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Philanthropy

Forum 2024



Philanthropy Forum Takeaways

The 2024 Philanthropy Forum: People With a Purpose, presented by the Goldman Sachs Donor Advised Philanthropy Fund for Wealth Management, gathered a global community of over 300 philanthropic-driven individuals, nonprofit organizations, and family foundations.

Sessions centered on important topics, such as trends in grantmaking, engaging future generations in family philanthropy, building a network of like-minded donors, and creating, implementing, and assessing the impact of a philanthropic strategy. Attendees also experienced the power of convening a community to educate each other, spend time together, and be inspired.

This recap aims to curate actionable takeaways from the Philanthropy Forum. We hope the insights can help you maximize your impact across your philanthropic journey.

Key themes included:

1. Finding your purpose
2. Strategies to maximize philanthropic impact
3. Narrowing in: philanthropic causes in focus

FINDING YOUR PURPOSE

Philanthropic Compass: Starting, Structuring, and Optimizing Your Efforts

Jeff Kutash, co-founder and managing partner, Boldly Go Philanthropy
Kyle Peterson, co-founder and managing partner, Boldly Go Philanthropy

The founders of Boldly Go Philanthropy walked participants through their philanthropic compass, a tool developed to help families and individual philanthropists plan, structure, and execute their giving with greater impact, less fuss, and more joy.

According to Jeff Kutash and Kyle Peterson, there are three very meaningful and important reasons people engage in philanthropy: to bring family together around values across generations, to make a difference for people and the planet, and to build a legacy that extends impact into the future.

Together, the points of the philanthropic compass can help an individual or family identify their philanthropic “direction” or strategy. North is your identity: your vision, mission, and values; West is the impact you seek to make on the issues, places, and populations you care about; East is the approach you take: how you give and how you get involved in your giving; and South is the structure and governance underpinning it all.

Beyond giving, there are a range of tools available to philanthropists beyond gifting:

Philanthropists can improve the quality and the reach of the programs they support by commissioning research, helping organizations measure their impact, or sponsoring training and services for professional staff.

Philanthropists can wield their influence by bringing funders together, connecting organizations with government resources, or advocating for policy outcomes.

Philanthropists can use communications as a strategic tool to mobilize community action or catalyze collaboration between nonprofits.

Whether you are new to philanthropy or looking to increase the impact of your giving, don't be afraid to step forward. As a philanthropist, there are plenty of mistakes you should make, because they'll lead to learning and growth. The only mistake you shouldn't make is not stepping forward.



If you need direction, a compass is much more important than a map. Once you know where you're going, then the map, like a strategy, becomes awfully important. But starting with a compass can really help you determine what your philanthropy is going to look like and how it's going to work.

Jeff Kutash



Karey Dye, Semonti Basu, Joseph Lee, Nicholas Tedesco

Just Getting Started: Creating an Impactful Philanthropy Strategy

Semonti Basu, director, Insights and Impact, Michael & Susan Dell Foundation

Joseph Lee, manager, Assessment and Advisory Services, The Center for Effective Philanthropy

Nicholas Tedesco, president and CEO, National Center for Family Philanthropy

Moderated by **Karey Dye**, president, Goldman Sachs Donor Advised Philanthropy Fund for Wealth Management and the Ayco Charitable Foundation

Attendees learned the importance of approaching philanthropy with purpose, intentionality, and a shared commitment to lasting impact.

In the early stages of developing a philanthropic strategy, the key to success lies in embracing a sense of purpose and passion. Speakers suggested starting with causes that deeply resonate with your goals, values, and principles.

Speakers identified four guiding principles for effective philanthropy:

Accountability: Strategies, actions, and outcomes should be transparent, and inclusive of community stakeholders' feedback.

Equity: Focus on fairness, inclusivity, and creating opportunity.

Learning: Continuously seek knowledge and, take time to reflect on best practices to refine approaches.

Relationships: Be a partner who sets people up for success by leading with trust, curiosity, humility, and an openness to listen. Build and maintain strong connections with communities and partners, internally and externally.

