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What's Next for Philanthropy in the 2020s
Flipping Orthodoxies: **Challenging Traditional Assumptions About Your Philanthropy**

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About this document

This document is a companion piece to the Monitor Institute by Deloitte's **_Seeing Philanthropy in a New Light_** report. It was created as part of the field-wide "What's Next for Philanthropy in the 2020s" initiative, supported by **Deloitte Tax LLP**, the **Robert Wood Johnson Foundation**, the **John D. and Catherine T. MacArthur Foundation**, the **W.K. Kellogg Foundation**, and the **McConnell Foundation**. The initiative engaged more than 200 philanthropy executives, professionals, donors, board members, experts, and grantees in a dialogue about the current state of philanthropic practice and where it might be headed in the coming years. To learn more about What's Next for Philanthropy in the 2020s, visit **www.futureofphilanthropy.org**.

ORGANIZATIONS ARE OFTEN held back by orthodoxies about how their work should be done.

According to our colleagues at the innovation strategy group Doblin, *orthodoxies* are deeply held beliefs about how things are done that often go unstated and unquestioned. They can be found everywhere: in the mind of an individual, in the protocols of an organization, and in the best practices of an entire industry. This conventional wisdom isn't bad—after all, it helps create standard practices that help individuals and institutions function more efficiently—but it can also lead to unproductive resistance to change ("That's not how we do things around here") and blind spots in decision-making processes.

Every organization and industry has orthodoxies. The banking industry, for example, has seen several of its fundamental orthodoxies challenged and "flipped" over the years. Banking used to be done inside a local branch with human tellers, but that "default" assumption changed with the proliferation of automatic teller machines (ATMs). And the orthodoxy of using ATMs is, in turn, being flipped today as online and mobile banking become more widespread.

The field of philanthropy has its share of orthodoxies too—some of which may be preventing funders from trying new approaches that have the potential to create even greater impact. For example, the idea that grants are a funder's most important product, that philanthropy should support only proven approaches, or that assets should be invested to maximize financial returns.

But as the world around philanthropy changes rapidly, it's important to consciously examine the orthodoxies that guide practice and determine whether these old assumptions are

still valid. That way, you can make a conscious decision about whether you ought to carry them forward or try to flip them on their heads, either partially or completely. Take, for example, a few common philanthropic orthodoxies:

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- **Failure should be avoided.** Funders often see themselves of stewards of scarce resources and look to ensure that their grants are successful in helping the communities they are serving. This isn't a bad thing, but over time, this mindset can lead to calcitrant and risk-averse organizations only funding "sure things." Some funders are deliberately carving out a portfolio of their work to fund higher-risk, higher-reward ideas that could have outsized impacts if they succeed, even if some, or most, of them fail.

- **We work in the nonprofit world.** Grantmaking to nonprofits continues to be a major part of philanthropy, but some funders are partially flipping this orthodoxy by working in a more hands-on way with businesses and local governments to deliver social services and improve communities.

- **We are permanent.** Endowed foundations were the common default for philanthropists throughout the 20th century, but a growing number of funders are looking to spend down all of their assets sooner to frontload the impact they can create.

Through interviews with nearly 200 leaders in philanthropy and dozens of interactive workshops and user feedback sessions, we identified and refined a list of more than 100 common orthodoxies in philanthropy. These orthodoxies touch on many of the deep-seated, unstated assumptions that philanthropy organizations make about how they create impact and go about doing their work.

Given the sheer size and diversity of the philanthropy space, though, different types of funders may hold very different kinds of orthodoxies. Private, family, community, and corporate foundations all operate with slightly different sets of engrained assumptions about how they do their work.

