Victory

Humboldt
Industrial
Area

Shingle
Creek

DOWLING AVENUE

Webber-Camden

Lind-Bohanon

Camden Industrial

northside
funders group

RACIAL EQUITY
TOOLKIT

Changing the Way Philanthopy Works

Greetings, Colleagues.

The Northside Funders Group (NFG) is a collaborative of private, public, and corporate funders who are aligning investments and strategies to catalyze comprehensive, sustainable change in North Minneapolis by changing the way that philanthropy works. We do this by first acknowledging the role that philanthropy has played in maintaining decades of inequities, despite strong investments, and then by working proactively to Learn, Leverage, Influence and Invest in new, intentional, and intersectional ways, individually and collectively. Each year, NFG members invest $12 to $17 million in nearly 200 organizations serving North Minneapolis.

Despite this significant financial support, unaligned efforts don't always translate into a better quality of life for our residents. NFG was formed to help its member funders align efforts, develop new solutions to Northside needs, and explore a cooperative philanthropic approach to investing in solutions that produce results. NFG coordinates investments in three primary focus areas: economic development, education, and social capital.

Decades of racially discriminatory policies and disinvestment in North Minneapolis have led to some of the nation's largest racial inequities – in education, employment, wealth, incarceration, and more. Given this context, NFG members were eager to learn and adopt best practices in philanthropy to increase racial equity and realize our shared vision, values, and agenda.

As a result, we designed this Racial Equity toolkit which helps members:

1. **COMMIT:** Understand what racial equity means and the actions that sustain it;

2. **BE ACCOUNTABLE:** Analyze and mitigate power dynamics in philanthropy and promote accountability to the community; and

3. **ACT:** Adopt effective practices for transforming foundations into true racial equity champions.

The toolkit is built on a framework that addresses each of the three steps above to help foundations intentionally move along the continuum towards racial equity. NFG advances strategies and coordinates investments that lead to stronger learning opportunities for children, better opportunities for adults to earn living wages, economically thriving neighborhoods and a stronger network of cross-sector leaders who are better equipped to work in partnership with the community to build achieve a thriving North Minneapolis, and thereby, a thriving Twin Cities region.

Yours in the Journey,

Tawanna

Tawanna A. Black
Executive Director Northside Funders Group

TALKING ABOUT RACE ISN'T EASY.

HERE ARE SOME TIPS FOR PRODUCTIVE CONVERSATIONS AS YOU USE THE TOOLKIT:

- Expect discomfort – even confrontation – with yourself and others.

- Be thoughtful about impact vs. intent. Assume positive intent but acknowledge and hold yourself and others accountable for the impact of actions.

- Try not to react defensively, listen to, and acknowledge other people's experiences.

- Not everyone processes information or engages in the same way – respect that some people may need time to reflect before responding.

Racial Equity Toolkit

Introduction

- Bridge of Tension
- Why Racial Equity? Triple Bottom Line
- Spheres of Influence
- Baseline Assessment
- Continuum from Race Neutral to Structural Racialization
- Our Framework

Our Framework

1. COMMITMENT to Racial Equity through increased KNOWLEDGE
2. ACCOUNTABILITY through increased and improved community ENGAGEMENT
3. ACTION through adoption of best PRACTICES
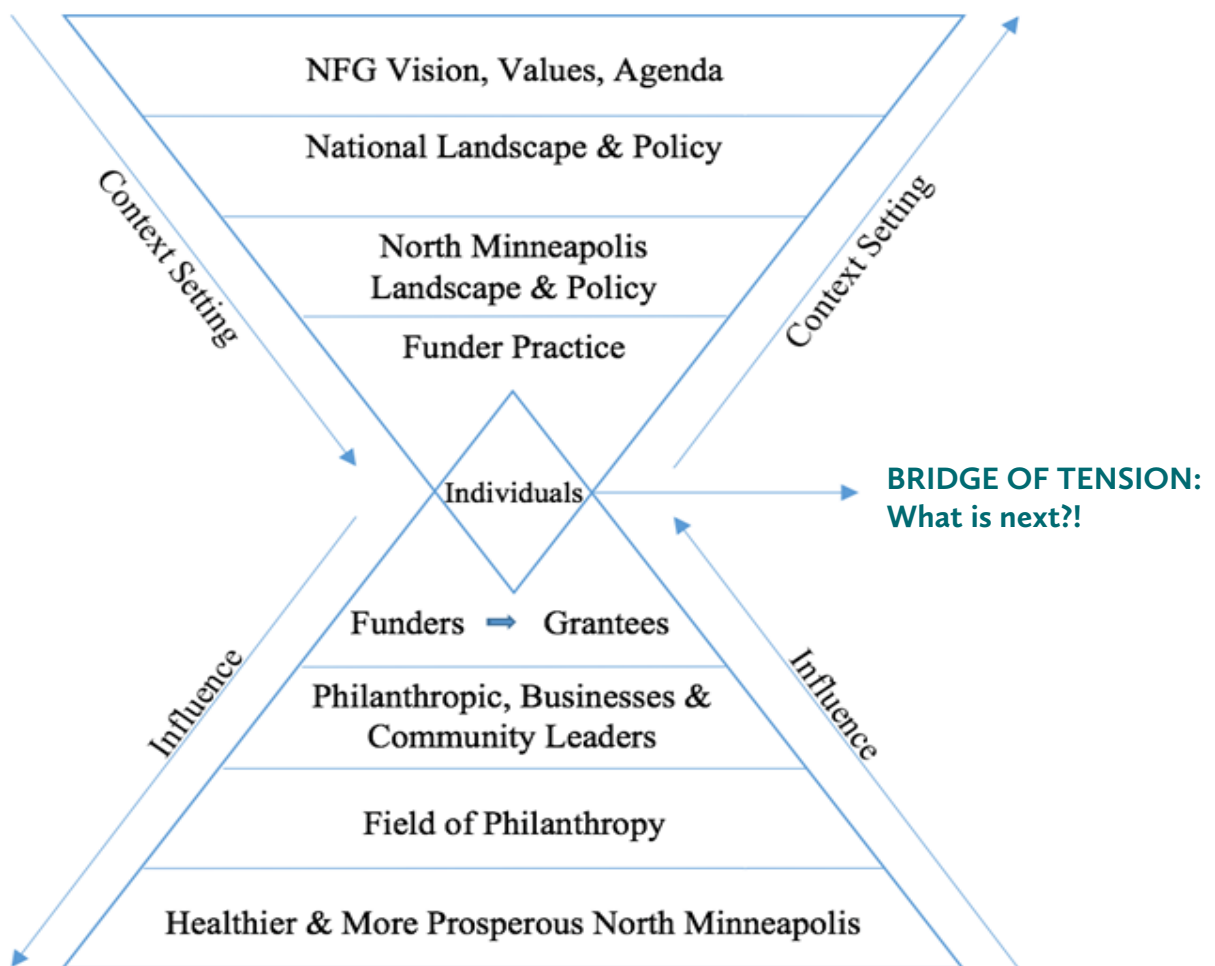
Northside Funders Group

- How do we embed racial equity into our 4 levers: Learn, Leverage, Influence, Invest?
- How do we lead and facilitate the journey of racial equity work for our members?

Northside Funders Group Approach

Learning and understanding the implications that national and local history has had for North Minneapolis, how funders' practices contributed, and the alignment of NFG's work with changing the effects of these implications.

Using the toolkit as a resource, individuals use their positions to influence the policies and practices in their institutions, and to later influence change in other entities.

CHANGING THE WAY PHILANTHROPY WORKS IN NORTH MINNEAPOLIS

Context Setting

NFG Vision, Values, Agenda

National Landscape & Policy

North Minneapolis Landscape & Policy

Funder Practice

Individuals

BRIDGE OF TENSION: What is next?!

Influence

Funders ⇒ Grantees

Philanthropic, Businesses & Community Leaders

Field of Philanthropy

Healthier & More Prosperous North Minneapolis

Racial Equity is "Mission Relevant" the Triple Bottom Line

Accelerated Community Impact

- The right thing to do
- Minneapolis leads the nation in racial inequities
- Recent events underscore the urgency
- We need transformation, not incremental progress
- We must close the belief gap: equity is possible

Greater Return on Investments (ROI)

- The smart thing to do
- A new model is needed – that's why NFG exists
- The impact of limited charitable dollars is increased through collective giving
- More informed, strategic decisions
- Responsive to authentic community needs and goals
- All decision-making is oriented to community benefit

Improved Internal & External Relations

- Grantees will see foundations walking their talk of racial equity
- Foundations can fully leverage the talent of staff of color
- More trusted and helpful partner to grantees
- More effective and developed staff