Approach philanthropy with clear intention and purpose to maximize impact. Ask why, again and again to ensure alignment with your purpose.

Data measurement is key to effective philanthropy, but it doesn't have to create additional burden for grantees or grantors. Look to leverage data grantees are already collecting and/or collaborate with other funders to take advantage of data that the funders may already be compiling.

In family philanthropic endeavors, conflict is inevitable. Three tools to effectively manage conflict, include:

1. Embrace conflict and lean into dialogue rather than avoidance.
2. Build systems and structures to prepare for conflict, including codified decision-making practices and inclusion of third-party input to depersonalize disagreement.
3. Recognize the emotions created by conflict and embrace agility to reach productive outcomes.

People With Purpose: The Journey of Two Philanthropists

Roxanne Quimby, founder, Roxanne Quimby Foundation, Quimby Family Foundation, and Elliotsville Foundation, Inc.

John Simon, co-founder and board chair, GreenLight Fund

Moderated by **Meena Flynn**, co-head, Global Private Wealth Management, Goldman Sachs

Two philanthropists, driven by a deep sense of purpose, shared their journeys to making a lasting impact on the world.

As a first-generation philanthropist, John Simon learned purpose from his parents, who stressed the importance of living a life in service to others. He focuses his philanthropy on filling in “missing rungs on the ladder of opportunity.”

The GreenLight Fund starts each year by identifying a pressing need that hinders prosperity of the local community. It then searches for a program available in another community that’s had a demonstrable impact on the need. Finally, GreenLight provides the funding to scale the effective program in the new city, measures the impact of the program, and then reports on the impact to attract philanthropic investments from other funders for the next project.

Roxanne Simon approaches philanthropic funding like venture capitalist. GreenLight scales its funding by demonstrating “social return” from a single program to build trust. Simon said, “If you provide people a great return, hopefully they’re going to come back and reinvest in the next fund.”

Quimby’s purpose came from living close to the land and sharing the importance of a natural lifestyle with as many people as possible. She furthered this mission through her company, and eventually, her philanthropy.



Meena Flynn, Roxanne Quimby, John Simon

Quimby’s purpose permeated every aspect of her business, from the ecological packaging of Burt’s Bees to the mandate that all ingredients for every product be edible.

As the company’s success grew, Quimby saw herself as the steward of the customers’ investment in the company’s mission.

Quimby’s greatest fear as a mother was not passing on her purpose of living an intentional life to her children. The philanthropic structures she created, particularly the Quimby Family Foundation and Elliotsville Foundation, placed her children in decision-making roles to help instill a stewardship mentality. In the end, she “couldn’t ask for a better outcome.”



Purpose permeates every aspect of your life. It’s not possible to disconnect purpose from your activities. It all meshes together.

Roxanne Quimby



John Mallory, Alex Honnold

Alone on the Wall: A Conversation With Alex Honnold

Alex Honnold, founder, Honnold Foundation; only climber to free solo climb Yosemite's 3000-foot El Captain Wall

Moderated by **John Mallory**, co-head, Global Private Wealth Management, Goldman Sachs

The session featured insights into the mindset and motivations which led Alex Honnold to achieve daring free solo ascents of America's biggest cliffs and, donate 1/3 of his income each year to environmental initiatives.

Honnold says he was born with the same fears as everyone else. To overcome fear, he had to move to a mentality where actions that created fear become a normal.

Honnold was able to free solo El Capitan by broadening his comfort zone systematically. He trained repeatedly on the task at hand until it became routine, and he felt ready. After years of consistent effort, when he finally did his famous climb, it felt like a normal day.

Honnold credits his success to an ethos shaped around "elective hardship." He seeks out opportunities to do difficult things because he is inspired by doing them. When Honnold was living in his van with low expenses as a professional rock climber, he decided to donate a third of

his annual income and chose a foundation as the vehicle. Rather than giving to causes individually, he recognized his fame meant a public foundation could attract more attention and funding to the causes he supports.

