



FIDELITY CHARITABLE TRUSTEES' INITIATIVE

2020 Impact Report



FIDELITY CharitableSM

Make more of a difference



The Fidelity Charitable Trustees' Initiative is a direct grantmaking program, separate from the Fidelity Charitable® donor-advised fund program, whose mission is to expand charitable giving and advance the nonprofit sector.

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Catherine D'Amato
*Chair of the
Trustees' Philanthropy
Fund Committee*



Pamela Norley
President

A message from the Board of Trustees and the President

When the COVID-19 pandemic hit, Amy Sample Ward was in the final stages of planning for the 2020 Nonprofit Technology Conference. The conference, a massive gathering of more than 2,400 nonprofit professionals that Sample Ward's organization, NTEN, puts on every year, showcases how technology can help nonprofits better serve their communities. The conference was planned for the end of March, but the pandemic quickly made the gathering impossible. The event of nearly 200 nonprofit learning sessions, representing 62 percent of NTEN's budget, was suddenly canceled.

Soon after that, the conference venue was being used as a COVID-19 field hospital.

NTEN, a Fidelity Charitable Trustees' Initiative grantee, had to quickly switch from planning conference panels and networking events to helping nonprofit staff get through the sudden transition to working remotely and migrating programs and services to a digital format.

"We had so many community members saying, 'We've never had a virtual team before. What do we need to do?'"

Since the beginning of the pandemic, we've all had to shift our work to accommodate the unprecedented times we now live in. Nonprofits are no exception. Simultaneous to this adjustment to new working conditions, nonprofits saw a sharp increase in need among the communities they serve just as typical volunteering and fundraising events abruptly became unsafe.

One thing that helps make the nonprofit sector resilient to such dramatic change is solid infrastructure; technology, data, training and networks that help every nonprofit organization pivot and push forward in uncertain and frightening times. This year, the Fidelity Charitable Trustees' Initiative made 40 grants, totaling nearly \$12.7 million to support social sector infrastructure.

During the pandemic, we've all realized the importance of a strong support network; trusted friends and family who we rely on for comfort and guidance. For many people, their support network includes not only friends

"Investing in infrastructure and capacity is the only way we can build a sector that is able to navigate times like these without severe disruption."

– Amy Sample Ward
CEO of NTEN, Trustees'
Initiative grantee

Since inception, the Fidelity Charitable Trustees' Initiative has made grants totaling more than

\$47M



or family, but also the nonprofits they rely on for services. The social sector that meets these needs also needs a support network—one that prepares nonprofits to weather the storm of any disaster and continue to do their work well into the future.

"Responding to COVID has meant that our programs are more relevant than ever," said Sample Ward.

She said community members went from asking her team the "very real-time operational questions" about technology and working from home, to forward-looking questions, like "What would it mean if our program was online? What community barriers would exist?" They went from "being stuck in fear about how to survive as an organization to action mode and being able to move forward."

At the same time nonprofits were seeking ways to continue their work, donors were actively seeking advice on how to help. Infrastructure organizations also provide donors with the tools and knowledge they need to effectively support nonprofits in achieving their missions.

Our current times are turbulent and constantly changing. The ability for nonprofits to keep current and share knowledge is directly linked with how well they can serve their communities and achieve their missions. Despite this deep need, infrastructure and capacity-building projects often remain underfunded.

This is why the Fidelity Charitable Trustees' Initiative funds infrastructure and capacity-building work. A solid foundation that connects nonprofits to their donors and to each other is essential to the resiliency of the nonprofit sector so that it can be prepared for anything.

About the Fidelity Charitable Trustees' Initiative

"Infrastructure is all about how we can empower our network to unlock new ways to work together."

– Asha Curran
CEO of GivingTuesday,
Trustees' Initiative grantee

The Fidelity Charitable Trustees' Initiative (Trustees' Initiative) is a direct grantmaking program of Fidelity Charitable, separate from its donor-advised fund program. Last fiscal year, ending June 30, 2020, the Trustees' Initiative made 40 grants totaling nearly \$12.7 million to strengthen the nonprofit sector and enable organizations to better serve their communities and staff.

To realize this mission, the Trustees' Initiative provides funding for social sector infrastructure; the networks, resources, data and advocacy that nonprofits as well as donors rely on to achieve the most impact. Grants from the Trustees' Initiative focus on organizations, programs and projects that:

- Strengthen intermediaries and networks that provide information, research and advocacy needed by nonprofits to achieve their intended impact.
- Enhance individual donors' ability to make effective and informed giving decisions.