The Continuum

Racial Disparities →

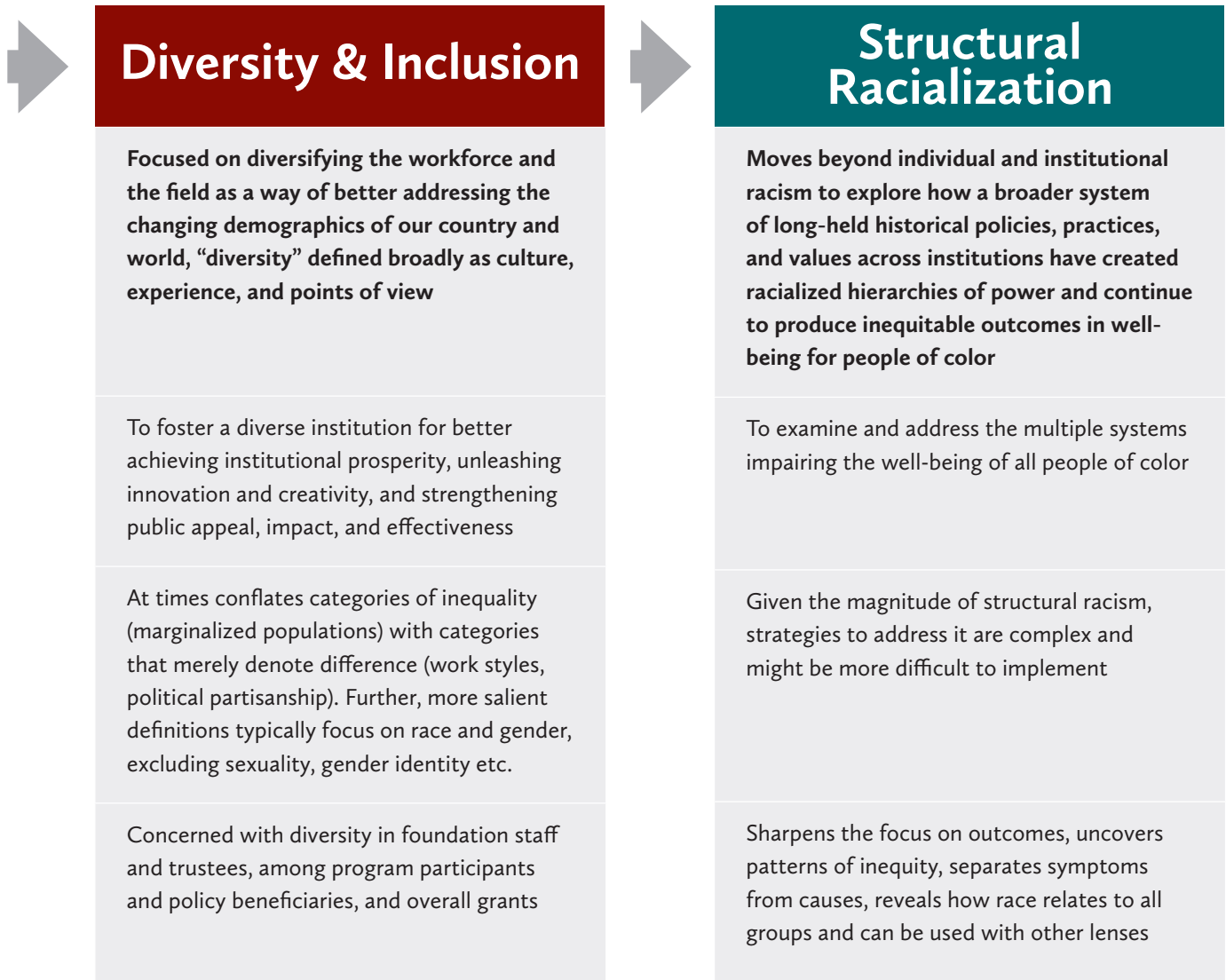| Race Neutral	Race Conscious
Omits race for consideration in policies and programs – instead references alternatives that focus on individual characteristics or socioeconomic status	**Argues for race/ethnicity as a variable in public policy and program design, notably in understanding how outcomes are racialized**
To achieve mission and goals without naming race explicitly in problems and solutions	To ensure policies, programs, and practices account for how racial inequities shape outcomes of well-being
Ignores the persistence of racial disparities in outcomes of well being , the manifestations of racism in opportunity domains and vast research showing how policy benefits and program services are not received equitably by communities of color	Some race-conscious proposals rely on racialized stereotypes; play down or dismiss the intersection of race, class, gender, sexuality and others; and may not be rooted in solutions that examine the root causes of racial inequalities
Race and ethnicity are neither examined nor addressed in foundation's internal operations or grantmaking	Grants and grant strategies address how race and ethnicity shape experiences with power and access to opportunity

The Continuum

Racial Equity →

Diversity & Inclusion	Structural Racialization
Focused on diversifying the workforce and the field as a way of better addressing the changing demographics of our country and world, "diversity" defined broadly as culture, experience, and points of view	**Moves beyond individual and institutional racism to explore how a broader system of long-held historical policies, practices, and values across institutions have created racialized hierarchies of power and continue to produce inequitable outcomes in well-being for people of color**
To foster a diverse institution for better achieving institutional prosperity, unleashing innovation and creativity, and strengthening public appeal, impact, and effectiveness	To examine and address the multiple systems impairing the well-being of all people of color
At times conflates categories of inequality (marginalized populations) with categories that merely denote difference (work styles, political partisanship). Further, more salient definitions typically focus on race and gender, excluding sexuality, gender identity etc.	Given the magnitude of structural racism, strategies to address it are complex and might be more difficult to implement
Concerned with diversity in foundation staff and trustees, among program participants and policy beneficiaries, and overall grants	Sharpens the focus on outcomes, uncovers patterns of inequity, separates symptoms from causes, reveals how race relates to all groups and can be used with other lenses

Advancing Racial Equity in All of Our Roles

INDIVIDUAL

- Philanthropist
- Colleague
- Manager
- Civic Leader
- Voter
- Neighbor
- Volunteer
- _____

INSTITUTIONAL

- Employer
- Grantmaker
- Convener
- Purchaser
- Investor
- Advocate
- _____

COLLECTIVE

- Northside Funders Group
- Chambers
- Associations
- Policy & Issue Working Groups
- _____

Baseline Assessment

In each of these roles, how often do you:

	Rarely	Sometimes	Often
INDIVIDUAL			
Talk about racial equity?	☐	☐	☐
Factor racial equity into your actions?	☐	☐	☐
INSTITUTIONAL			
Talk about racial equity?	☐	☐	☐
Factor racial equity into your actions?	☐	☐	☐
COLLECTIVE			
Talk about racial equity?	☐	☐	☐
Factor racial equity into your actions?	☐	☐	☐

Do you notice any gaps between words and action? ☐ Yes ☐ No

Do you notice any gaps between your personal and professional roles? ☐ Yes ☐ No

What factors might contribute to these gaps?

_____

_____

_____

Our Framework

1.
Commitment

emerging

Passive, uneven, no common understanding

active

Community ownership, transparency

growing

Begins redefining relationships & success

3.
Action

emerging

Doesn't address structural racism

growing

**Interested,
common language,
analysis &
understanding**

active

Motivated, informed

emerging

**Unclear regarding needs
& goals**

**2.
Accountability**

growing

**Adopts strategies
to address structural
racism**

active

**Consistent use
of racial
equity tools**

Session 1 Commitment

We need a common
base of **Knowledge** to
ground our understanding of
racial equity
in order to achieve it.

TABLE OF CONTENTS

Reflection: Have You Had These Advantages?

☐ My parents and grandparents were able to purchase or rent housing in any neighborhood they could afford.

☐ I can take a job with an employer who believes in affirmative action without having coworkers suspect that I got it because of my race.

☐ I grew up in a house that was owned by my parents.

☐ In mainstream media I can see people who look like me represented fairly and in a wide range of roles.

☐ I live in a safe neighborhood with good schools.

☐ I can go shopping most of the time, pretty well assured that I will not be followed or harassed.

☐ If my car breaks down on a deserted stretch of road, I can trust that the law enforcement officer who shows up will be helpful.

☐ I don't have to worry about helping my parents out when they retire.

☐ I never think twice about calling the police when trouble occurs.

☐ Schools in my community teach about my race and heritage and present it in positive ways.

☐ I can be pretty sure that if I go into a business and ask to speak to the person in charge that I will be facing a person of my race.

TOTAL_____

DISCUSSION QUESTIONS

What effects do these advantages have on an individual?

_____

On a community?

_____

Which, if any, are impacted or mitigated by your foundation's efforts?

_____

Reflection

A Note about White Privilege

"If you're carrying guilt for being privileged, quit wasting your time....Focus less on your guilt and more on being a catalyst for change." - Sincere Kirabo

This exercise exposes the racism embedded into aspects of daily life that lead to what's called "unearned white privilege" – hidden advantages whites enjoy with enormous cumulative effects that perpetuate a legacy of inequities. There are other privileges that this quiz may or not address, such as gender identity, religion, sexual orientation, immigration, poverty and more, which work together with race intersectionally.

Recognizing privilege is a worthwhile step but on its own it doesn't produce any benefits. *Leveraging* that privilege to dismantle the systems that perpetuate these inequities is what counts.

How can you use your privileges to do so – individually, as a foundation representative, and as the member of a collective? This toolkit is designed to help you identify ways to do just that.