The Honnold Foundation evolved over time to focus exclusively on trust-based partnerships with community organizations working to advance solar energy access. Honnold saw solar projects as a way to support impoverished communities and help the environment at the same time.

Each year, the foundation conducts an open call for grant applications from community organizations around the world. Communities often generate solutions the foundation never could have sourced on its own.

Honnold noted that many large-scale philanthropists he's encountered express an obligation to make sure their giving is as efficient as possible and often have difficulty giving the money away. He offered the audience another point of view to consider. "If you have abundant resources to give," said Honnold, "it seems to me you can be less stressed about doing it perfectly and just focus on all the good you can do if you give it faster."



I wouldn't have been able to do the things I've done without consistently pushing myself, without consistently doing things that were a little bit beyond what I had done before, that were just a little bit harder.

Alex Honnold

STRATEGIES TO MAXIMIZE PHILANTHROPIC IMPACT



Michael Bloomberg
Credit: Bloomberg Philanthropies

Perelman Performing Arts Center: A Vision for the Future With Michael Bloomberg

Michael Bloomberg, founder, Bloomberg LP; chair, Bloomberg Philanthropies; board of directors, Perelman Performing Arts Center; 108th mayor of New York City

Michael Bloomberg's plan to help rebuild lower Manhattan began 20 years ago, when he took office as the mayor of New York City just months after 9/11. His vision included a cultural performing arts center that would serve as a memorial, museum, and a place to celebrate life. Completed in 2023, the Perelman Performing Arts Center is the final public element to the rebuilt World Trade Center site.

In this session, Bloomberg shared insights from his decades of experience as one of the world's leading philanthropists.

It's easy to write checks. The real issue is how to support the organizations you fund so they actually perform and help the people you want to help.

One of the best ways to fundraise is offering a matching gift. There's something about sharing a donation with someone else that motivates giving.

There's a saying at Bloomberg, "In God we trust. Everyone else, bring data." It takes discipline to create data-based outcome reports which show the actual impact of a gift.

Giving to the arts can have an amplifying impact on communities. Culture brings capital more than capital brings culture.

When evaluating opportunities for arts-based philanthropy, focus on recipients with a differentiated offering who can draw artists and the public.

At the Perelman Performing Arts Center, every story grows out of its location at the World Trade Center. It was critical for the site to become a place both to grieve and celebrate life. [Watch this video](#) for more on the Perelman Performing Arts Center.



Perelman Performing Arts Center

Embracing Your Philanthropic Potential: A Conversation With Rob Kaplan

Rob Kaplan, chairman, Project ALS; co-chairman, Draper Richards Kaplan Foundation; vice chairman, Goldman Sachs

Moderated by **Tucker York**, global head, Wealth Management, Goldman Sachs

In this discussion, Rob Kaplan shared insights on the importance of finding personal passion in philanthropic endeavors and supporting social entrepreneurs. He emphasized the value of mentoring, coaching, and building relationships through philanthropy.

Kaplan looks at three key questions when evaluating a nonprofit. 1) Are they making an impact he is excited about? 2) Is there a leader in place who is passionate about the cause and willing to learn? 3) Does the organization have a model for delivering value with a chance to be sustainable?



The world needs your money. But what (nonprofit organizations) really need is your leadership. They need your insight — all the things that helped you become successful. You have great insight that they need.

Rob Kaplan



Tucker York, Rob Kaplan

Kaplan leverages an 80-20 rule when determining how to allocate his time and capital. Eighty percent of his activities are focused in a concentrated way on a small number of nonprofits. Through three-year sprints, Kaplan leans on his business expertise to help these organizations build the infrastructure necessary for sustainable growth.

The remaining 20% of his resources goes to supporting organizations championed by individuals in his personal network. His intention is to encourage his network to join boards and engage in philanthropy.

Philanthropists can learn from the outlook of venture capitalists, who tend to see the glass half-full. “Life is a lot better if you learn to say yes once in a while,” Kaplan said.

Business experience is a powerful tool to make a positive difference in the world. Social entrepreneurs need mentors and coaching. Kaplan stressed this was a good place for retiring business leaders to find purpose.