In addition to these pillars, the Trustees recognize the need to reserve flexible funding in order to react to an emergency. This year, this flexible funding was crucial to respond to critical health needs around the country and to ensure that infrastructure organizations were poised to help nonprofits respond to the challenges presented by the pandemic.

Fidelity Charitable Trustees' Initiative 2020 Impact

In the fiscal year ending June 30, 2020, the Trustees' Initiative made **40 grants** totaling nearly

\$12.7M

Since inception, the Trustees' Initiative has made grants totaling more than

\$47M

\$7.5M

Nonprofit infrastructure grants

\$3.6M

Donor education grants

\$1.65M

Special opportunities grants



Grants from the Trustees' Initiative support:



Supporting the foundation of a strong, healthy sector

The imperative to bolster the social sector has become more important than ever before; The need has never been greater, not only for nonprofits, but for the communities they serve. When COVID-19 hit, nonprofits saw a vast increase in people seeking services. At the same time, typical revenue generators like fundraising events and galas were canceled, in-person programs became unsafe and volunteer involvement plummeted. A recent Fidelity Charitable survey of more than 1,000 charitable individuals found that 47 percent planned to decrease their volunteer efforts due to the pandemic.*

How does a nonprofit adapt and continue to fulfill its mission, under those circumstances? How does an entire sector pull together to meet an unprecedented amount of need? One answer is strong infrastructure.

The term infrastructure typically conjures up the image of roads and bridges. Social sector infrastructure is not unlike those roads and bridges; they may seem like an afterthought on most days, but they are vitally important to the entire country. Access to the right technology, accurate research, best practices, and networks for collaboration may not be the first things we think of when we think of supporting nonprofits, but these shared resources are essential to helping nonprofits achieve their impact. They help nonprofits respond to adapting

environmental conditions and allow them to more effectively navigate uncertain times. Providing support in this area is a way to uplift the entire social sector in a time of crisis.

"Good works don't happen on their own," said Terry Mazany, Executive Director of the Community Foundation Opportunity Network, a Trustees' Initiative grantee. "Nonprofits need support in areas like data, research, policy, technology and trusted relationships."

Asha Curran, CEO of GivingTuesday, also a Trustees' Initiative grantee, agrees: "We're living in a world where it's going to take the work of broad, deeply connected networks to create the kind of change that we need to see... We are simply not going to get through this unless we get through it together."

* Artemis Strategy Group, an independent research firm, conducted a research study on behalf of Fidelity Charitable about the effect of COVID-19 on giving and volunteering behavior. 1,842 adults in the U.S. who donated at least \$1,000 to charity in 2019 were surveyed in March 2020.



SPOTLIGHT

Red Cross

The American Red Cross uses an innovative disaster event management system, called RC View, to prepare for, respond to and recover from disasters, including COVID-19. With RC View, the organization can rapidly access and map mission-critical information about locations affected by disaster.

With support from the Trustees' Initiative and other donors, the Red Cross is expanding the use of RC View, both internally and with disaster relief partners across the country through a Disaster Partner Hub that aims to promote greater coordination of disaster response resources.

"RC View [is] the most powerful incident management tool we have, second only to our passionate workforce," said Brad Kieserman, Vice President of Disaster Operations and Logistics in Disaster Cycle Services for the American Red Cross.

RC View uses maps and data visualization that allow Red Cross staff and partners to quickly assess and react to current needs in a disaster. The tool allowed the Red Cross to provide its workforce and partners with key situational awareness information regarding the pandemic.

Having a tool like this—one that makes collaboration and data sharing across partners easier—helps the Red Cross assist more people in a disaster situation.

"This investment helps the Red Cross disaster workforce and our partners rapidly identify and coordinate resources to meet client needs, so that hope and help can be delivered when it's needed most," said Don Herring, Chief Development Officer at the American Red Cross.



Connecting nonprofits to the networks, research and advocacy they rely on

Nonprofits rely on intermediaries and networks that provide research and tools to help them achieve the most impact. The Trustees' Initiative supports intermediary organizations that offer much-needed capacity-building services to the sector, like training, technology, research and data, and networks to learn from each other's work. When nonprofit staff are supported in these ways, nonprofits can more effectively fulfill their missions and better serve their clients.

