Peoples.
Objective: Transformation Through Healing-Centered Systems Change	
Shift the narrative around systems change to include healing as a necessary and continuous process, especially for marginalized communities who have experienced deep systemic harm. Convene stakeholders across sectors to explore have called time healing again.	Lead a sector-wide movement toward healing-centered systems change, influencing how the field defines success and invests in long-term transformation.
to explore how collective healing can be a foundational practice for equitable systems change.	
Advocate for a systemic shift within philanthropy itself, encouraging other funders to adopt trauma-oriented, healing-centered approaches to grantmaking and impact measurement.	

- How can we integrate collective healing into our organization's grantmaking strategy to address historical and systemic traumas?
- In what ways can we actively support grantees in their healing processes, both within their communities and in their organizations?
- What internal practices might we adopt to ensure our team is also engaging in healing-centered work?

Relevant Reading for Philanthropy:



- Healing Systems: https://ssir.org/articles/entry/healing-trauma-systems
- Healing Centered Philanthropy: https://theimperativefund.org/healing-centered-philanthropy/
- The Future of Healing: Shifting From Trauma Informed Care to Healing Centered Engagement: https://ginwright.medium.com/the-future-of-healing-shifting-from-trauma-informed-care-to-healing-centered-engagement-634f557ce69c
- Healing Centered Funding for Systems Change: Link



Collective Power

Overview: Collective power is the shared agency and strength that emerges when individuals, groups, and communities come together. Unlike hierarchical or competitive models of power, collective power flourishes in relationships, trust, and shared purpose, dismantling oppressive systems and building toward a future where all can thrive. In systems change work, this expansive view of power requires a shift from seeing power as finite to understanding it as a regenerative force that multiplies through interconnection. Philanthropy can play a vital role in fostering collective power by aligning resources, influence, and practices to support collaborations that uplift community-led solutions and generate more equitable and sustainable impacts.

Purposes of Collective Power as a Transforming Practice

- **Strengthening Relationships:** To shift from transactional to transformational funding relationships, funders need to invest in authentic partnerships. This approach expands philanthropic influence not through top-down control but by fostering shared agency, mutual learning, and relationship-centered work.
- **Empowering Communities:** Funders should support structures and practices that transfer decision-making power to communities. When power is held collectively, it enhances local agency and self-determination, laying the foundation for lasting change.
- **Uplifting Marginalized Voices:** By valuing diverse perspectives, collective power breaks away from dominant narratives and allows philanthropy to work in solidarity with historically excluded groups. This approach creates a more inclusive and equitable sector that champions systemic transformation.

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Key Practices Philanthropists Can Engage for Collective Power

Practices for Philanthropy The Role of Philanthropy **Objective:** Recognizing collective power as a fundamental pillar in transformational systems change. This involves shifting the perception of power from something to be wielded to something that grows through shared agency, community engagement, and interdependence. Funders should review their own power Philanthropists take a step back, acknowledging intentionally creating space for dynamics, positional and financial power can community-led voices in decisionimpact relationships with grantees and making processes and funding communities. They might conduct strategies. Through open dialogues internal assessments to examine how and reflective practices, funders can power is currently exercised and how it start to redistribute power equitably. can be equitably shared.

Go beyond transactional interactions to foster trust, empathy, and shared purpose with grantees and community partners. Create spaces where funders and grantees can share perspectives, listen deeply, and establish meaningful partnerships.	
Objective: Integration to make collective goal-setting, participatory making models that empower grantees a	grantmaking, and collective decision-
Engage grantees and community leaders in co-designing funding strategies and criteria, ensuring they have direct input into how resources are allocated. Engage in power-mapping within one's foundation and within the wider network of change that grant-making is involved.	 Philanthropists can shift from conventional grantmaking to a model where communities are equal partners in the funding process. This involves moving beyond merely "supporting" communities to enabling them to lead and influence systemic change. Funders allocate resources for traumainformed approaches, restorative justice programs, and community-based healing initiatives that support grantees' mental and emotional resilience.
collective power as a core tenet of	nts that foster trust, adaptability, and
Support initiatives and structures that transfer sustainable power to communities, such as long-term, unrestricted funding, capacity-building grants, or participatory budgeting processes. Emphasize practices that enable grantees to take ownership of the work, thus creating lasting impact.	Philanthropy becomes a facilitator of collective vision and an ally in dismantling oppressive systems through giving up and sharing power. Funders act as connectors, amplifying community voices and mobilizing resources to support equitable transformations.

