Q&A: *with John Matthew and Andie Sobrato*

AS TOLD TO
Leah Morrison

Separately, John Matthew and Andie Sobrato have led successful careers. He spent a decade teaching and co-founded edtech start-up Alloy Learning, and she is an entrepreneur and the owner of personal styling business Andie Sobrato LLC.

But together? Well, together, they are a philanthropic force to be reckoned with.

John Matthew is a fourth-generation member of the Sobrato family, known for its significant contributions to Silicon Valley through both business and philanthropy. He serves as the director of Impact & Learning at Sobrato Philanthropies, where he works to enhance its programs to promote equity and opportunity in the Bay Area and beyond. He and Andie collaborate to craft strategies and allocate resources to create a more equitable future. Their personal giving spans education, economic mobility, and reproductive health, all through the lens of gender and racial justice. Actively engaged with people and organizations on the ground, they are part of numerous collectives that unite philanthropists around key issues, and they aspire to lead not only for their younger family members but also for emerging young philanthropists who want to create change but need guidance on where to begin.

In an exclusive interview with *Lifestyles Magazine/Meaningful Influence*, the Sobratos discuss philanthropy and younger generations, how they use a "trust-based lens" in their giving, and the measure of their impact.

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LIFESTYLES MAGAZINE: John Matthew, what inspired you to go into education? What is it about teaching you found so rewarding?

JOHN MATTHEW SOBRATO: Part of what drove me to teaching was the positive experience I had on my educational journey. I was exposed to wonderful teachers throughout my educational experience—at St. Mary's, Bellarmine, and Santa Clara University. I had so many excellent models; compelling and humorous educators whom I wanted to emulate.

Being raised Catholic and then later educated at Jesuit institutions also had a profound impact on me. The Jesuit and Catholic philosophies taught me that it is one's duty to serve others and also to be a moral example. Additionally, my direct experiences pushed me toward the profession. I spent a good deal of my volunteer hours, especially once I got to high school, tutoring students in after-school programs. That experience of translating lessons and information for students and helping them to grasp concepts that they were struggling to take hold of in class was so fulfilling. So it was those elements in combination that made teaching a profession that really resonated for me.

What I found most rewarding about teaching is what I learned through building relationships with the students I had the privilege to teach, as well as their families. Through those interactions in the classroom, as well as coaching and supporting after-school events, they taught me to be more introspective, more empathetic, more nuanced, and more humble. My students showed me what true resilience means and how much strength it takes to keep going when the odds are stacked against you. I maintain connections with dozens of my former students, and additional college students I mentor now, because my personal investment in their journeys and futures is what stokes my inner fire to create a more equitable world.

LM: Andie, you're a successful entrepreneur. How has your experience running your own company transferred to philanthropy?

ANDIE SOBRATO: In my experience, starting a business is a lot like building a philanthropic portfolio. I approach my business as an evolving process—trying to learn as much as I can from others, testing things, and then pivoting or implementing to scale. The same can be said for philanthropy: We are always learning more about the issue area, the new players in the field, and the macro forces impacting the issue, and then changing our portfolio accordingly. If we see something is working, we double down and continue to support it.

Running a service-based business has taught me that you can't do everything at once. While I'd love to take on more clients, partner with more stores, and grow on every platform, I've learned I'm most effective, and have the greatest impact, when I focus on just a few things and do them well. The same lesson applies to philanthropy. Reproductive rights and justice connect to so many important areas—like sex education, contraception, and women's health. As much as I'd like to support them all, I've realized I can make a bigger difference by narrowing my focus.

Like running a company, I have to constantly keep track of my budget and make sure I am operating efficiently. While I am so grateful for the amount of philanthropic resources we have, they are also not endless. When you have a budget, you have to think about how to allocate that budget in a way that is fair and well thought out, and that hopefully moves the needle.

LM: How can younger generations be inspired to view wealth as a tool for impact rather than just accumulation?

AS: We believe the best way for younger generations to be inspired to become philanthropic is to experience the work up close. We're often surrounded by people with similar backgrounds and experiences, which can make it easy to lose sight of the realities the most vulnerable among us face. The only way to see different perspectives is to try to immerse yourself and learn about the struggles of others. Those experiences and interactions with those who come from different walks of life challenge our perception that we "understand what everyone goes through." We believe that makes you more empathetic, and for younger folks with access to wealth, hopefully more curious about how they can leverage their resources for others.

We also think inspiration extends from more than volunteering at a soup kitchen for a day (although, that's wonderful)! It's about learning, listening, and reflecting on how you can do more. Taking time to meet with a variety of organizations that are facing the issue you're interested in head-on is a powerful way to do that. Joining donor collaboratives is another method to dip your toes in and make your dollars go further. They also help you tap into a network and learn about organizations in the space. Meeting with other young philanthropists about their interests and their approach can also be inspiring, because you will realize that you do not have to start from scratch and there are great ideas to build your philanthropy from. And finally, just learn by doing. Six years into our joint philanthropy, we are still learning, pivoting, and meeting new organizations. So while we have a strategy, we very much embrace that philanthropy is a journey and we'd rather make a grant, have it fail, and learn from it than hoard the wealth until we've found of the perfect "silver bullet."

LM: Sobrato Philanthropies supports a range of focus areas, from education to climate. How are resources prioritized or balanced across these areas?

JMS: We have developed a theory of impact that unites our giving around four issues we believe are critical to thriving communities: economic mobility, housing security, educational equity, and climate action. And then we purpose resources at three geographic levels: regionally in Silicon Valley, across the state of California, and nationally.