# We Won't Achieve Racial Equity without Talking about Racism

Aligning Expectations

Dr. Martin Luther King, Jr. from Chaos or Community?
Equality means equality – not improvement

There is not even a common language when the term "equality" is used. Negro and white have a fundamentally different definition. Negroes have proceeded from a premise that equality means what it says, and have taken white Americans at their word when they talked of it as an objective. But most whites in America in 1967, including many persons of goodwill, proceed from a premise that equality is a loose expression for improvement. White America is not even psychologically organized to close the gap—essentially it seeks only to make it less painful and less obvious but in most respects to retain it. Most of the abrasions between Negroes and white liberals arise from this fact.

Equity doesn't mean sameness – it means fairness
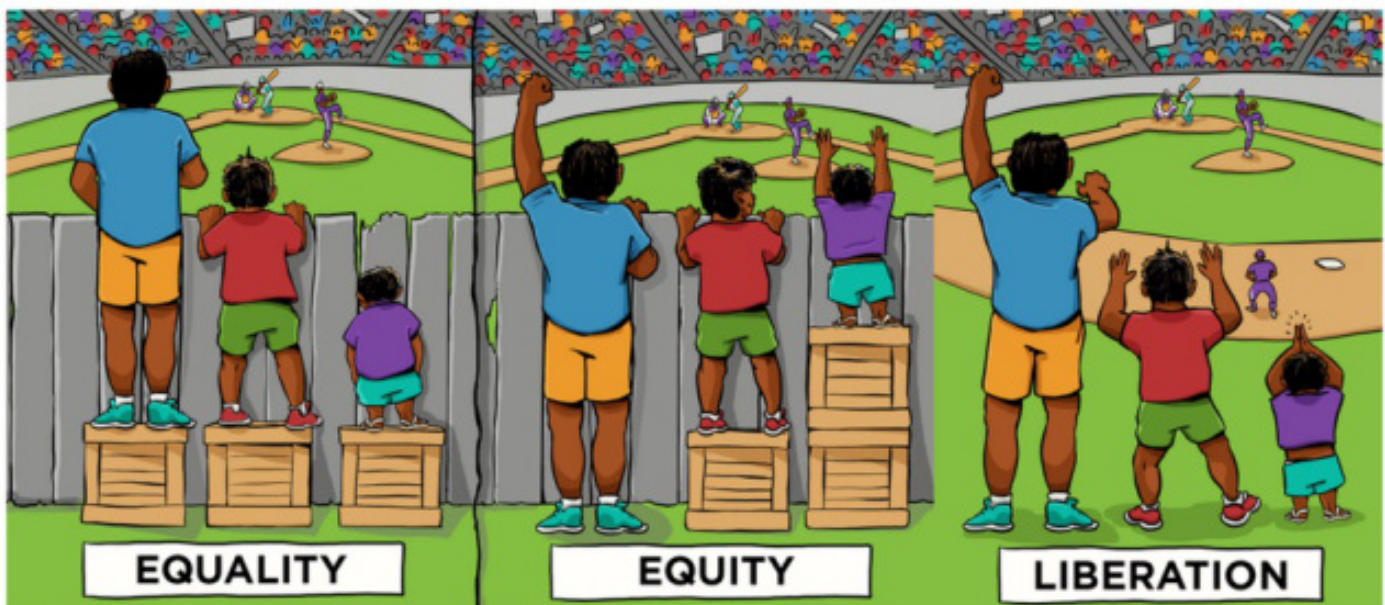
Terms

Race: A social construct that artificially divides people into distinct groups based on characteristics such as physical appearance (particularly of color), ancestral heritage, cultural affiliation, cultural history, ethnic classification, and social, economic and political needs. Racial categories may contain ethnic groups.

Racism: A system of structuring opportunities and assigning values based on social interpretation of our race.

Microaggressions: the everyday verbal, nonverbal, and environmental slights, snubs, or insults, whether intentional or unintentional, which communicate hostile, derogatory, or negative messages to target persons based solely upon their marginalized group membership.

Intersectionality is the overlapping or intersecting social identities and related systems of oppression, domination, or discrimination (*e.g.,* women of color), coined by Dr. Kimberle Crenshaw.

Individual Racism: Pre-judgment, bias, or discrimination towards an individual based on race.

Institutional Racism: Refers to discriminatory treatment; unfair policies, practices and patterns; and inequitable opportunities and impacts in single public- and private-sector entities.

Structural Racism: A system on which policies, institutional practices, cultural representations, and other norms work in various, often reinforcing ways to perpetuate racial group inequity. It identifies dimensions of our history and culture that have allowed privileges associated with "whiteness" and disadvantages associated with "color" to endure and adapt over time.

Structural Racialization: A set of processes that may generate disparities or depress life outcomes without any racist actors. *It is a web without a spider.* - jon powell

Internalized Racism: Acceptance by the stigmatized race of negative messages about our abilities and intrinsic worth. - Dr. Camara Jones, CDC

Reverse Racism doesn't exist. People of color can be prejudiced but not racist because they don't benefit from a system of oppression based on race.

Racial Equity Lens brings into focus the ways in which race and ethnicity shape experiences with power, access to opportunity, treatment, and outcomes, both today and historically. It helps grantmakers think about what can be done to eliminate the resulting inequities ... both internally and within their fields or communities.

Targeted Universalism supports needs of particular while reminding us we are all part of the same social fabric... It recognizes racial disparities, while acknowledging their presence within a larger inequitable, institutional framework.

White Supremacy: an historically-based, institutionally-perpetuated system of exploitation and oppression of continents, nations, and people of color by white peoples and nations of the European continent, for the purpose of maintaining and defending a system of wealth, power, and privilege.

Why Talk about White Supremacy vs. Racism?

- The purpose of racism is much clearer when we call it white supremacy. The word supremacy means a power relationship exists.

- Race is an unscientific term for differences between people. Although racism is a social reality, it has no biological or other scientific basis.

- The term racism often leads to dead-end debates about whether a particular remark or action by an individual person was really racist or not. We will achieve a clearer understanding of racism if we analyze how a certain action relates to the system of white supremacy.
- Elizabeth "Betita" Martinez

Talking about Racism: Impact vs. Intent

"When somebody picks my pocket, I'm not going to be chasing him down so I can figure out whether he feels like he's a thief deep down in his heart. I'm going to be chasing him down so I can get my wallet back. I don't care what he is, but I need to hold him accountable for what he did. And that's how we need to approach to conversation about race."

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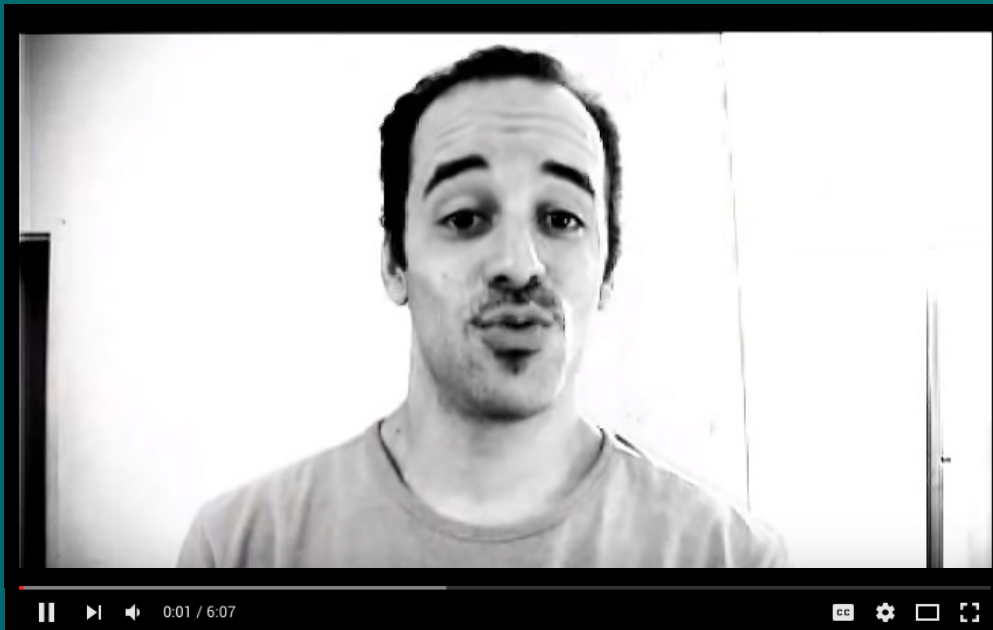
Jay Smooth, RaceForward & Ill Doctrine

Avoiding vs. Fighting Racism

ACTIVE RACIST BEHAVIOR
is equivalent to walking fast on a conveyor belt. The person engaged in active racist behavior has identified with the ideology of White supremacy and is moving with it.

PASSIVE RACIST BEHAVIOR
is equivalent to standing still on this conveyor belt. No overt effort is being made, but the conveyor belt moves the bystander along the same direction as those who are actively walking. Some of the bystanders may feel the motion of the conveyor belt, see the active racists ahead of them, and chose to run around, unwilling to go to the same destination as the White supremacists.

However unless they demonstrate **ACTIVELY ANTI-RACIST BEHAVIOR** – walking actively in the opposite direction at a speed faster than the conveyor belt— they will find themselves carried along with the others.

Reflective Questions

How does this play out in our community? Identify a recent state or national event – positive or negative.