Ben Feller

Secrets to Success: The Art of Storytelling With Ben Feller

Ben Feller, partner, Maslansky + Partners

You can have everything else right — a great strategy, the right intentions, and the facts on your side — but if your language doesn't connect with your audience, it won't matter. Ben Feller shared his tips for finding exactly the right words to make audiences listen, care, and act.

In a national study titled *Philanthropy's New Voice*, 69% of people said they have positive attitudes about foundations, but 86% percent had moderate, little, or no knowledge about how foundations work. This articulates a storytelling issue across the philanthropic sector.

The first key to effective storytelling is changing your mindset. Feller shared a core philosophy from Maslansky + Partners: It's not what you say. It's what people hear.

When crafting messages internally and externally, it is important to have a clear definition of success. Common definitions of success in the philanthropic sector include

engaging donors who would not normally give, establishing a clear framework for deciding how to direct donations, and articulating the real impact of philanthropy on people's lives.

A clearly articulated narrative is key to effective storytelling for foundations.

The narrative should be grounded in the audience's perspective and answer the following questions in simple, clear, definitive, and bold terms: Who are you? What do you do? How is it different? Why should I care?

Use the four Ps of effective communication to evaluate language: Is it plainspoken? (easy to understand); Is it plausible? (easy to agree with); Is it personal? (easy to see and feel); Is it positive? (easy to like).

Plainspoken is especially key. Effective storytelling comes from making the complicated sound simple. Focus on clear, concise, and simple language that everyone can understand without jargon or technical terms. People fear what they do not understand, which opens space for critics to frame the issue.



If you're not telling your story well, people aren't listening to you and they don't know how (philanthropy) affects their lives.

Ben Feller

Place-Based Philanthropy: Focusing Charitable Responses to Make a Transformative Impact

Doug Bauer, executive director, The Clark, Scriven, and Fernleigh Foundations

Cindy Eggleton, co-founder and CEO, Brilliant Detroit

Tara Roth, president, Goldhirsh Foundation

Moderated by **Carra Cote-Ackah**, head, Philanthropy Engagement and Legacy Planning, Goldman Sachs Family Office

Three leaders shared their experiences guiding place-based philanthropy, which focuses on addressing the needs of a community rather than individual causes. Speakers stressed the importance of collaborating with the community, both formally and informally, to achieve successful outcomes.

Place-based philanthropy focuses on strengthening the structures in a community to drive impact across a multitude of causes, rather than a single issue. Success requires an intimate knowledge of the needs of the community because what works in one community may not work in another. When scaling a model to a new location, flexibility is required to match community-specific complexities.

To affect population-level changes in a community, it is important to target causes with a durable, measurable impact. Durable change takes time and is best fostered through collaborative initiatives where community stakeholders are active participants in the process. A long-term commitment of unrestricted funds can help organizations build the infrastructure necessary to sustain change.

Measurement should also be monitored over the long term. It is important to work with grantee partners to compile data on how many lives were touched and the impact made



Carra Cote-Ackah, Doug Bauer, Cindy Eggleton, Tara Roth

— but it is important to recognize that a primary purpose of measurement is to learn. There won't always be an upward trajectory across every success metric.

Humility is key for place-based philanthropists. Individuals living in the community typically have the most intimate knowledge of the issues they face. Input from grantee partners, fellow funders, government leaders, business leaders and the community is necessary to craft and adapt successful strategies.



Any time you want to do a place-based solution, you really need to have an intimate knowledge of that place, the history, the politics, the brands, the values, and the needs of the community.

Tara Roth

Advocacy is a crucial component of place-based philanthropy. Driving support and adding pressure for policy changes can increase the potential for broad impact and gain leverage on your philanthropic leadership.

Engaging Next Generation in Family Philanthropy: A Fireside Chat With Max Disney

Max Disney, trustee, Roy + Patricia Disney Family Foundation
Moderated by **Jeff Kutash**, co-founder and managing partner, Boldly Go Philanthropy

Attendees gained insight from Max Disney's experience navigating the multigenerational evolution of his family's philanthropic board.

