

I NEED INTERMEDIARY THAT CAN: Provide fiscal sponsorship and other financial management services; Advise on legal and regulatory matters. I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES: Strong fiscal controls and administrative capacity; Ability to work directly with funded projects, conduct due diligence, and manage grants. ASK: Does this potential grantee need only fiscal sponsorship or does it need additional financial and management assistance? What kind of fiscal sponsorship and other supports does it need? Does the organization want or need its own nonprofit status? Can the organization get help from an existing entity that provides fiscal sponsorship and additional services OR will two different entities be required? I NEED INTERMEDIARY THAT CAN: Regrant funds to many organizations efficiently; Manage/oversee all aspects of regranting at a large scale. I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES: Knowledge of and experience in developing, monitoring, and administering applications and managing grants for large philanthropic organizations. ASK: Is this a better use of foundation financial/staff resources than doing it ourselves? How many grants do I need help managing? Do I need help with just the administrative elements of regranting/reporting, OR do I need help with ongoing oversight/management of the grants? Or both? I NEED INTERMEDIARY THAT CAN: Assist organizations in navigating these processes; Be a liaison between applicants and foundation program staff to clarify issues and communicate concerns/information; Assist in developing evaluation measures/systems for assessing progress, outcomes, and other information helpful to both the foundation and grantees; Help staff clarify and convey internal administrative and evaluation processes so they are more easily understood by and transparent to external audiences. I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES: Knowledge of/experience with large foundations' internal programmatic functions and decision-making processes; Willingness to be transparent with and advocate for grantees/applicants when appropriate/needed; Problem-solving and mediation skills; Experience developing and implementing evaluation and other assessment processes. ASK: Which systems are most challenging to my grantee(s) and why? How much outside assistance might organizations need and how much can foundation staff provide to meet that need? Can I work with organizations to develop evaluation/reporting measures/processes rather than using outside help? Am I willing to let organizations design and conduct their own evaluations, including progress/outcome metrics? How can our foundation improve our internal systems to be more accessible, transparent, and less burdensome for organizations? I NEED INTERMEDIARY THAT CAN: Regrant funds to many organizations efficiently and expediently; Manage and oversee all aspects of regranting (especially to smaller organizations). I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES: Experience and administrative capacity to move funds quickly, especially to smaller organizations; Streamlined fund distribution processes; Flexibility in responding to changing circumstances; Proximity to/knowledge of the issue/region/constituency of interest. ASK: Are there potential risks to grantees that may be in crisis? If so, what can be done to ensure their safety? How much oversight, accountability, and risk are we asking the intermediary to assume? I NEED INTERMEDIARY THAT CAN: Absorb a layer of risk we cannot take on directly; Assess risk as part of a due diligence process, especially for new initiatives or projects; Provide ongoing monitoring to address red flags if/when they arise during the application process or grant period. I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES: Experience in (and tolerance for) complex and unpredictable circumstances; Ability to intervene with potential solutions when problems occur; Ability to manage the repercussions of "risky" grantmaking decisions and their effect in the field; Legal experience or knowledge of potential legal issues. ASK: What kind of risk am I looking at? Am I focusing on risk assessment/mitigation because I want to protect the grantees, the foundation, or both? Am I willing to have difficult conversations with grantees if/when there are red flags? Is there a process for brokering disagreements between grantees and staff if they occur? Is our legal staff able to step in if there are situations that require this kind of assistance? I NEED INTERMEDIARY THAT CAN: Research, identify, and conduct due diligence on these kinds of potential grantees; Incubate potential projects. I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES: Deep knowledge of and experience in a particular issue/region/constituency that is relevant to our strategy/goals; Ability to build, facilitate, and manage communication and relationships with diverse organizations and networks. ASK: Are smaller, local groups important to our strategy? To advancing the issue or field overall? Why and how? How can I avoid disrupting the field, causing unnecessary competition or distrust? How clear is our funding strategy to our intermediaries and/or potential grantees? Are we willing