The Flipping Orthodoxies exercise is designed to help you begin to identify and flip orthodoxies that may be obstacles to innovation in your organization. Orthodoxies are, by definition, rarely questioned or challenged, which can make them hard to surface and discuss head-on. This exercise was designed as a card game to help make the process easier and more fun. It aims to help your staff, senior leadership, and/or board get clearer about deeply held assumptions that underlie your organization's work, identify those beliefs that may be holding your organization back, and provide you with a process for challenging them. We hope that it empowers you to question ways of doing things that may no longer be aligned with your organization's mission, capabilities, resources, and changing context.

Overview and objectives

This exercise is meant to help philanthropy organizations—their staff, senior leadership, and/or board—do three things:

- Build greater awareness about the assumptions underlying your organization's work

- Identify orthodoxies (unchallenged assumptions) that may be holding your organization back

- Brainstorm approaches for flipping these orthodoxies on their heads and developing new approaches rooted in new possibilities and circumstances

It has been designed as an easy-to-play game with customizable "card decks" that help prompt participants to collaborate with their peers to identify, consider, and challenge engrained assumptions about how they do their work.

Materials and setup

We recommend doing this exercise in one or more small group(s) of five or six people.

WHAT YOU'LL NEED

1. One copy of the instructions per small group (page 4)

2. One customized deck of orthodoxy cards *per small group* (see the associated card deck PDFs)

- We've developed one "starter" set of orthodoxies that should be relevant and apply to *all funders*; you'll see this as a file called the "General Philanthropy Orthodoxies." Additionally, we've created several "expansion packs" designed specifically for common orthodoxies held by private, family, community, or corporate foundations. To build a tailored deck for your organization, we recommend that funders use the General Philanthropy Orthodoxies deck *plus* whichever optional expansion pack feels most relevant to your circumstances. A community foundation, for example, would use a card deck that includes cards from both the General Philanthropy Orthodoxies deck and the Community Foundation Expansion Pack.

- To create the physical deck of orthodoxy cards itself, please print the relevant PDF files, double-sided, on heavy card stock, then cut the cards to size (eight cards to a page) to build your deck. Most copy centers or print shops can print and cut the cards for you. Make sure to print one deck for each small group.

3. A copy of the reflection questions per small group (page 7)

4. Flip charts and markers to capture key insights

5. A space where participants feel comfortable speaking up

PREWORK YOU'LL NEED TO HAVE DONE

Share the overview (pages 1–2) with participants ahead of time to establish a baseline understanding of the Flipping Orthodoxies theory and process.

The entire exercise (including the reflection questions) should take about 60–90 minutes.

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Instructions

In small groups of five to six people, take 15–20 minutes to complete steps 1 through 5 below.

1. Deal out the full deck of orthodoxy cards around your table. It doesn't matter if people have slightly different numbers of cards in their hands.

2. Quickly flip through your hand of cards, one by one. Ask yourself whether the statement on each card (e.g., "Operations need to be in-house," or "We work in the nonprofit world") really represents an orthodoxy of your organization: a deeply held, unstated, and/or unquestioned belief about the way things should be done. If you determine that the statement is an orthodoxy, set it aside in a separate pile. Repeat this for each card.

3. Take a closer look at the orthodoxies you have selected. For each orthodoxy, consider the following questions: *Does it still make sense? What would it look like if you flipped it, partially or completely? What impact would flipping this orthodoxy have on your organization or community?* Select the one orthodoxy that appeals most to you. (Note: You may, if you wish, add your own orthodoxy on a blank card.)

4. Play the orthodoxy at the center of the table; in 30 seconds or less, explain the orthodoxy to your colleagues, telling them why you chose it and what it might look like if it were flipped. Go around the whole table, with each person playing their orthodoxy.

5. Discuss the orthodoxies on the table. Choose or vote on the one orthodoxy that the table would most want to flip. Write one sentence directly on the card about why you would want to flip it. (Note: If you are conducting this exercise alongside other small groups, briefly share your one orthodoxy with the other groups in the room.)