Historically, the majority of Sobrato Philanthropies resources are invested at the regional level and focused on economic mobility, with a sizable portfolio of investments driving educational equity at the state level, with a special emphasis on multilingual learners. In the coming years, we will be doubling down on our home region across a broader range of issue areas while increasing our investment at the state and national level toward those same ends. The question of how to balance and prioritize how those resources are best distributed, within the context of a dynamic and ever-changing real-world environment, is an "evergreen" question. We are always assessing how to best do that, but we anchor to the perspec-

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tives of our partners and those closest to the issues we are working to make positive progress on.

LM: In what ways has Sobrato Philanthropies evolved its idea of philanthropy over the years? What about your own personal giving?

JMS: I believe one of the most important evolutions of Sobrato Philanthropies over the years has been our increasing willingness to partner with grantees and listen to them not only as a funder but also as a family. Over decades of philanthropic work, Sobrato Philanthropies and the family have come to understand that, while well intentioned, we aren't always the smartest people in the room. We can have more impact when we partner with local nonprofits and residents in a community, to work together to operationalize their ideas for an improved future. To put their voices and perspectives at the center of our approach to philanthropic investment. This has led us to implement ways we can reduce burdens for our nonprofit partners, experiment with participatory approaches, and test ways to share power and decision-making with folks beyond the foundation.

AS: For our personal giving, the biggest evolution in recent years has been bringing more strategy and discipline to the way that we invest our philanthropic dollars. We now have a clarified perspective on what lies at the heart of our investments—creating a more just world by driving racial and gender equity—and are more thoughtful about how each investment in our portfolio drives toward that.

We also now put a more focused effort into creating a balanced portfolio of investments. We want to ensure that we are addressing both symptoms and root causes, and balancing grants to organizations that provide direct support as well as those that address systemic change. We want to distribute our grants to different types of organizations and try to balance between long-standing institutional nonprofits and grassroots organizations. We see investments in grassroots leaders as really important for the health of the nonprofit ecosystem. Sharpening the "why" behind our personal giving as well as how to balance a range of investments to maximize learning and impact have been important ways in which we have deepened our philanthropic approach.

LM: Why is giving in your focus areas the best way to create positive social change? What initially drew you to those areas?

JMS: Andie and I were both born and raised Catholic and our faith is at the center of our work. Coming from a Jesuit institution, we were also always taught that fighting for social justice is an important tenet of practicing our faith.

We often have reflected on this question: *How do we contribute to advancing social justice within our community?* Our answer to that is to focus on those who have often been excluded from opportunity throughout American history and up to the present day: women, people of color, and people who are lower income. We believe that a focus on those broad

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groups of people makes the biggest contribution toward justice during our lifetimes, because when you extend opportunity to those most excluded, you make progress that benefits everyone. We believe that deciding "who" you will prioritize with your philanthropy and "why" are the first questions you answer to inform your areas of philanthropic focus.

Our conviction is that you solve for injustice by providing equal opportunity, but there are many ways a philanthropist can choose to impact that. For me and Andie, our focus areas are the specific ways that we invest philanthropically to impact people's ability to have opportunity and freedom of choice. People need opportunities at all levels—and we know that access to education, allowing women to have bodily autonomy, driving civic engagement in communities, and enabling economic advancement—are key levers to pull to minimize disparities in opportunity that are presently entrenched. And we know that by prioritizing women, people of color, and lower-income folks enhances our potential for impact through those focus areas.

LM: When it comes to your giving, you've said that a "trust-based lens" is important to you. Can you explain what that means?

AS: We think those closest to the problem are the best equipped to solve it. We have seen a lot of philanthropists tie their dollars to the execution of specific programs or hold dollars hostage until nonprofits execute the way they (as funders) want them to. In working so closely with organizations, we see how overwhelmed and underresourced they are—while trying to solve really large, systemic problems.

The reality is, they are working with communities every day and as philanthropists, we see them as the subject matter experts, not us. I would never tell an accountant how to do their job because I am not an accountant. In the same way, I'm not going to tell an ED who lives and breathes this work every day how to implement their services. This is why most of our gifts in recent years have gone to general operating budgets—we learned and we listened and we know in order for organizations to be successful, they need dollars to help run their everyday operations.

At the same time, trust-based does not imply a lack of accountability. We and our grantees are mutually accountable to stay in relationship with one another and be transparent. To share our views on where we see progress being made as well as where we see challenges. And over time, you assess that relationship, and you are each transparent about what is needed for it to continue. This is what trust-based philanthropy looks like to us.

LM: How do you measure the impact of your philanthropic efforts?

AS: Since one of us measures the impact of their family's philanthropy as a full-time job, we can say that it requires a ton of effort (and a team) to measure it across a portfolio of grants in a deep way! The things you are often

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trying to change through philanthropy are entrenched problems, you are often giving to issues that we have never been able to make adequate progress on as a society, and an individual donor needs to set their expectations accordingly. There won't be an easy metric, developed benchmark, or index available to measure success against.

JMS: An individual philanthropist can assess impact in meaningful ways. If you are providing general operating support, as Andie and I often do, we think about what that organization accomplishes annually in the world.

We review impact reports these organizations provide and meet with them to understand whether the results they are driving, the ways they are directly changing lives, the ways they are empowering people, or the ways they are shifting systems resonate for us. We often can review their financials and assess their organizational sustainability. Even for early-stage and grassroots organizations, we can look at their strategic plans or major initiatives and assess their ability to hit key milestones. For organizations that struggle or even fail across some of those dimensions, we assess their ability to adapt and pivot strategically. So individual philanthropists have several options with which to assess impact, even when providing general operating support in a trust-based way.

LM: What does the word *legacy* mean to you personally?

JMS: In our mind, a legacy is living a life worthy of being remembered after we pass from this earth. Personally, Andie and I aspire for our legacy to be one characterized by generosity, humility, and courage. That we lived a life focused on helping others. **LM**

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