

What We Know, What To Do and Now We Pivot: Financing and Fund Development

April 23, 2025 | 3:00-4:30 PM EST

Presenters:

- Margaret Flynn-Khan
- Matt Billings
- Evelyn Michelman

Agenda:

3:00 PM	Welcome	Matt Billings, Margaret Flynn-Khan, Evelyn Michelman
3:05 PM	Introductions	Matt Billings
3:10 PM	What We Know: Federal	Margaret Flynn-Khan
3:20 PM	What We Know: Philanthropy	Matt Billings
3:30 PM	What We Know: Community	Evelyn Michelman
3:40 PM	How we plan	Margaret Flynn-Khan
3:50 PM	What To Do: Federal	Margaret Flynn-Khan
4:00 PM	What To Do: Philanthropy	Matt Billings
4:10 PM	What To Do: Community	Evelyn Michelman
4:15 PM	Question & Answer	Matt Billings, Margaret Flynn-Khan, Evelyn Michelman

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Presenters: Matt Billings, Margaret Flynn-Khan, Evelyn Michelman

Attendees:

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| ● Joy Davis | ● Liz Guillen | ● Britton Steele |
| ● Antonio Polo | ● Amanda Fixsen | ● Laurie Tochiki |
| ● Lisa Gary | ● Mary Lisa Penilla | ● Zaid Gayle |
| ● Dionisa Ortiz | ● Tiffany Madrid | ● Leon Aragon |
| ● Tracy Anderson | ● Rebecca Boxx | ● Ameber Moore |
| ● Ashley Reyes | ● Cindy Myers | ● Dr. Wanda Boone |

Welcome & Introductions

- Presenter Introductions
 - Matt Billings is the Deputy Director of the Children Youth Cabinet of Rhode Island (CYC), an intermediary organization that supports resident-selected programs and provides technical assistance among other supports. CYC focuses on scaling practices that center community voices, identity, and resident expertise. He is also the Founder of the National Race Equity Implementation Center, which is powered and guided by the work at the CYC.
 - Margaret Flynn-Khan works at Mainspring Consulting, and she has been focused on strategic financing for the Evidence to Success initiative from the beginning of the work. She has played a critical role in providing information, ideas, and tools to help organizations be proactive, and creating a community where colleagues can connect, support each other, and innovate during difficult times.
 - Evelyn Michelman works at All Faiths in Albuquerque, an agency that addresses trauma of all forms. She has 25 years of direct care experience, working predominantly with children and women and families who have experienced sexual violence. She has worked closely with systems like police, medical providers, Child Protective Services, therapists, and the FBI, but emphasizes her most intimate work has been standing directly with people experiencing crisis, supporting their healing and understanding their needs.
- The Community of Practice is evolving from a closed forum to an outward-facing process. These meetings will happen almost monthly for the rest of the year with each meeting having different topics connected to the Evidence to Success work. The goal is to create a "destination" where people can discuss practice, innovation, and how to move forward during uncertain times. Finance will be a critical element threaded through each topic.
- Matt invited participants to introduce themselves in the chat and share one thing they're optimistic about. Participant responses included optimism about:
 - The COP meetings and the outcomes that will be birthed.
 - Renewed spirit of collaborative effort, people setting aside fragmenting sub issues to build shared vision and resolve.
 - Disruptive resistance, both here with this group and what is mobilizing young people to respond to these challenging times.
 - The creative ways that we have found to be advocates in the new political climate.
 - People with differing viewpoints setting aside their differences and coming together at last.
 - The new resources and support that will rise in this challenging season.
 - The magic that happens when you gather teams together to 'be' and think together.

What We Know: Federal

- Margaret explained the federal funding landscape, focusing on the current budget structure with mandatory and discretionary spending. She detailed ongoing budget processes, including the reconciliation process and potential rescission package, highlighting proposed cuts such as \$880 billion from Medicaid over 10 years, elimination of the Social Services Block Grant, 10% reduction in TANF, and \$230 billion reduction in SNAP food assistance. The timeline for these potential changes suggests the reconciliation package might pass by August, with cuts potentially starting in October of the following year and being phased in gradually. Margaret emphasized that these are proposals, not guaranteed cuts, and the thin congressional majorities make full implementation challenging. She noted that social service agencies are likely to

see budget reductions, but the exact impact remains uncertain. Her presentation provided a comprehensive overview of the federal funding landscape, stressing the importance of tracking policy changes and preparing for potential financial shifts.

What We Know: Philanthropy

- Matt discussed the philanthropic landscape, highlighting key observations about funding in uncertain times. He emphasized that philanthropic dollars, across all levels, are insufficient to solve existing societal challenges. Matt noted an emerging trend of new entities entering philanthropic conversations, seeking replacement dollars for lost federal funding, though he stressed that no philanthropic source can fully replace significant federal investments like NIH or HHS grants. He predicts increased competition for limited philanthropic resources and advised organizations to be strategic, focusing on tight alignment with funding priorities and proposals. Matt observed that philanthropic entities are currently internalizing their planning, with a relatively muted response compared to previous crisis periods. He highlighted the importance of being prepared to act quickly on relief funds and differentiating oneself through clear, focused proposals. Matt also mentioned potential self-selection processes in applications, where additional requirements might naturally reduce the number of applicants. Organizations must be precise, purposeful, and aligned in their philanthropic funding pursuits, recognizing the challenging and competitive funding environment.