Disney joined his family's philanthropic board at the age of 18, along with several of his cousins. Set by Disney's grandfather, the historic practices of the board meetings offered little ability for younger generations to participate and influence decision making.

When it came time for the next generations to take over, Disney was motivated to create more opportunities for broader family participation and inclusion. This became a reality through a series of honest and sometimes difficult conversations that led to the prior generation breaking from past practice, resulting in frameworks for defining the foundation's values, navigating conflicts, making decisions, and, importantly, involving every generation in the process.

The Disney family's process for working through intergenerational challenges not only improved the foundation's impact but also brought the family closer — creating stronger relationships and a shared philanthropic mission. Disney explained how family members are introduced to the foundation using an intentional onboarding process, starting at age 15 until



Jeff Kutash, Max Disney

they are allowed to join the board at 18. The approach offers small, consistent “breadcrumbs” — making the experience enticing, engaging, and most importantly, fun.

If you're having trouble engaging younger generations in family philanthropy, Disney suggests allowing them to make the call informing a grant recipient that they are getting funded. “The joy they will hear from the other side of the phone will get them hooked. Making someone's passion and vision possible is the best feeling,” he said.

Additionally, Disney emphasized the power of visible family philanthropy. Your gifts can be a lighthouse to a cause, issue, or group — there is an amplifying effect.

Disney also spoke to how the addition of expert staff led to increased impact and freed up board members to focus on governance.

Jeff Kutash closed the session by sharing three lessons for bringing the next generation into family philanthropy gleaned from his experience working with multiple families: 1) Engage younger generations as early as possible in the family's philanthropy 2) Provide role models and hands-on experiences to help the next generation learn by doing 3) Offer meaningful opportunities for input and leadership on the board and in the philanthropic work.

What's Now, What's Next: Trends in Grantmaking

Kevin Bennett, vice president, Financial Crime Compliance, Goldman Sachs

Emily Rasmussen, founder and CEO, Grapevine

Shelley Whelpton, senior managing director, Arabella

Moderated by **Amal Alibair**, region head, Mid-Atlantic Private Wealth Management and head, US Institutional Client Solutions, Goldman Sachs

Three panelists explored emerging trends in grantmaking, focusing on how innovative strategies, data-driven approaches, risk controls, and collaboration can help maximize the impact of charitable investments.

Collaboration in philanthropy is a growing trend. It has expanded beyond traditional financial collaboration to include relationship-building, shared knowledge, and tactical approaches such as advocacy.

Grapevine was created as a platform for donors to come together through giving circles to make a bigger difference as a group. Giving circles have expanded beyond their hyper-local roots to include cause-based and team-based circles across geographies, learning sessions, and educational workshops.

Giving circles can also provide a powerful opportunity for strategic, participatory philanthropy. Larger donors can leverage giving circles to amplify their impact for the causes and communities they care about by matching the gifts of hyper-local circles to small, underfunded organizations.

Leveraging digital tools and technology can help expand scalability and make it easier for people to come together and contribute in meaningful ways.

Philanthropists, particularly in the next generation, are increasingly focused on systems-level change and



A critical component to philanthropy is ensuring your dollars actually get to where you intend them and they're used for the purpose you intended.

Kevin Bennett

solutions. To affect this type of change, philanthropists' strategic approach often includes creating a giving framework, assessing the potential impact of opposing forces to that framework, and adjusting capital allocation based on the power and influence of those forces.

A decrease in focus on six-month change metrics in favor of "patient capital" over multiple years has sparked a recent shift toward trust-based philanthropy. This long-term focus creates capacity for the operations, leadership development, and support infrastructure needed for systemic change.

There are a number of risks associated with grantmaking, including fraud and financial crime risks, such as money laundering, terrorist financing, bribery and corruption, and sanctions. Awareness is key to mitigate risk, which can be created through implementing internal controls, policies and procedures, and appropriate training of staff. Due diligence on intended donee organizations and donor funding sources alike is also important to avoid exposure to financial crime.