Congratulations! You have now identified one or more orthodoxies embedded in the way your organization works that might be worth questioning or rethinking. Go on to the next section to continue reflecting on these orthodoxies and thinking of ways to flip them.
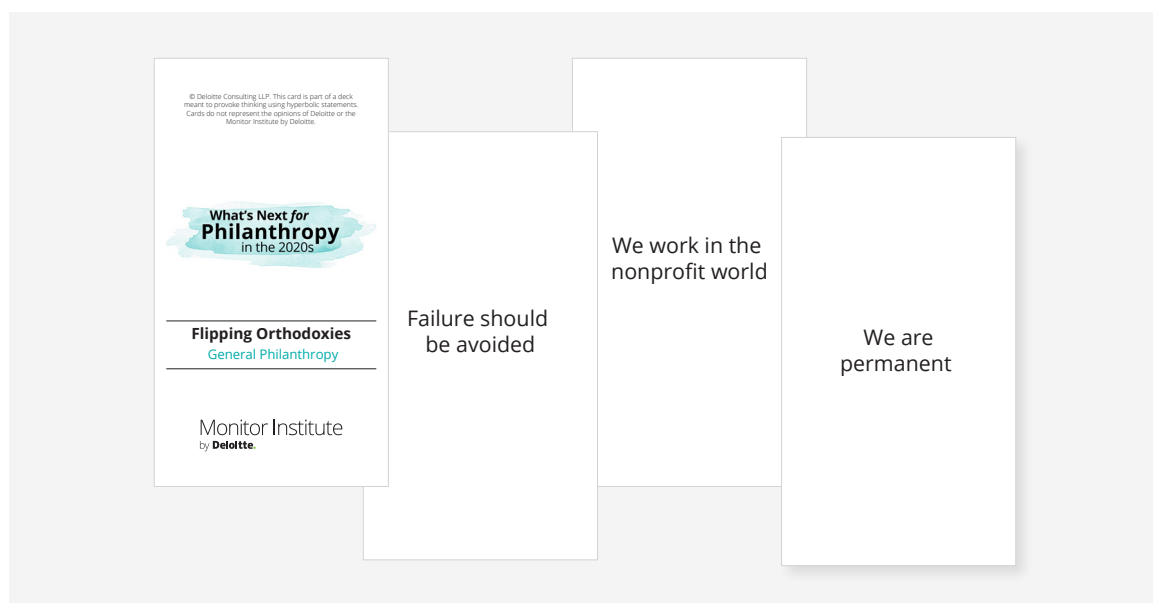
Reflection questions and next steps

These questions are meant to help you flip the orthodoxies you have prioritized for your organization. Ideally, you would flip only one orthodoxy at a time, in small groups of five or six participants. Allocate 20–30 minutes to answer these questions below as a group:

- Why does this orthodoxy exist? Does it still make sense?

If the orthodoxy should be flipped:

- Why is it hard to eradicate?
- What cases or examples (from a different organization, time, place, field, or industry) show you a different approach?
- What could you do differently to flip the orthodoxy?
- What would your organization look like if it were to flip the orthodoxy?

Once you've used this process to explore what it might mean to flip one orthodoxy, you can go back and use it on many others. Happy flipping!

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We typically use this orthodoxy card game to help an organization open its aperture and to begin to consider new ideas and new ways of working. We recommend the exercise if you are looking to identify practices that may have made sense in the past, but may not be the best path forward for the future. Importantly, you should make sure you have some way to harness the energy from board, staff, or family members who may be eager to flip some of these orthodoxies. It's a helpful thought exercise, but it's even more powerful when put into practice.

We also have other tools to help you look toward flipping orthodoxies. Many board and staff members are unfamiliar with the full range of possibilities for what a philanthropy organization can do, and this lack of awareness can itself become the source of orthodoxies. Use relevant **Edge Overviews** to learn more about what others across the field are doing. You can also review the relevant **Big Shifts** to understand the big, inescapable shifts affecting philanthropy and society to inform how old assumptions are being challenged and which orthodoxies might be ripe for flipping in the weeks, months, and years to come.

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