- **Were people of one race or ethnicity more likely to be impacted than others? Why and how so? How did intersectional identities fit in?**

- **Do your relationships influence your interpretation of these events and your views on what an appropriate response would be?**

- **What role did you play in response: Passive Racist or Actively Anti-Racist behavior?**

- **How could you change this? As an individual? As a member of a foundation?**

- **Did news coverage identify the structural and systemic causes for this event? Did policymakers?**

- **What's one action you could take to reduce the chances it will happen again?**

_____

_____

_____

_____

Historical Trauma

Experiences like genocide, slavery, forced relocation, destruction of cultural practices, and separation of families can result in cumulative emotional and psychological wounds that are carried across generations.

"These events don't just target an individual, they target a whole collective community...the trauma is held personally, and can be transmitted over generations. Even family members who do not have a direct experience of the trauma itself can feel the effects generations later."— Karina Walters, Ph.D.

As foundations, we need to examine how our grantmaking accounts for generational trauma and impact.

"There are two ways to conquer a nation: you kill the people, or you take away everything that defines who and what they are." - filmmaker Georgina Lightning

Thousands of Native children were forcibly taken from their homes and put into boarding schools by the government from that late 1800s into the 20th century. The stories of abuse are well known. Some children died in the schools. Many others were emotionally scarred for life.

For example, an American Indian boarding school was located on the University of Minnesota Morris campus and operated in terms by the government and the Catholic Church from 1887 to 1909. "Children as young as kindergarten age attended the Morris school. The children were allowed to speak only English. They were required to dress and style their hair like Euro-Americans. Sometimes they were not allowed to return home over the summer, in part to keep them from being overly-influenced by their own cultures." - Morris Human Rights Commission

"A lot of the elders don't want to talk about what went on in boarding school," Lightning says. "And then there are others that are totally open and willing to share everything. It was pretty messed up. And the way it's just affected the generations; it was really poisoning in a lot of way."

ent Boarding School at White Earth, Minn.

Internalized Racism

An update of Dr. Kenneth and Mamie Clark's 1940's doll experiment - their research had an impact on the Brown vs. Board of Education ruling

Individual racism feeds systemic racism

When the same action produces different results, it illustrates one way that racial disparities are created within the criminal justice system.

Cultural Assets

As foundations, we need to check our lens: we must acknowledge the impact of systemic and interpersonal racism on the *conditions* of a community, not the community itself. We need to dismantle, rectify, and make up for systems of oppression that create intolerable and unjust conditions, while investing in means of self-determination and community-led efforts that build on cultural and community strengths, and make evident our trust that communities know best what they need.

The Power of Representative Leadership
And value of culturally affirming institutions

Minnesota Teacher Of The Year Loved By His Students
2 minutes left

0:01 / 6:07

White teachers are less likely to see black students as gifted compared to white students with the same scores. Black teachers identify white and black children as gifted at equal rates based on equal scores.

Cultural Preservation

why our language and religion
are of extreme importance.

0:01 / 6:07

"Ojibwe language captures the way that Ojibwe people see the world."

Discussion Questions

- **Was any of the information presented in this section new to me?**

- **Does my foundation regularly talk about racism? Do they use some of these terms and tools?**

- **What made me feel most uncomfortable? What gave me confidence? Why?**

- **As a funder, have we acknowledged and spent time understanding the impact of historical trauma in our community?**

- **Have we spent time learning how white supremacy, internalized racism, microagressions, intersectionality, and institutional racism impact our community at large and individuals and families?**

- **How much time have we spent as a foundation learning more about the history and culture of communities of color we serve?**

- **Does our foundation have a strengths-based or deficit-based approach to communities of color based on our grantmaking, operations, staffing, communications, relationships, etc.?**

- **Where is my foundation currently along the conveyor belt (see page 20)?**

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

How Systemic Racism Plays Out

Disparate Impact

RACIAL INEQUALITY

Overt Discrimination

COMMITMENT

Example of Disparate Impact

GOOD INTENTIONS

Ramsey County paid vendors alphabetically, which they believed was equitable.

Checks were run on Fridays for vendors whose names fell at the beginning of the alphabet. The remaining contractors were paid on Monday.

DISPARATE IMPACT

Due to the prevalence of last names beginning with X and V, Hmong contractors were disproportionately represented in the group paid later.

Although the County didn't INTEND to create longer wait times for Hmong vendors, the resulting IMPACT of this policy on Hmong contractors was disparate.

Overt, Systemic Racial Discrimination

Spotlight on Housing

Redlining & the Government's Role

The Federal Housing Administration (FHA) was established by Congress in 1934 and insured private mortgages, which lowered interest rates and reduced down payments.

The FHA adopted maps that rated neighborhoods. Neighborhoods with all white and U.S. born residents were rated "A" and colored green – these were considered excellent prospects for insurance. Neighborhoods with any black residents or immigrants were rated "D" and colored red – usually considered ineligible for FHA insurance. Because insurance was required for a mortgage, blacks were essentially locked out of home ownership. This practice was used across the country.

The G.I. Bill: Serviceman's Readjustment Act of 1944 offered low-cost mortgages, low-interest business loans, cash for tuition and living expenses for education. Fewer than 100 of the first 67,000 mortgages insured by the G.I. Bill were taken out by people of color.

From 1934 to 1962, the federal government backed $120 billion in home loans. More than 98% went to whites. 100 of the 350,000 new homes built with federal support in northern California between 1946 and 1960 went to African-Americans.

Legacy of Redlining
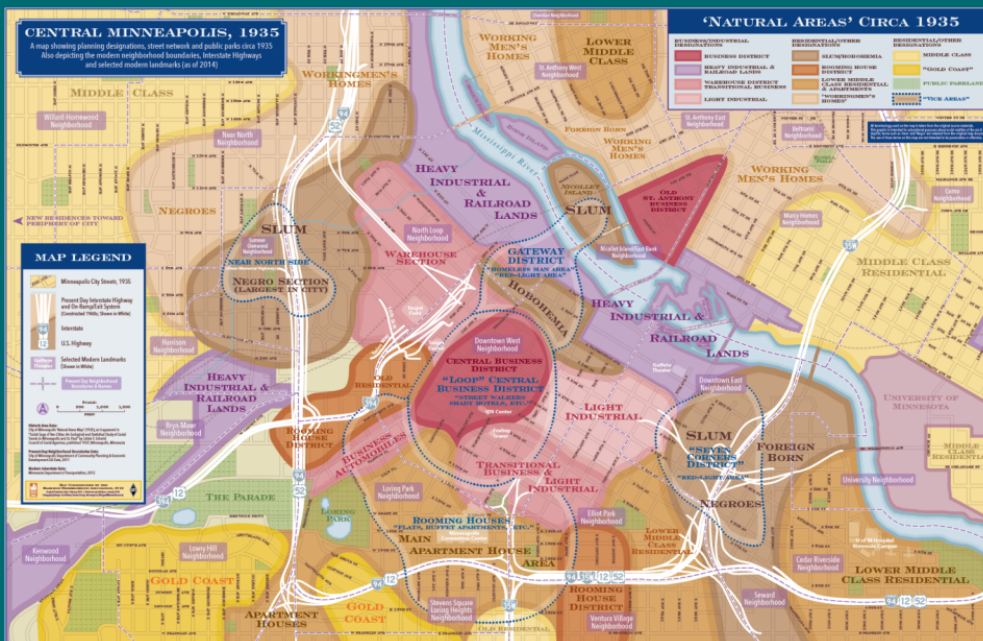
- **Redlining took place from the 1930's – 1970's**
- **Communities of color were divided and isolated as the result of policy decisions made when the federal highway system was built**
- **Redline communities declined socially and economically**
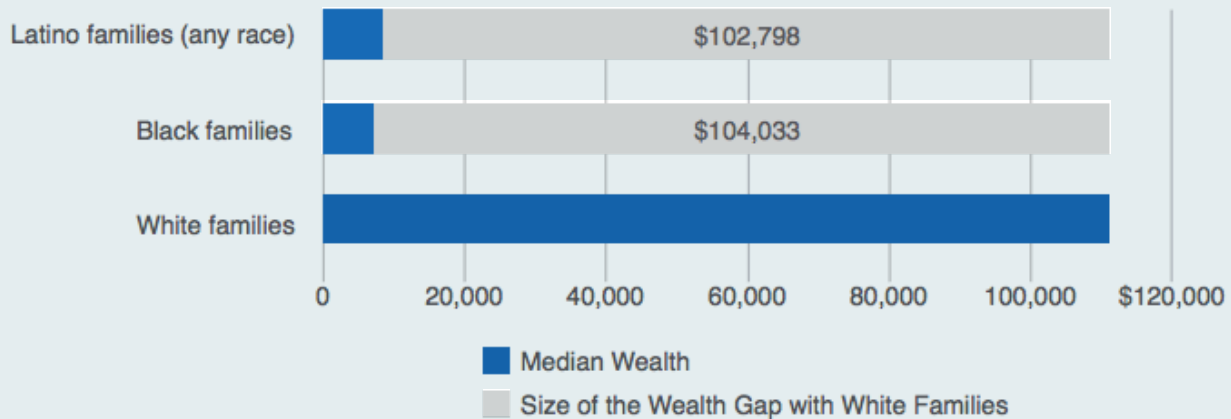- **Redlined communities match areas with high infant mortality rates today**

Intergenerational Impact

	WHITE	BLACK
World War II Veteran	Low-income High school diploma City resident ▼ Able to use low-interest FHA and VA mortgage provisions of GI Bill Moved family from public housing to segregated suburban home ownership	Low-income High school diploma City resident ▼ Couldn't access home loan under GI Bill because of racially-restrictive underwriting criteria Family remained in rental housing in the city
Children	Children attend well-resourced suburban schools Family borrowed from home equity to finance child's college education – first in family to go to college ▼ Secures professional job Buys own house Inherits appreciated family home when father dies	Family could not afford to send child to college Children's high school education is from under-resourced schools ▼ Gets minimum wage jobs Continues to live in family home Considers joining the army Have to borrow money when father dies to give him a decent funeral
Grandchildren	Live in well-resourced communities Have funds for college They have a trust fund	Live in disinvested communities Complete college on work student and graduate in debt

This gap is the predictable result of generations of intentionally discriminatory policies.