NARROWING IN: PHILANTHROPIC CAUSES IN FOCUS



Alisha Ballard, Una Osili, Jennifer Valoppi

Catalyzing Change: Giving to Women’s and Girls’ Organizations

Alisha Ballard, president and executive director, Living Legacy Foundation; co-founder, EqualizeHer and Inherit the Music

Noah McMahon, founder and CEO, Anonymous Philanthropy

Una Osili, associate dean, Research and International Programs, and Efroymsen Chair in Philanthropy, Indiana University Lilly Family School of Philanthropy

Jennifer Valoppi, founder & president, Women of Tomorrow Mentor and Scholarship Program

Moderated by **Jessica Taylor**, national director, One Million Black Women, Goldman Sachs

The session focused on the importance of philanthropy in driving transformative change for women and girls. Speakers discussed initiatives and organizations focused on addressing gender inequality.

Philanthropy can help break generational cycles of violence, poverty, and abuse by uplifting the young women who are raising the next generation. This can have a ripple effect across communities.

A number of organizations focus on helping young women understand the career opportunities available to them as a means of driving transformational change in historically male-dominated industries.

Research has become a foundational resource for understanding the issues that attract the most funding and the gaps in gender-focused philanthropy. Less than 2% of the billions of dollars raised in the United States go to women's and girls' causes, according to data from Indiana University's Lilly Family School of Philanthropy.

Giving circles can be an effective tool for finding and supporting local organizations that make an outsized impact in the community. Seventy percent of all giving circles in the United States are female giving circles.



In these very turbulent times we live in, I see a lot of possibilities. Donors are responsive to some of these shocks ... Also, there are great opportunities to bring a gender lens to some of the newer topics in philanthropy, like climate and environmental justice.

Una Osili



Stacy Mullaney, William Smith, Michael Levin, Ginny Ehrlich



Sports help us learn values that we may not always be discovering in the classroom, like empathy, respect, humility, perseverance, and discipline.

William Smith

Stepping up to the Plate: Improving Lives Through Sports

Ginny Ehrlich, CEO, USTA Foundation

Michael Levin, CEO, Harlem Lacrosse

William Smith, founder and CEO, Charter Oak Advisory

Moderated by **Stacy Mullaney**, global head, Goldman Sachs Family Office and head, Goldman Sachs Trust Company, NA

Speakers discussed the role of sports as a powerful metaphor for life and a vehicle for driving personal development and educational equity.

Sports programs are a powerful tool for addressing critical social issues such as childhood obesity, food insecurity, mental health challenges, and more.

Beyond promoting physical fitness, sports provide a platform for teaching essential life lessons and opening doors to opportunities that might otherwise be out of reach — especially for young people in under-resourced communities. Through sports, participants can gain access to experiences that foster personal growth. Moreover, sports uniquely bring people together, strengthening communities and building connections across diverse backgrounds.

Through scholarships, sports can open pathways to college for communities where it otherwise might not be available. The success of an individual student can serve as a role model for other students to follow, creating a transformative impact over time.

Stimulating the Mind and Heart: Supporting the Visual and Performing Arts

Milena Adamian, president, Teatro alla Scala Association of America

Kristy Edmunds, director, MASS MoCA

Abby Pucker, CEO, Gertie

Moderated by **Monica Heslington**, head, Family Office Art and Collectibles Strategy, Goldman Sachs Family Office

Panelists discussed how philanthropic support of the arts is vital in strengthening communities, promoting education, and achieving an overall positive economic and social impact.

The creation of MASS MoCA on a derelict 16-acre factory site demonstrates the transformative power of art in a community through re-instilling a sense of optimism and possibility. Arts connected the city of North Adams to the creative economy following the collapse of manufacturing. A world of artistry and a new generation of locals are building vibrant futures in this resilient and evolving community.

Chicago sometimes has a negative narrative around safety, segregation, and disinvestment that obscures the assets in the city. Through engagement with community organizations, arts are being used to reshape the narrative, and in turn, change the city's economic reality.