Transforming power dynamics is not a quick fix, but a continuous process that requires patience, perseverance, and a willingness to embrace vulnerability. It's about building bridges where there were once divides, and creating a future where everyone has a voice and a stake in the outcome. Even the most seemingly disparate groups can find common ground when they recognize their shared humanity and their interconnected futures.

- Maria Lucia Mendez L. Director, Peace Building at Ideas para la Paz

Activities to Support Collective Power

Activity 1: Relational Power Mapping Workshop

Description: In this workshop, funders and grantees collaboratively map power dynamics within their networks, identifying key actors, influencers, and potential allies in the systems they aim to change. This process helps funders and grantees understand existing power structures and how they can shift toward shared power.

Goal: Identify areas where collective power can be strengthened and where power-sharing opportunities exist within the current funding ecosystem.

Activity 2: Collective Story Circle

Description: Host a story-sharing circle where grantees, funders, and community leaders come together to share experiences and narratives about their journeys in social change. These sessions create space for empathy, understanding, and alignment on shared goals.

Goal: Foster a collective sense of purpose and strengthen relationships by highlighting the interconnected nature of social change work. Funders can gain insights into the systemic challenges faced by communities and the importance of collective resilience.

Resource Box for Collective Power



• Case Studies:

- 1. Peace and Conflict Resolution in Colombia Dunna: Demonstrates how collective power transformed societal narratives and fostered peace by centering community-led initiatives.
- 2. Racial Healing in Communities Across the U.S. Truth, Racial Healing, and Transformation: Explores how community-based racial healing efforts build collective agency and strengthen systems-level change.
- 3. The Transformational Power of Relationships. Juanita Zerda and John Kania. Explores the 25 year journey of community organizer, Californians For Justice, as the organization evolves from its community organizing roots to a highly influential player working both within and outside the system

• Articles and Readings:

- 1. "What is Power?" by Kristen Zimmerman and Julie Quiroz Discusses power dynamics and the generative potential of collective power.
- 2. The Four Faces of Power by Richard Healey and Sandra Hinson Examines how different forms of power influence systems and how collective power can counteract systemic oppression.

• Videos and Workshops:

1. Power Mapping for Systems Change (Collective Impact Forum) - A resource to learn about power mapping in systems work, with practical exercises for implementing in philanthropy.

- What changes can we make to our funding approach to foster more equitable power dynamics between funders and grantees?
- How can we amplify the voices of communities that have historically been marginalized in our grant-making processes in ways that support collective power?
- What systems or structures could be implemented to transfer decision-making power to community leaders and grantees?

Progress takes time, and bridging our existing gaps will be a long journey. But lived experiences, those authentic voices at every table, accelerate our progress. They foster respect and understanding, even in challenging conversations. We've harnessed this power, ensuring these voices are represented authentically. This approach, while seemingly simple, has been crucial, not just in small ways but also in tackling the larger systemic challenges we face daily.

- Salvador Lopez, President at K-Connect



Systems Storytelling

Overview: Systems Storytelling highlights the critical role of storytelling in collective systems change efforts. This practice focuses on expanding the capacity of leaders and organizations to use non-dominant, inclusive storytelling methods that foster collective meaning-making, deepening shared understanding within groups and between funders and grantees.

For philanthropy practitioners invested in social change, systems storytelling represents an opportunity to move beyond traditional narratives that often emphasize individual success or heroic leadership. Instead, it encourages a shift toward stories and relational practices that engage the complexity and interdependence of collective action, allowing funders to better support systemic change.

Purposes of Systems Storytelling as a Transforming Practice

- Understanding: To represent, empathize with and understand the multiple perspectives in a system.
- **Cohering:** To connect with a community of social change actors to make meaning together of what a system is and what it can become.
- **Imagining:** To activate creativity and deep yearnings that reveal future possibilities for a system; to find "in-between" places that exist alongside polarizing beliefs or worldviews.
- Re-narrating: To immerse ourselves in new narratives that drive a particular system transformation.

Key Practices Philanthropists Can Engage for Systems Storytelling

Practices for Philanthropy	The Role of Philanthropy
Explore the dominant narratives within your grantee community. Are the stories focused on individuals or are they centered on collective efforts?	Listen for narratives that go beyond individual impact and explore how systemic issues are being addressed through collective action.
Introduce grantees and partners to the concept of systems storytelling, emphasizing its importance in engaging the complexity of systems change.	