Figure 1. Wealth Accumulation and Size of the Racial Wealth Gap, 2011

Latino families (any race)	$102,798
Black families	$104,033
White families	

Legend:
- Median Wealth
- Size of the Wealth Gap with White Families

Source: Survey of Income and Program Participation (SIPP), 2008 Panel Wave 10, 2011

Redlining Today

THE LEGACY
Redlining's Impact Is Cumulative

Historic redlining keeps homeownership out of reach for many families of color today.

Someone whose family was denied a mortgage 20, 50, or even 80 years ago may not have family wealth to use for a down payment today as a result.

CURRENT PRACTICE
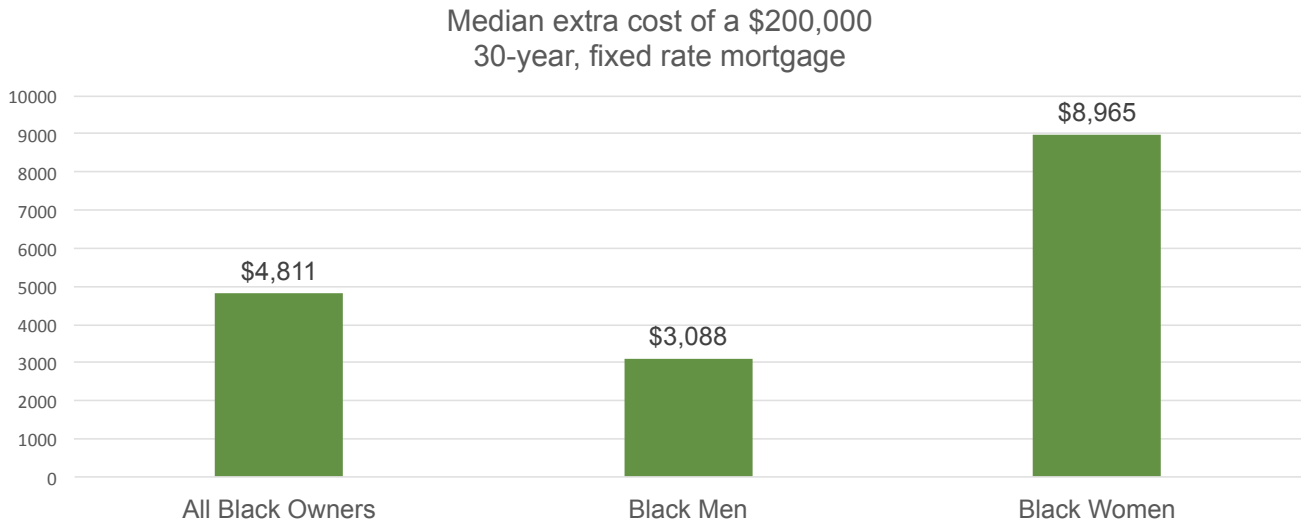### Though Illegal, Redlining Continues

Blacks and Latinos are more likely to be denied loans than whites with equivalent income and credit histories.

When approved, they're more likely to be steered towards subprime loans and charged higher interest rates.

Associated Bank settled one of the largest redlining complaints ever brought by the federal government for denying loans to qualified Black and Latino applicants in Minnesota in 2008-10.

Black families pay more due to lending discrimination...

Median extra cost of a $200,000 30-year, fixed rate mortgage

Bar chart showing: All Black Owners $4,811; Black Men $3,088; Black Women $8,965
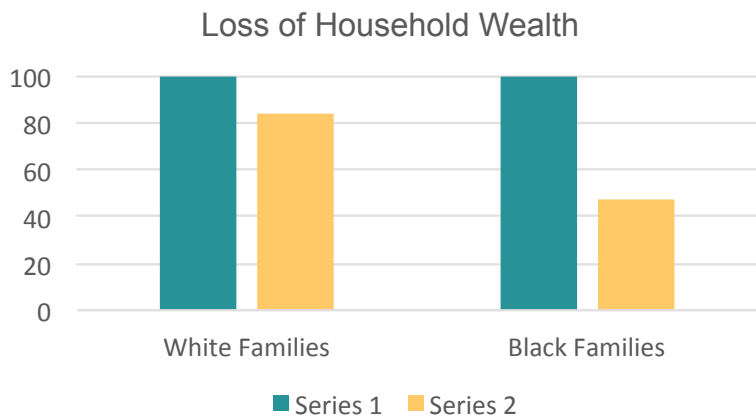
...and get hit harder by market forces

Black families lost more than half (53%) of their household wealth in the foreclosure crisis.

White families lost just 16% because a greater share of their wealth is in stocks, bonds, retirement funds, and savings accounts vs. home equity.

77% of white households vs. 39% of households of color in MN own their own homes. That gap is the nation's largest and the biggest since 1990.

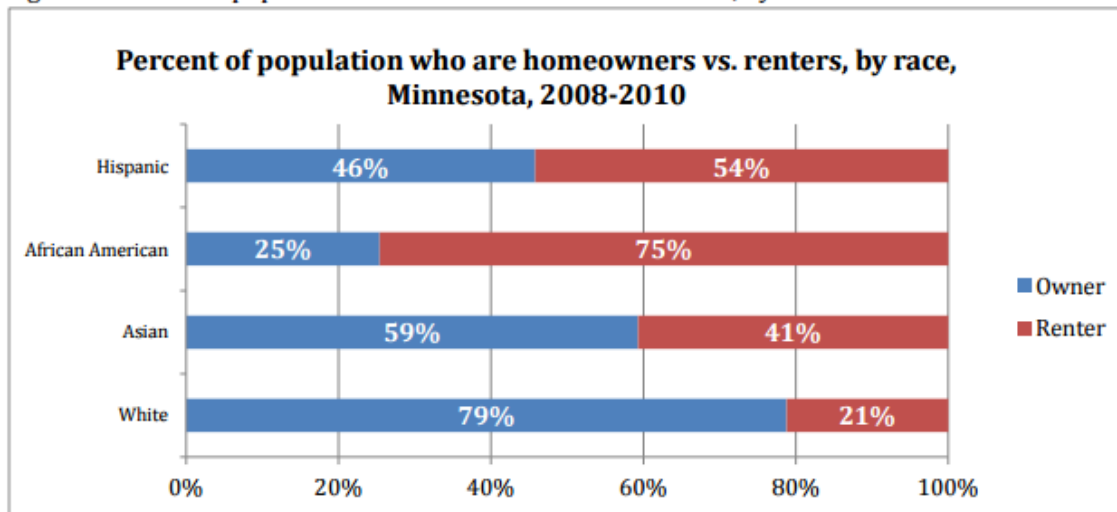Just 23% of foreign-born Black residents and 26% of African-Americans in Minnesota own homes.

In North Minneapolis prices fell so far that a homeowner who bought in 2006 at the neighborhood's median price would need to see their 2013 home value increase by 85% to return to its purchase price. In southwest Minneapolis, home prices returned to pre-crash levels. (2012 Minnesota Compass report)

Loss of Household Wealth

Bar chart comparing White Families and Black Families with Series 1 and Series 2.

■ Series 1 ■ Series 2

All communities of color face housing discrimination

Figure 1. Percent of population who are homeowners vs. renters, by race

Percent of population who are homeowners vs. renters, by race, Minnesota, 2008-2010

Race	Owner	Renter
Hispanic	46%	54%
African American	25%	75%
Asian	59%	41%
White	79%	21%

Source: U.S. Census Bureau, 2008–2010 American Community Survey, 3-Year Estimates.

The Case for Reparations

"Two hundred fifty years of slavery. Ninety years of Jim Crow. Sixty years of separate but equal. Thirty-five years of racist housing policy. Until we reckon with our compounding moral debts, America will never be whole."