Similar to how community-violence intervention has become a public health issue, the arts can be considered a key component of driving economic development and mental health outcomes. This shift in perception can help unlock additional sources of governmental and institutional funding for the arts.



Recent scientific behavioral studies have shown with very clear data that engagement with the arts has a positive impact on physical well-being, mental health, learning, and cognitive skills. It also helps build community.

Monica Heslington

Philanthropic support can help make performing arts accessible to young generations for early exposure and development. Engaging the next generation is the key to preserving and continuing to enrich the world's cultural heritage.

To help facilitate the introduction of the next generation to the world of the arts, consider supporting programs that evolve traditional formats. The American Association of Teatro Alla Scala produces performances written specifically to engage children that are about an hour in length. They also focus on modernizing delivery with new media.

On a Mission: Creating a More Equitable Outdoors

Eric Artz, president and CEO, REI Co-op

Juan D. Martinez Pineda, deputy director, Aspen Institute Forum for Community Solutions

Lucas St. Clair, president, Elliottsville Foundation, Inc.

Moderated by **Kyle McCoy**, private wealth advisor, Goldman Sachs

Panelists discussed the fundamental importance of human connection to the outdoors and how philanthropic efforts to support environmental causes can help strengthen the health and well-being of communities.

Environmental initiatives can have a transformative impact on at-risk youth. A direct connection to the outdoors creates a 30% increase in social-emotional learning. Very few other avenues can create the same level of impact on this population. Philanthropists and organizations can help support community-based nonprofits by sharing best practices and resources that make it possible to tap larger funding sources. Federal grants are available for issues like food insecurity, but if a nonprofit doesn't know they are operating in that space, have the resources to apply for a grant, or have the ability to measure their



Collaboration across sectors is essential to ensuring every community has a stake in a healthy outdoors.

Juan D. Martinez Pineda



impact, transformative funding can't be unlocked. Increasing access to these resources — by simplifying the application process and providing technical assistance — could be transformative for smaller, community-led organizations. This is particularly relevant for Indigenous community organizations.

Cultural and community-specific approaches, especially for Indigenous youth, are key to effectively bridging outdoor access gaps and fostering sustainable engagement.

Consensus building and community outreach around environmental issues are key, particularly when an initiative can have an adverse impact on long-standing economic activities.

People tend to care about children more than anything else. Showing the benefit of environmental initiatives on children can help raise broad community support. It's also important to ensure young adults have a voice in shaping the initiatives designed for their benefit.

Behavioral Health and Philanthropy: Opportunities to Bring Order Out of Chaos

Audrey Gruss, founder and chairman, Hope for Depression Research Foundation

Bill Smith, founder and CEO, Inseparable

Dr. Jonathan Stevens, owner, Psych Insight, PLLC and InnerSpace, PLLC

Moderated by **Jeff Paine**, private wealth advisor, Goldman Sachs

This discussion on behavioral health addressed why the ongoing and pressing mental health crisis in America should be a focus for philanthropists.

The American mental health care system has remained largely unchanged. It's still a pyramid with outpatient care at the bottom, inpatient care at the top, and a spectrum of services in between. The prison system is currently the largest mental health care provider.

Technology has helped create new ways to enter the mental health system, but it hasn't entirely solved the confusion surrounding how individuals should access the appropriate care.



We know (the solutions) work if we do it right, but to do it right, we've got to get in the game. And that's where philanthropy has a very big role to play. We can leverage our networks. We can educate policymakers. We can build out a movement of people.

Bill Smith

Mental health as a whole is comprised of many often overlapping disorders, but they're all dealt with independently — hindering progress that could be made through a more holistic approach from a philanthropic and advocacy perspective.

Fifty percent of mental illness shows up by age 14. School-based mental health programs and early intervention are important, but children's mental health is an under-researched, under-invested area.

The intersection of policy, advocacy, and philanthropy is particularly important to mental health outcomes. Solutions exist in small scale with demonstrable impact on key metrics. Scaling those solutions will require a huge movement to create policy changes. Philanthropy can be the fuel to jumpstart that movement.

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