Begin asking about collective stories, not just individual success, in funding applications and conversations.	
Fund initiatives that emphasize collaborative storytelling, where grantees work together to co-create stories about their shared work.	 Funders become facilitators of collective storytelling, helping to build narratives that unify various efforts under a shared vision.
Encourage grantees to use non-linear and creative storytelling techniques to reflect the complexities of systems change.	INTEGRATE SYSTEMS STORYTELLING INTO YOUR SYSTEMS CHANGE LEARNING EFFORTS
Elevate stories that highlight interdependence, rather than isolated accomplishments, and seek out partners skilled in storytelling facilitation.	
Support ongoing storytelling initiatives that encourage learning and reflection across grantees.	Become a field catalyst advocating for systems storytelling in social change, using your influence to reshape how collectives make sense
Use your platform to shift the narrative within philanthropy, moving away from highlighting "heroic" founders and toward emphasizing the collective nature of social change.	of the change underway, how success is narrated and understood, and what it means to uplift narratives and voices often left out.
Engage with other funders to codevelop sector-wide storytelling frameworks that reflect the collective impacts of grantees, helping to build cohesion in the field.	

- How do the stories we elevate in our funding conversations influence the indications of success we prioritize?
- In what ways can our grantmaking reflect the interconnectedness of grantees' work rather than individual achievements?
- How might systems storytelling shift the way we think about measuring impact in collective systems change efforts?
- What types of storytelling techniques can better reflect the nonlinear and emergent nature of social change work?

When we tell stories of heroic actors and single-solution approaches we incorrectly identify agents of change, negate the contributions of others and frame our expectations about who and how social change unfolds.

Should we explore non-dominant alternatives? We think the answer is yes.

- Cynthia Rayner, Researcher & Storyteller

The way we structure stories influences how we think about organizations, social movements, collective action, and systems change.

- Nayantara Sen, Executive Director · Center for Story-based Strategy

We believe that one of the world's oldest technologies – storytelling – when employed in the service of understanding systems change, can provide a much deeper, multidimensional and dynamic view of how systems change happens



What system storytelling adds is the human aspect of feelings and emotions, and intentions. It embraces the messiness that human beings add to a system, and allows us to experience the system not just as an intellectual idea, but a reflection of the head, the heart and the will that shape the system.

The Powerful Role of Storytelling in Systems Change
by Philippa Namutebi Kabali Kagwa

Activities to Support Systems Storytelling

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- Collective Story Circle: Host a storytelling circle where grantees and funders share their experiences using non-linear storytelling techniques. This can help uncover the deeper, systemic forces at play and build a shared understanding of collective impact.
- Funding Collaborative Storytelling Projects: Develop a pilot grant program specifically
 aimed at supporting grantees and members of the system they are changing in telling their
 collective stories. This could include funding creative partnerships between artists, storytellers,
 and grantee organizations.

By incorporating systems storytelling into your philanthropic strategy, you help catalyze a shift in how the sector views and supports collective systems change, ensuring greater coherence amongst different parts of the system and opening space for new narratives and possible futures to emerge.

Additional Discussion Questions

- How might our storytelling practices change if we focused on collective, rather than individual, successes?
- What non-linear storytelling methods could help us reflect the interconnected nature of social change work?
- How can we use storytelling to foster empathy and understanding between our organization and the communities we serve?

Systems Storytelling Resources:

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- The Powerful Role of Storytelling in Systems Change
- Systems Storytelling Compendium
- Five Words that Shape Social Change (and how they limit us)



Sacred and Spirituality

Overview: Philanthropy often operates within rational, academic frameworks, while spiritual experiences and wisdom can feel far removed from these spaces. Prioritizing spirituality and the sacred in philanthropy can acknowledge the valuable and life-giving aspects of this core facet of the human experience, opening space for divine wisdom, serendipity, and emergence to arise. In a time where philanthropy is being called to strengthen its ability to release control and open deeper levels of trust, sacred and spiritual practices offer a pathway for philanthropy professionals to create spaciousness for new ways of being and showing up.

Imagine the transformative potential of deeper grounding amongst philanthropy professionals, deepening a sense of discernment for how resources are distributed and leveraged to meet any moment of need. Additionally, spirituality plays a critical role in fostering connection, resilience, and holistic understanding. Yet, it is often sidelined or viewed with suspicion within sectors dominated by rational frameworks, like philanthropy, policy, and research.