to revisit that strategy if organizations recommend changes? What type of relationship do I want to have with an intermediary that is working with these organizations? With subgrantees? I NEED INTERMEDIARY THAT CAN: Build, nurture and coordinate strategic partnerships with organizations of all kinds that are essential to advancing issues and/or strategies the foundation is focused on. I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES: Has deep, trusted, and strategic relationships with constituent-led local groups; Experience and capacity to lead effective campaigns. ASK: What collaborative relationships exist among groups already doing this work? What is the potential/desire to build collaboration? If so, what kind of collaboration and with which organizations as members? I NEED INTERMEDIARY THAT CAN: Provide a funding mechanism that moves resources to infrastructure organizations supporting broader fields, issue areas, and/or sectors; Leverage our support through collaboration with other funders that invest in infrastructure; Help us develop a system for allocating a percentage of our grant budgets to infrastructure strengthening. I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES: Deep understanding of and experience with infrastructure building for various sectors, fields, and/or issues; Experience with and trusted by other philanthropic institutions that have engaged in this process. ASK: Where is there donor interest on this issue/region/constituency? What other funders are active in this space? What groups are they funding? Is there a funder collaborative that supports issues, fields, and/or localities (and their infrastructure) that already exists that we could join? I NEED INTERMEDIARY THAT CAN: Help us clarify these values and operationalize them across the foundation; Help use our power and influence to engage funders in shifting their practices toward greater equity; Share financial risk when funds may not come through by providing "floating funds" or cash advances; Build capacity-building support into grants. I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES: Ability to help organizations embed racial equity values and practices more seamlessly in every aspect of their work; Experience in working with larger philanthropic institutions to embed these values more deeply across the entire organization. ASK: Which organizations that have this kind of experience are most trusted in the field/region of interest? Are we clear about what we mean by "equity?" How are we operationalizing that in our systems and practices, including grantmaking? To what degree will we use equity as the criteria on which we base decisions about which intermediaries we will use? I NEED INTERMEDIARY THAT CAN: Work with foundation staff to examine internal systems and practices that may be burdensome to intermediary and community partners; Design relational approaches into the foundation's overall culture, grantmaking and policies. I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES: Familiarity with philanthropic systems and practices; Experience with change management in large philanthropic organizations; Willingness to be transparent and candid. ASK YOURSELF: Are some processes we assume to be standard self-imposed rather than necessary legal and financial guardrails? How can we reduce these to simplify application and reporting processes? I NEED INTERMEDIARY THAT CAN: Work with foundation staff and leadership to explore power-sharing issues; Work with foundation staff and grantees to cocreate clear parameters for grant oversight and accountability; Create opportunities for grantees and others to partner with us in developing and making decisions about strategies, grant funding criteria, issue priorities, evaluations, and other grantmaking processes. I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES: Experience in participatory, equitable, and liberatory philanthropic practices. ASK YOURSELF: What level of power am I willing to shift/share with people outside the foundation in the various components of grantmaking processes? Are we willing to make decisions together? Can we deploy resources in ways that do not disrupt the power dynamics that may exist among groups working on/in/with similar issues/regions/constituencies? Do we have a process for responding if such a disruption occurs? I NEED INTERMEDIARY THAT CAN: Facilitate communication among philanthropic and community partners; Share expertise about the issue/region/constituency; Offer services that are available in multiple languages, allow full accessibility for those who are differently-abled, and acknowledge that access evolves and requires ongoing communication and learning; Prioritize ongoing learning in alternative, non-normative organizational structures, leadership styles, and work practices; Use staff members who are trusted, directly representing, or in active allyship with constituents. I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES: Staff are directly representing and/or in active allyship with community partners, their issues, and their constituents; Skilled facilitators with strong equity values and practice; Trusted partner and convenor. ASK YOURSELF: Are foundation staff open and willing to devote time and attention to learning from community partners? Is there a commitment to ensuring that the lessons learned are incorporated into the foundation's overall strategy?

What are we doing to ensure that we are not gathering knowledge in ways that are disingenuous, extractive, or onerous for intermediary and community partners? I NEED INTERMEDIARY THAT CAN: Support movement and relationship building, leadership development, and coaching; Share equity-rooted human resource practices; Provide legal resources that include support for members of constituent-led groups undertaking high-risk action such as political disobedience or being attacked by groups that seek to discredit or harm their work. I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES: Demonstrated deep understanding of the unique challenges faced by people of color, youth, women, immigrants, members of the LGBTQ+ community, and other disenfranchised groups; Experience in equitable grantmaking processes. ASK YOURSELF: Why do we think allocating more resources to BIPOC-led organizations is important? What is our definition of "BIPOC-led?" How important is it that the intermediary's staff have lived experience with the issues/region/constituency we seek to affect? I NEED INTERMEDIARY THAT CAN: Build, nurture, and coordinate strategic partnerships with organizations of all kinds that are essential to advancing issues and/or strategies the foundation is focused on. I NEED AN INTERMEDIARY THAT HAS THESE ATTRIBUTES: Has deep, trusted, and strategic relationships with constituent-led local groups; Experience and capacity to lead effective campaigns. ASK YOURSELF: What collaborative relationships already exist among groups doing this work? What is the potential and/or desire to build collaboration and, if so, what kind of collaboration and with which organizations as members?