Nonprofit support grants

Capacity-building services

Grantee	Purpose of grant
ideas42	To support the development of online toolkits to help nonprofits apply behavioral research to their work
Borealis Philanthropy	To support the Racial Equity to Accelerate Change Fund (REACH) donor collaborative focused on capacity-building to advance racial equity in the social sector
The Boston Foundation	To support its nonprofit effectiveness programs, helping nonprofits grappling with the impact of COVID-19, with an emphasis on two key areas: racial equity and strong operations
Communities Foundation of Texas	To expand its existing capacity-building efforts and create new programs designed to help the North Texas nonprofit sector move through the difficult post-COVID-19 recovery and rebuilding phases
IDEO.org	To support development of a human-centered design toolkit for nonprofits
Kansas Leadership Center, Inc.	To scale and expand its leadership development programs beyond Kansas
New Profit, Inc.	To support capacity building programs focused on system change efforts spearheaded by leaders of color
Nonprofit Technology Enterprise Network (NTEN)	To support research and capacity-building to help nonprofits with data management
Points of Light Foundation	To support the development of online on-demand educational content that will help nonprofits and companies adapt their volunteer programs during and after the pandemic
Propel Nonprofits	To coordinate with other leading nonprofit financial consultants and develop a “financial commons” that will serve as a virtual hub for financial management resources designed for small to mid-size nonprofits
SeaChange Capital Partners, Inc.	To support the National Network for Sustained Collaboration, which provides tools and capacity building support for nonprofit mergers/consolidations

Tech Impact	To provide nonprofits with strategic technology planning support and educational resources to navigate the shift to virtual operations due to COVID-19
TechSoup Global	To support TechSoup's Digital Transformation Initiative, which will provide nonprofits with the tools, training and guidance they need to shift from on-premise software to cloud-based solutions
Triangle Community Foundation (TCF)	To support TCF in strengthening the Triangle area of North Carolina's nonprofit ecosystem by making investments in individual organizations as well as in macro-level capacity building initiatives, including efforts that support LatinX nonprofits in the region

Collaboration and information-sharing

Grantee	Purpose of grant
American National Red Cross	To Support the RC View platform to help Red Cross and partners with disaster response and situation management
Beneficent Technology, Inc. (Benetech)	To support expansion of its human services referral platform, Service Net
Community Foundation Opportunity Network	To support the Community Foundation Opportunity Network in its efforts to share learnings and best practices, and to develop common strategic approaches for addressing the "opportunity gap" in communities across the United States*

Research and policy advocacy

Grantee	Purpose of grant
Independent Sector	To support general operations
National Council on Nonprofits	To support strategic planning
National Council on Nonprofits	To support general operations

* This project is fiscally sponsored by New Hampshire Charitable Foundation

**SPOTLIGHT**

Community Foundation Opportunity Network

Community foundations typically focus on meeting the particular needs of their individual regions, but when COVID-19 hit, all communities suddenly shared a common foe. The pandemic shined a light on racial and economic disparities in health outcomes, employment and education across the United States. For the past several years, the Community Foundation Opportunity Network (CFON) had already been working with community foundations from around the country on shared approaches to addressing social and economic mobility, so it was uniquely positioned to help the community foundations in its network mobilize quickly to further their work addressing the inequities made starkly apparent by the crisis.

With funds from the Fidelity Charitable Trustees' Initiative, CFON formed the Aligned Action Network, a subset of network members working together to share information and resources and committed to measuring progress toward a common set of goals around economic mobility.

"We needed to match the urgency of now," Executive Director Terry Mazany said. "We called around to community foundations and said, 'We're ready to go if you are.'"

The CFON team has been providing critical networking, learning and sharing opportunities for its members, so they can learn from what has worked for their peers and better serve their individual communities.

"As place-based organizations, community foundations have not addressed a common initiative," Mazany said, "and that's what makes this collective commitment to economic mobility so promising."

The grant is also allowing CFON's network of community foundations to learn faster, develop new approaches, prototype those ideas and scale programs that are demonstrably closing the mobility gap.



Helping donors make smarter philanthropic decisions

"The Trustees' Initiative addresses effectiveness on both sides of the giving equation; donors have the education and knowledge they need to make smart philanthropic decisions and nonprofits have the tools they need to do their best work."

– Sarah Gelfand
Vice President,
Trustees' Initiative,
Fidelity Charitable

In addition to funding nonprofit infrastructure, the Trustees' Initiative also invests in donor effectiveness. As nonprofits have struggled with the vast challenges brought on by the pandemic, donors have sought to help. When donors are well informed, they can be better, more effective givers. These grants go to nonprofits that create resources and tools for donors that help them best achieve their intended impact.