Over the last year, Collective Change Lab has undertaken extensive research into the role of spiritual and sacred work in social change in order to advance dialogue around how mainstream institutional social change culture is missing a critical dimension in social and environmental problem solving efforts in its de-legitimization of spiritual practices as a part of the process. Through this work we engaged a range of foundations and philanthropy professionals to understand where they see the greatest value in this work and the opportunities for the future.

Key messages for Philanthropy related to Spirituality and the Sacred include:

• Bridging Gaps Between Spirituality and Rationality:

Spirituality often feels disconnected from the rational and academic spaces where funding and research occur. For many marginalized communities, including Black American communities and Indigenous Nations, spirituality is a deeply ingrained and intrinsic part of identity, yet it is excluded from mainstream dialogues. This disconnection stifles authentic engagement with spiritual grounded communities and overlooks the role the sacred plays in motivating and sustaining social movements.

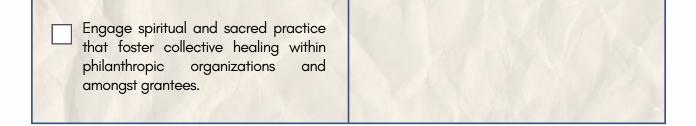
Spiritual Discernment in Philanthropy:

There's growing recognition within philanthropy of the need for spiritual reflection in grant-making. This involves a shift from valuing data-driven metrics to fostering authentic connection and trust within communities. Spiritual integration can guide funders toward a liberatory mindset, encouraging them to invest resources in line with their values rather than relying solely on traditional metrics that are often derived outside of communities being served.



Key Practices Philanthropists Can Engage for Sacred & Spirituality

Practices for Philanthropy	The Role of Philanthropy	
Objective: Recognition of the value of spirituality and the sacred in social change		
Assess whether your funding approach acknowledges diverse spiritual and sacred practices as integral to grantees' work.	Funders embrace a broad, inclusive definition of spirituality, creating a more open, sacred-centered funding landscape.	
Encourage conversations on how spiritual values inform work within and across grantee organizations.		
Shift narrative focus from individual success to sacred, community-centered impact in grant applications and reports.		
Objective: Integration of sacred and spiritual systems change practice into mainstream philanthropy		
Provide access to spiritual care, such as chaplaincy or spiritual guidance, as a resource for grantees and their teams.	Philanthropy can facilitate environments where grantees feel safe expressing spiritual perspectives and practices. Philanthropists normalize spiritual support as	
Encourage grantees to adopt practices that allow for spiritual reflection and reconnection, such as journaling, meditation, or communal gatherings.	part of organizational resilience, reducing stigma around these practices. Funders reinforce the importance of sacred practices that sustain grantees' spiritual well-being and resilience.	
Engage with other funders to develop sector-wide frameworks that center sacred values and spiritual practices in philanthropic work.	Consideration: Fund chaplaincy and spiritual guidance/support as part of a well-rounded support offering, especially during times of crises or transition.	
Objective: Transformation Through Sustaining Deep Sacred in Philanthropic Work		
Sustain internal and external exploration of the role of spirituality in philanthropy.	Funders prioritize collective storytelling that emphasizes interconnectedness and sacred responsibility.	
Leverage spiritual tools to release control and a need for certainty.	Consideration: Partner with philanthropic leaders to co-develop and promote sacred-centered practices, fostering a spiritually inclusive funding community.	



- How does our current funding model account for or exclude the sacred and spiritual dimensions of social change?
- In what ways can we engage with grantees who view spirituality as integral to their social change efforts?
- How can we shift our evaluation metrics to recognize spiritual and community-centered impacts, rather than only quantitative outcomes?

An expansive view of spiritual formation and movement looks like helping grow people into the that bigger WE. Starting from a place of radical deep love and hope, it helps transform conditions so that the experience of marginalization, of othering, and of oppression decreases and gives way to a new world order in which everybody has a place...