- Ta-Nehisi Coates

Inside the Battle for Fair Housing in 1960s Chicago

Discussion Questions

- **What new information or perspective did you gain from this section?**

- **What impact has redlining had on North Minneapolis? Transportation policy? What other issues has it affected?**

- **Are philanthropic efforts to address employment and income gaps at risk without addressing the wealth gap? If so, how so?**

- **What is the common narrative and cause of the housing, wealth, and income gaps?**

- **What does your foundation currently do to change that narrative and educate your peers and policymakers?**

- **What protections are in place to prevent it from happening again?**

- **What policies are perpetuating these disparities today?**

- **Do public agencies assess disparate impact of policies and funding? Do they work together to evaluate the cumulative impacts of policies?**

- **Are public investments applied in a way that benefits an entire community?**

- **What implications does this have for philanthropy?**

Great Ways to Learn More

Peer-to-Peer Learning & Mentorship:

- Arrange peer groups or mentorships by what stage members are at (emerging, growing, leading)

- Consider engaging experienced facilitators

- Create a biannual calendar to be intentional about progression

- Facilitate shared goals and expectations for the learning cohort

Further Develop Cultural Competence & Confidence

- Assess implicit biases (before engaging community)

- Pursue additional resources: The Color of Fear, Mirrors of Privilege

- Diversify the media you consume

- Consider your organization's language and its implications and impact

- Assess ways in which your organization perpetuates exclusion and inequity

- Learn about the history of the community you serve

Explore Policy Advocacy

- Pursue policy advocacy skills workshops

- Attend sessions by other groups to better understand factors including North Minneapolis

Session 2
Accountability

We need **Engagement**
with the community
to accurately identify needs and
define, measure, and cooperatively
achieve success.

TABLE OF CONTENTS

How Do You Define Community?
### To be accountable, we need to know to whom we're accountable

- Who is your foundation intended to benefit?

- Do you "serve" a specific geographic community, a demographic group? If it's the entire community, how do you target and prioritize investments? How do you measure success?

- Have you explicitly defined "community" in your internal or external communications?

- How have you changed your grantmaking guidelines, application processes, community relations strategies, board development, staffing, and professional development as a result of your definition of community?

- Do the members of the community you serve know you? Should they?

- How well do you know the communities you serve?

_____

_____

_____

_____

_____

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Role Negotiation
A shared leadership strategy

- Who is leading our strategy?

- In what specific ways can we be a partner rather than a driver?

- Who do we consider "experts?"

- Do our actions and communications convey this?

- See some sample models of leadership below.

Foundation   **Nonprofits**

Community*

Foundation   **Nonprofits**
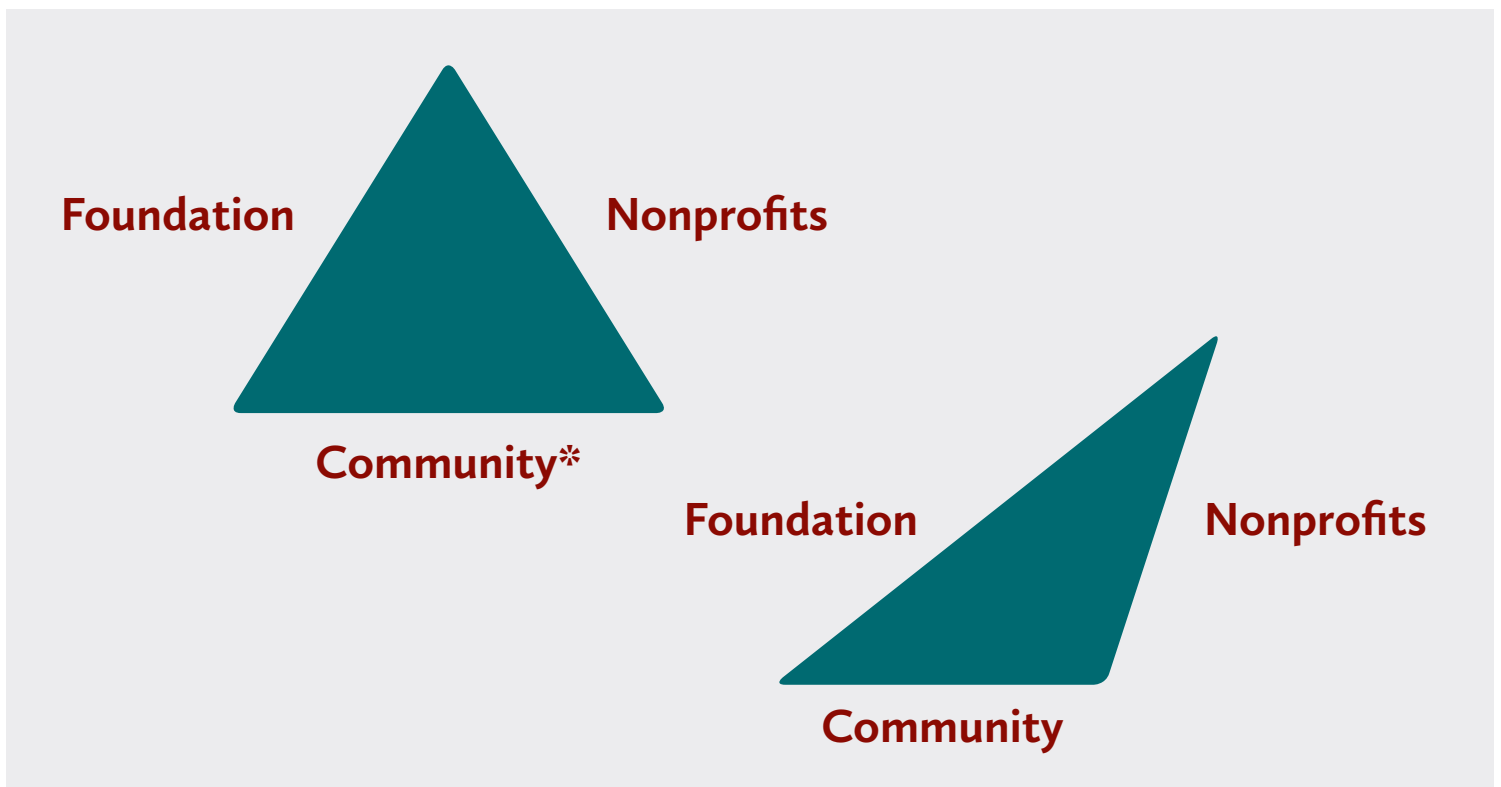
Community

Draw your foundation's current model of leadership.

Foundation   **Nonprofits**

Community*

Informing Our Thinking

SOURCES

Where do you/does your foundation get information about community needs? _____
_____

Where do you get information about effective solutions?_____

Do you seek quantitative and qualitative data? ☐ Yes ☐ No

Is your information unfiltered and directly from the community or shared with you by an organization whose racial composition more closely reflects yours? _____

ANALYSIS

Does your foundation engage with the community around data on problems or solutions? ☐ Yes ☐ No

If so, how?_____

How has your thinking changed as a result? Were any assumptions challenged? _____

Do you factor in intersectionality? ☐Yes ☐ No

If so, how?_____

RESPONSE

Does your foundation have a theory of change? ☐ Yes ☐ No

If so, what is it? _____

Does it address racial equity explicitly? ☐ Yes ☐ No I f so, how?_____

Have you tested our theory of change? ☐ Yes ☐ No If so, how and with whom?_____

Are all board and staff familiar with it? ☐ Yes ☐ No

Are your constituents? ☐ Yes ☐ No Do they endorse it? ☐ Yes ☐ No Do they have agency in it? ☐ Yes ☐ No

MEASUREMENT

What is your foundation's definition of success? _____

How do you measure it? Who determined this? And through what process? _____

How do you get feedback along the way?_____

Data:
Not as Objective as We Like to Think

Data

Data is important. It's also biased by who commissions it, frames it, and analyzes it. It's also important to balance quantitative and qualitative data. Following are a few case studies.

1. RESEARCH, INTERPRETATION & HOW IT GETS REPORTED HAS CONSEQUENCES

"Poorer families care more about other factors — and less about academics." This was one of the major findings reported in a January 2015 NPR news article from a study conducted by Tulane University's Education Research Alliance for New Orleans. In the study, researchers examine what factors influence parental school choice in a city where over 90% of students attend charter schools i.e. parents effectively have free will to choose what schools their children attend.

The findings of this study bucked common thinking and promised to have a larger impact on issues of equity around education. If, even when given the choice, low income families still chose schools with poorer academics, how could we effectively close the achievement gap, NPR's coverage asked? After all, these low income families simply seemed to care less about academics than higher income families.

Talking about their study, the researchers heralded it as, "one of the most extensive analyses of school choice and parental preferences conducted in any city." Yet, not a single New Orleanian parent, the people whose choices and preferences were being studied, was included in the study. Instead, researchers relied solely on data from the centralized school application system in which New Orleans parents rank preferred options.

Using only this quantitative data, researchers paint a picture of low and very-low income families acting against their own self-interest without the qualitative data to understand why this is so. Briefly acknowledging that factors such as income level and practical considerations such as proximity to home and after-school activities may affect parent choice in low income families, researchers and reporting on the study nonetheless concludes that these families are not as concerned with academics without providing backing for these claims.

Rather than making inferences, studies should incorporate key stakeholders in order to better understand and come up with solutions for the issue at hand. Painstaking measures applied to collecting and analyzing quantitative data should also be applied to the collection of qualitative data from the community's most affected by an issue. While quantitative data can point us to the problem (i.e. families who could benefit the most are choosing lower performing schools), it doesn't help us understand why (what are the barriers families are facing to accessing these higher performing schools?) Ultimately understanding what motivates individuals and communities to make certain choices is crucial to driving sustainable change.