Donor support grants

Research and communications

Grantee	Purpose of grant
Giving USA Foundation, Inc.	To support the Generosity Commission's research on giving trends including exploring questions about the future of giving, volunteering and other forms of civic engagement in the United States
Indiana University Lilly Family School of Philanthropy	To support multiple initiatives, including (i) financial support for "Generosity Fellows," (ii) data collection and analyses associated with the school's Philanthropy Panel Study, and (iii) sponsorship of the Women's Philanthropy Institute Symposium
Infrastructure Research Collaborative	To support a research project to map social sector infrastructure and identify gaps and opportunities to strengthen the infrastructure for the future*
GivingTuesday	To support the GivingTuesday Data Collaborative, a platform for aggregating and reporting out on online giving donations from across different giving platforms**

Data and tools

Grantee	Purpose of grant
ideas42	To support the design and testing of new tools that help donors give more effectively
Center for Effective Philanthropy, Inc.	To support the development and dissemination of individual donor resources focused on effective philanthropy
VolunteerMatch	To support the scaling and adoption of its open network, which provides the digital infrastructure needed to mobilize and coordinate volunteers more effectively
Giving Compass	To support expansion of the content and tools available to donors via its platform*
Share Our Strength	To support Community Wealth Partners in the development of research and tools to inspire more donors to support nonprofit capacity-building

Memberships

Grantee	Purpose of grant
Social Venture Partners International	To support the leadership transition for a new leader

* This project is fiscally sponsored by New Venture Fund

** GivingTuesday was fiscally sponsored by the 92nd Street YMCA at the time of this grant



Responding to needs in real time

When the COVID-19 crisis hit, Fidelity Charitable responded with donor guidance on how to help meet immediate medical needs, how to protect vulnerable populations most impacted by the pandemic and how to sustain the nonprofit sector as a whole. Additionally, the Trustees' Initiative committed more than \$1 million to support immediate pandemic response efforts, focusing on medical needs, community safety and assistance for the charitable sector. In alignment with Fidelity Charitable's guidance to sustain all nonprofits, and recognizing the need to give differently, and more, in the face of the pandemic, the Trustees' Initiative also offered matching grants to meet emerging local needs.

Strengthening the sector's infrastructure is fundamental in times of prosperity, and especially so in times of disaster. With solid infrastructure, nonprofits can be more adaptive in the face of rapid change.

"We think the future of the sector is embracing the ability to adapt more quickly," said Dan Cardinali, CEO of Independent Sector, a Trustees' Initiative grantee.

Having solid social sector infrastructure allows nonprofits to keep providing services in the face of a disaster—it also helps prepare the sector for whatever comes next.

"COVID is the tip of the spear for the current safety net crisis," says Benetech's CEO Betsy Beaumon, "The resulting leap in unemployment is driving even greater demand for social services. In parallel, the need for effective tools to allow organizations to provide visibility and access to these services has increased as well."

Having this flexible disaster relief funding allows the Trustees' Initiative to meet emergency needs when disaster strikes, while also continuing to fund the long-term goals of increasing the capacity of the social sector and helping all nonprofits remain resilient in the face of new challenges.

Disaster response grants

COVID-19 relief

Grantee	Purpose of grant
Blue Meridian Partners, Inc.	To support the organization's COVID-19 Emergency Relief Program, which provides direct cash assistance to vulnerable individuals and families who need financial assistance immediately and cannot access public benefits quickly enough
National Foundation for the Centers for Disease Control and Prevention, Inc.	To support the Emergency Response Fund focused on immediate medical and health needs tied to COVID-19
Nonprofit Finance Fund	To support the COVID-19 Recovery Fund, which provides small grants to nonprofits to help them through the crisis
United States Fund for UNICEF	To support the COVID-19 Fast Fund for PPE

Other disaster relief

Grantee	Purpose of grant
American National Red Cross	To support Hurricane Dorian relief
California Community Foundation	To support the Wildfire Relief Fund
Community Foundation of Sonoma County	To support the Sonoma County Resilience Fund
International Medical Corps	To support Hurricane Dorian relief
Latino Community Foundation	To support the NorCal Wildfire Relief Fund
Community Foundation of Middle Tennessee	To support the Middle Tennessee Emergency Response Fund

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