- Rev. Jen Bailey, Founder and Executive Director, Faith Matters Network

Sacred Systems Change Resources:

- Welcoming Spirituality & The Sacred Intro To Sacred Systems Change Guides
- Illuminating Spiritual Innovation Produced by Sacred Design Lab

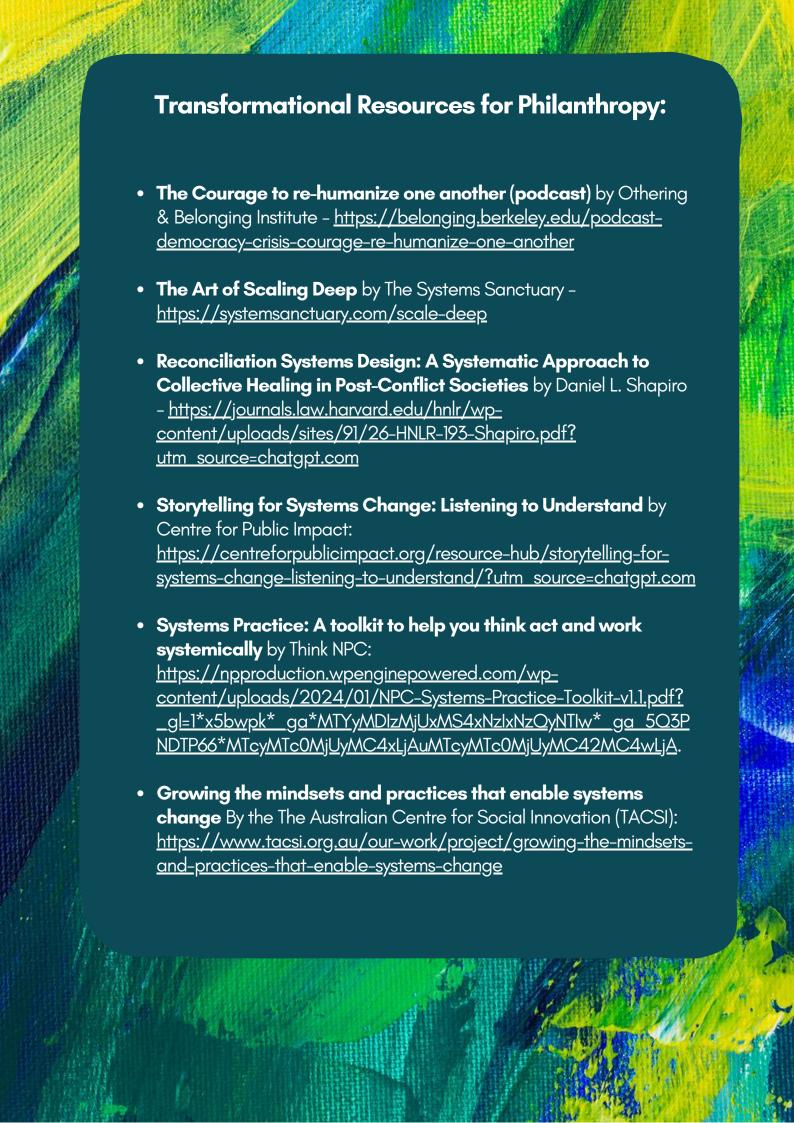




I am interested in how we create spiritually rooted movements.

What are the practices and gatherings that actually help a movement or an organization root themselves more spiritually?

Rev. Chelsea MacMillan
Sacred Activist



Acknowledgments and Invitation

We extend our heartfelt gratitude to all those who contributed to the creation of this toolkit on transformative practices for philanthropy. This resource reflects the collective wisdom, vision, and commitment of practitioners, grantees, donors, and leaders who are courageously exploring what it takes to create meaningful and enduring systems change.

This toolkit was made possible through the collaborative efforts of the Collective Change Lab and the generous support of Vanguard Charitable. We are deeply thankful to the individuals and organizations who shared their stories, insights, and practices, shaping this resource into a guide for action and reflection.

At its heart, this toolkit is not just a resource—it is an invitation. We invite the field of systems change to step into practices that honor our interconnectedness and to embrace approaches that go beyond transactional giving toward transformative, trust-based, and equity-centered philanthropy.

Together, we have the opportunity to reimagine philanthropy as a lever for systems change—one that supports healing, amplifies collective power, and nurtures sustainable social progress.

We invite you to explore this toolkit with curiosity and courage, and to join us in shaping new possibilities for how philanthropy can support the systems change our world so urgently needs.

We hope this toolkit has sparked new reflections and possibilities for supporting transformational systems change. We'd love to hear your thoughts, questions, or stories—reach out to us at **infoecollectivechangelab.org** to continue the conversation.