Case Study

2. LACK OF UPFRONT COMMUNITY INVOLVEMENT CAUSES LACK OF TRUST, IMPACT, DOLLARS & DELAYS

The Minnesota Department of Employment and Economic Development (DEED)'s North Minneapolis Workforce Center offers resources to job seekers and businesses. When the building needed repairs and space, DEED pursued a greater redevelopment effort in North Minneapolis with an expanded Workforce Center with DEED as the anchor tenant. The City of Minneapolis approved the plan, a new location was proposed, and a commercial developer was contracted.

The community opposed the development project immediately: for its location, lack of culturally relevant and improved services, and the fact that people outside the community would benefit from the development of the expanded center through jobs and income. It seems there had been a major oversight during project planning: planners and funders had failed to adequately engage, inform, or seek input from Northside residents on what was essentially a workforce project in their own backyard. Community members approached DEED and they created a community advisory committee to facilitate a community engagement process for input in redesigning the new Workforce Center.

Although the committee was successful in gathering useful community input on the project, community trust in the project was faltering. The committee lacked adequate staff support, the developer lacked DEED and community support, and communication between the committee and DEED was breaking down. The project stalled as scopes and timelines were shifted to reflect changing goals for the project.

Then DEED engaged Nexus Community Partners' Community Engagement Team (CET), a North Minneapolis agency. The CET began the process with a crucial step, meeting with key community leaders to learn if they supported CET's involvement. The answer was yes. CET has since used its targeted strategies to engage Northside residents in planning, decision-making, and implementation of the Workforce Center project.

DEED's new Workforce Center is slated to open its doors in October 2016 as "a unique collaborative effort in North Minneapolis that will bring together employment services, education, health care and community organizations dedicated to building prosperity in North Minneapolis."

3. QUANTITATIVE & QUALITATIVE DATA THROUGH A COMMUNITY-LED PROCESS LEADS TO IMPACT

The Northside Achievement Zone (NAZ) is a collaboration of community organizations building a culture of achievement in a geographic zone in North Minneapolis to assure all youth graduate from high school college-ready. Prior to launching, NAZ designed and carried out a Community Survey in collaboration with Wilder Research, an independent nonprofit research center:
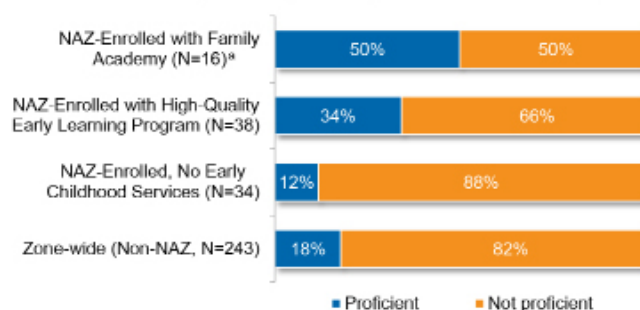
- To gather in-depth data about how the kids in the zone are doing, in and out of school
- To assess what parents think about the community and the extent to which it is supportive of children to do well in school (referred to as the "microclimate" of the Zone)
- To provide a baseline against which to measure progress toward key outcomes

NAZ and Wilder collaborated on both the survey design and the methods for interviewing. With the expectation that many households would lack stable land-line telephone service, an in-person, door-to-door survey method was chosen. Specially trained NAZ outreach staff served as the interview team. The survey was designed to be done face-to-face through visits to a randomly-selected set of addresses in the Zone. If the household included one or more children (ages 0 to 18) they were asked to participate in the survey, which took approximately 10 minutes to complete, after which respondents were given a $10 gift card in thanks for their time. Information cards were left if no one was at home, informing residents of the survey and inviting them to call the office to do it by telephone.

All respondents were asked a core set of 30 closed-ended questions and one open-ended question, covering overall impressions of the social cohesion, informal social ties, and safety of the neighborhood; parents' awareness of NAZ; families' participation in recreational, mentoring, or parenting programs; extent of walking in the neighborhood or using neighborhood parks; access to health care and transportation; the extent to which the neighborhood supports children to be successful in school; and how important parents felt it was for their children to go to college. It also collected demographic information on length of residence and frequency of moves, number and ages of household members, and race/ethnicity. The survey included 10 questions that have been used in other studies of community well-being and that measure collective efficacy, which is defined as "social cohesion among neighbors combined with their willingness to intervene on behalf of the common good."

NAZ scholars (NAZ-enrolled students) who had enrolled in high-quality early learning programs tended to enter kindergarten more ready than their counterparts (Figure 2). If their parents also graduated from a Family Academy program, their rates of kindergarten readiness were even higher. By contrast, scholars enrolled in NAZ who received neither of these solutions had significantly lower readiness rates than their Zone-wide peers.

The overall construct of collective efficacy is made up of two components: social cohesion (the extent to which individuals in a community feel connected to each other) and informal social control (the extent to which neighbors are inclined to take action together to promote the well-being of the overall community). Higher levels of collective efficacy have been shown to be associated with a range of other measures of community well-being, including lower levels of violence, teen birth rates, asthma, and obesity.

2. Percent of entering kindergartners proficient in BKA literacy test, 2014

	Proficient	Not proficient
NAZ-Enrolled with Family Academy (N=16)*	50%	50%
NAZ-Enrolled with High-Quality Early Learning Program (N=38)	34%	66%
NAZ-Enrolled, No Early Childhood Services (N=34)	12%	88%
Zone-wide (Non-NAZ, N=243)	18%	82%

■ Proficient ■ Not proficient

* 15 of the 16 scholars in the Family Academy group also had been enrolled in high-quality early learning programs.

Another NAZ strategy focuses on screening all preschool scholars every six months, with an emphasis on age 3, to identify and address learning barriers early.

NAZ's annual reporting measures participant outcomes as well as the effectiveness of their strategies.

Power Dynamics

Even when foundations acknowledge and wrestle with the power dynamics inherent in foundation philanthropy...We're often guilty of the same biases regarding data.

For example, when we read surveys of what grantees want, how often are foundations the ones:

- Defining the problem?
- Asking the questions?
- Answering the questions?
- Analyzing the results?
- Reporting the findings?
- Monitoring impact?

When we seek feedback on our grant guidelines and processes, do we ask:

- Grant recipients?
- Applicants?
- Community organizations who haven't applied?

Are we in spaces where we'll hear candid reflections that we can learn from?

- Do we seek it out?
- Do we reflect and act on it?

NOTE: NFG will coordinate an effort to solicit direct input from North Minneapolis organizations so they don't get 20 different requests to participate in surveys, listening sessions, etc. from NFG members.

Grantee Themes We've Heard

(paraphrased interview responses due to duplicate responses and to maintain confidentiality)

DON'T MARGINALIZE US. Don't tokenize organizations of color or funnel us into a separate giving portfolio where we compete against each other for limited "diversity funds." Foundations defer to white and are typically willing to fund white-led organizations at higher levels with lower bars for accountability.

GRANTEES OF COLOR CAN'T MAKE A MISTAKE. Expectations are higher and we have a shorter amount of time to show results than other organizations. We face a higher bar and constantly have to prove ourselves.

SEEK OUR INPUT EARLY. We feel respected when funders ask for our input. It's most efficient and mutually rewarding when it's early in the process – whether about community needs, effective approaches, cultural preferences, or grantmaking.

VALUE OUR TIME. If you value our work, fund us. Don't make us apply over and over again, as it takes time away from our mission. Also, when we perform a service outside of our grant, recognition or a stipend is always appreciated.

Grantee Themes We've Heard

(paraphrased interview responses due to duplicate responses and to maintain confidentiality)

LIVE YOUR VALUES. Funders should meet their own expectations about diversity, inclusion, and equity, and accountability before requiring it of us.

ASK US HOW BEST TO ENGAGE WITH OUR COMMUNITY. While volunteer efforts are appreciated, they can: 1) require a lot of staff and financial resources that could be put to better use, 2) create distrust, privacy concerns and a less welcoming atmosphere for our constituents, 3) create a paternalistic or white savior dynamic.

EQUITY ISN'T A NUMBERS GAME. Funders often focus on board diversity as equity rather than sharing power and dismantling hierarchical structures. It's about community voice, community-driven solutions, building a culture that embraces racial equity, e.g., hiring people from the community.

RESPECT OUR EXPERTISE. We appreciate new ideas, but program officers often present themselves to us as the experts, telling us what to do. Also white-led organizations doing the same work we do are more likely to be funded and their leaders given platforms and influence.

Grantee Themes We've Heard

(paraphrased interview responses due to duplicate responses and to maintain confidentiality)

WHO'S IN CHARGE? Funders must consider if they're primarily supporting organizations *WORKING IN* communities of color or **LED BY** people of color – and are the latter tokenized?

WHO'S AT THE TABLE? To make different decisions, you need different people at the table deciding what the focus is and who gets the funding. Not just people of color and nonprofit/foundation staff but people with deep understanding of what racial equity means in real time and on the ground including intended "beneficiaries."