What We Know: Community

- Evelyn shared insights about the Albuquerque community's resilience and innovative responses to challenges. She described a community deeply rooted in historical trauma, with a strong distrust of systems and a tendency to turn inward during difficult times. Evelyn highlighted local initiatives like a food bank cultivating relationships with Mexican farmers to prepare for potential farm bill cuts, and the city's innovative Albuquerque Community Safety Response team. She noted how the community creates healing spaces, such as the Gateway Re-Entry Center and First Nations' talking circles, and the rise of traditional healing practices like sweat ceremonies. Evelyn emphasized how immigrant populations often seek healing within their own communities, creating grassroots support networks when feeling unsafe. She described a community that responds to uncertainty by building connections, co-locating services, and finding strength in cultural practices. This highlights the community's ability to innovate, support each other, and create resilient responses to systemic challenges, often drawing on deep cultural traditions and collective healing practices.

How we plan

- Margaret recommended a comprehensive approach to planning during uncertain times, focusing first on assessing organizational risks and financial management. This involves evaluating funding sources, particularly federal funding with DEI focuses, managing cash flow carefully, and preparing for potential credit needs. Organizations should prioritize by identifying essential stakeholder priorities and developing a long-term vision that considers what story they want to tell about their leadership and resilience. The second key strategy involves operational preparation and strategic communication. This includes maintaining robust staff performance review processes, conducting thorough scenario planning, and diversifying funding streams through private donors, foundations, and fundraising events. Margaret stressed the importance of developing clear, compelling messages about organizational value, creating a strong case for support, and being intentional about how the work is presented. Her advice is to remain proactive, maintain a forward-looking perspective, and view challenges as opportunities for innovation and growth.

What To Do: Federal

- In response to the federal funding landscape, Margaret recommended several strategic approaches for organizations. She advised tracking federal policy closely and engaging in active advocacy with state and local social service agencies. Organizations should assess their funding risks, develop comprehensive scenario planning strategies, and diversify their funding sources to mitigate potential cuts. She suggested maintaining strong relationships with state and local decision-makers and preparing detailed plans for potential budget reductions. Margaret emphasized the importance of being proactive, gathering good information for decision-making, and having clear processes in place for potential staff adjustments. She recommended organizations get clear on their priorities, understand stakeholder needs, and develop a strong case for support that demonstrates their value. Additionally, she suggested exploring various funding streams, including private donors, foundation funding, and potential collaborative opportunities. Organizations must be intentional,

strategic, and forward-thinking in preparing for potential federal funding changes, while maintaining a long-term vision and commitment to community needs.

What To Do: Philanthropy

- In addressing philanthropic strategies, Matt underlined the critical importance of alignment and clarity in fundraising efforts. He advises organizations to tightly align their proposals with funders' specific requirements, focusing on their core strengths and demonstrating how their work directly meets the funding priorities. He recommended being prepared to act quickly on relief funds, understanding that competition will be intense. He suggested organizations differentiate themselves by clearly articulating their unique value and purpose, rather than simply seeking replacement funding. Intentionality will be essential in how organizations present themselves, potentially using strategies like operating under a different business name, Doing Business As (DBA) if necessary. He stressed the importance of being proactive, reimagining approaches, and showing how an organization's work connects to broader community needs. Matt advised organizations to be ready with concise, well-crafted proposals that demonstrate their resilience and continued commitment to their mission. The key message was to be strategic, purposeful, and clear in philanthropic pursuits, focusing on alignment, innovation, and the organization's core strengths while being prepared to pivot and adapt to changing funding landscapes.

What To Do: Community

- Evelyn highlighted the critical importance of cultivating relationships with other providers and creating spaces of trust and healing. She recommended providers focus on building collaborative networks, such as co-locating services to make access easier for community members. Evelyn suggested providers should be intentional about creating environments where people can be honest, feel safe, and move forward with strength and alignment. She spoke on the importance of understanding and leveraging cultural strengths, recognizing that communities often have inherent resilience and survival mechanisms. She advocated for providers to listen deeply to community needs, create inclusive spaces like talking circles, and support traditional healing practices. She stressed the need to view trauma not just as a challenge, but as a source of resilience, and to create support systems that honor community expertise. Best practice is to build trust through genuine collaboration, respect cultural practices, and create responsive, flexible support networks that empower communities to heal and thrive on their own terms.

Question & Answer

- At the end of the meeting, several reflections emerged:
 - Dr. Wanda Boone raised the issue of trust in community collaboration, bringing to light that while everyone knows they need to be in community, lack of trust often prevents this. She shared her experience of forging relationships with other nonprofits and creating collaborative grant applications.
 - Leon Aragon discussed the importance of culture and resilience, stressing that trauma is not just about suffering, but also about survival. He relayed the need to explore commonalities across different cultural subgroups and reframe challenges as strengths. Participants agreed on the challenge of creating safe spaces where people can be honest and move forward together.
 - Overall, the discussion during the question and answer portion of this session touched upon the importance of building trust, understanding cultural nuances, viewing challenges as opportunities for innovation. Participants also discussed the complexities of community work and finding ways to move forward collectively despite challenges.