LOTS OF TALK, LITTLE CHANGE. Racial Equity feels like the newest buzzword in philanthropy. People in the Twin Cities are getting better at talking about racial equity, but not taking the next step. To achieve Racial Equity you have to do something different from what you are currently doing.

BABY STEPS FOR A BIG PROBLEM. I don't see foundations making the big infrastructural improvements. Foundations tend to conflate racial equity with diversity rather than addressing power structures, white supremacy, and the distribution of wealth.

Grantee Themes We've Heard

(paraphrased interview responses due to duplicate responses and to maintain confidentiality)

POWER DIFFERENTIALS. Many funders are aware of the power differential and work to lessen it. Funders have power because they have economic resources but we (community, organizations, leaders) have power because we know how to do this work, we have a track record, and we've sustained our organizations over time.

REDEFINING SUCCESS. Funders could expand their views on what a well run program should look like. Many funders – and organizations – have a really narrow view of this. If we are going to be more diverse and equitable, we have to have a broader perspective on what 'right' is, what 'good' is.

JOINT FUNDING. We get nervous about funding collaboratives. They sometimes lead to divvying up investments (resulting in fewer resources for organizations) or channel all of their resources through one organization – especially problematic when that organization doesn't have a racial equity approach.

Community Events

Engagement through Events: Assessment

Engaging in community events can be a valuable learning experience for funders. These events provide a unique opportunity for funders to learn about the strengths of a community or a grantee, without wearing the 'funder' hat. Consider the community events you've attended on behalf of your foundation in the last year using the assessment below.

Event	Who Attends?	What do you give?	What do you get?	What does the community give?	What do they get?
Sample	North Minneapolis civic leaders	2 hours of time	Networking with other funders	Time, staffing, space, food, expenses	Exposure to funders, platform to share info

Discussion Questions

- How much time am I spending in the community?

- Did I attend enough events to get to know the community better?

- Am I engaging a broad cross-section of community members or the same people?

- Have I intentionally stepped outside of my comfort zone?

- What was I there to do? Did I achieve that? Was my approach effective?

- How did I apply what I learned to the foundation's grantmaking or operations?

- How did my attendance contribute to existing power dynamics between foundations and the community?

- What could I have done differently?

- Has my participation added to or detracted from resources available to the community to address their own challenges?

- Who usually represents my foundation at community events? What does that signal?

- What gaps in knowledge and engagement does this exercise expose?

- What changes will I make starting today?

IN WHAT OTHER WAYS DO I PERSONALLY ENGAGE IN THE COMMUNITY?

- ☐ Live there
- ☐ Work there (rent/own office space)
- ☐ Kids attend school there
- ☐ Social – visiting friends
- ☐ Hiring/Recruitment
- ☐ Shopping
- ☐ Recreation
- ☐ Dining
- ☐ Using Local Service Providers
- ☐ Attending Neighborhood Festivals or Events
- ☐ Worship
- ☐ Other _____

Learning from Giving within the Community

How do you acknowledge, engage with and learn from philanthropists and donors of color?

What priorities can you discern from their giving?

How can you augment their giving?

Giving Traditions

In addition to charitable donations to nonprofit organizations, historic giving avenues among indigenous communities and communities of color include:

- Mutual Aid Societies
- Social Networks
- Houses of Worship
- Fraternal Societies
- Tribal Councils
- Abolition & Civil Rights Movements
- Remittances
- Giving Circles
- Historically Black Colleges & Universities

CULTURES OF GENEROSITY

- **African-Americans give away 25% more of their income per year than whites**
- **63% of Latino households make charitable donations**

Learn about giving traditions in the communities your foundation serves.

Conclusion: Shared Leadership

- Draw your current model (again) and your ideal model of leadership below.

- Has your thinking changed regarding this picture?

- Has your view changed about your foundation's accountability to the community?

- Is there are a particular practice of your foundation that, if changed, could significantly alter the shape of the triangle?

CURRENT

Draw triangle within space below

Foundation   **Nonprofits**

Community

IDEAL

Draw triangle within space below

Foundation   **Nonprofits**

Community

Session 3
Action

We must be intentional about developing skills and adopting **policies** and **practices** that advance racial equity in our foundation.

TABLE OF CONTENTS

The Continuum

Racial Disparities →

Race Neutral →	Race Conscious →
Omits race for consideration in policies and programs – instead references alternatives that focus on individual characteristics or socioeconomic status	**Argues for race/ethnicity as a variable in public policy and program design, notably in understanding how outcomes are racialized**
To achieve mission and goals without naming race explicitly in problems and solutions	To ensure policies, programs, and practices account for how racial inequities shape outcomes of well-being
Ignores the persistence of racial disparities in outcomes of well being, the manifestations of racism in opportunity domains and vast research showing how policy benefits and program services are not received equitably by communities of color	Some race-conscious proposals rely on racialized stereotypes; play down or dismiss the intersection of race, class, gender, sexuality and others; and may not be rooted in solutions that examine the root causes of racial inequalities
Race and ethnicity are neither examined nor addressed in foundation's internal operations or grantmaking	Grants and grant strategies address how race and ethnicity shape experiences with power and access to opportunity

Racial Equity

Diversity & Inclusion

Focused on diversifying the workforce and the field as a way of better addressing the changing demographics of our country and world, "diversity" defined broadly as culture, experience, and points of view

To foster a diverse institution for better achieving institutional prosperity, unleashing innovation and creativity, and strengthening public appeal, impact, and effectiveness

At times conflates categories of inequality (marginalized populations) with categories that merely denote difference (work styles, political partisanship). Further, more salient definitions typically focus on race and gender, excluding sexuality, gender identity etc.

Concerned with diversity in foundation staff and trustees, among program participants and policy beneficiaries, and overall grants

Structural Racialization

Moves beyond individual and institutional racism to explore how a broader system of long-held historical policies, practices, and values across institutions have created racialized hierarchies of power and continue to produce inequitable outcomes in well-being for people of color

To examine and address the multiple systems impairing the well-being of all people of color

Given the magnitude of structural racism, strategies to address it are complex and might be more difficult to implement

Sharpens the focus on outcomes, uncovers patterns of inequity, separates symptoms from causes, reveals how race relates to all groups and can be used with other lenses

Race Neutral

- ☐ Doesn't collect and disaggregate program or operational data by race/ethnicity
- ☐ Proposes "universal" strategies, presumed to work for all people
- ☐ Presumes that all grantees can work with all groups
- ☐ Doesn't see diversity as important organizational consideration
- ☐ Believes lifting up issues of race/ethnicity will create conflict
- ☐ Has no accountability measures for equity, diversity, & inclusion
- ☐ Discourages the formation of racial/ ethnic affinity groups

TOTAL_____

Race Conscious

- ☐ Doesn't collect & disaggregate operational data by race/ethnicity
- ☐ Proposes "universal" strategies, presumed to work for all people
- ☐ Invests in grantees w/ similar backgrounds to their own
- ☐ Sees diversity as an important organizational consideration
- ☐ Offers cultural competence training & cross-cultural learning
- ☐ Has accountability metrics for diversity but not equity or inclusion
- ☐ Supports the formation of racial/ethnic affinity groups
- ☐ Wants but doesn't have a diverse staff and board

TOTAL_____

Foundation Self-Assessment

Diversity & Inclusion

- ☐ Collects & disaggregates data by race/ethnicity but doesn't know what to do with it
- ☐ Underwent anti-racism training but doesn't know what to do next
- ☐ May not appreciate the distinction between equity and diversity/inclusion
- ☐ Has no staff or management accountability for diversity, inclusion, and equity
- ☐ Has no affinity groups working on equity, diversity & inclusion
- ☐ Decision-makers reflect the community they serve

TOTAL_____

Structural Racialization

- ☐ Disaggregates and analyzes data and uses it to inform decision-making
- ☐ Proposes targeted strategies that have been put through a racial impact analysis
- ☐ Understands and communicates that racial equity is mission-critical
- ☐ Has staff and management accountabilities for diversity, inclusion, and equity
- ☐ Views diversity as value-add for organizations; inquires about cultural competence of staff and grantees
- ☐ Supports affinity groups
- ☐ Influences peers to apply a racial equity lens to their giving

TOTAL_____

The Roadmap

1.
MAKE THE CASE

- Identify a few peers at your foundation to help you advocate for racial equity as mission-critical priority
- Gather data (organize it by the Triple Bottom Line) to support your case
- Use that data to seek CEO support

2.
CEO BUY-IN

- Starting this work without full CEO support and management team commitment to adoption of best practices can lead to unresolved tensions, disappointment and wasted resources, internally & with the community

3.
BUILD THE TEAM

- EQUITY COACH – consider hiring an Equity Coach to guide the work
- RACIAL EQUITY COMMITTEE – establish a staff committee to lead the work; define scope & roles, especially regarding decision-making & communication

4.
USE EFFECTIVE TOOLS

- NFG RACIAL EQUITY TOOLKIT – have all staff participate in all three sessions & complete the activities
- CULTURAL COMPETENCY TRAINING – consider a Staff Assessment Tool (e.g., the IDI*) & training

*NFG members say effectiveness depends on effectiveness of the consultant

5.
INTERNAL REVIEW

- Committee uses toolkit inventories to identify ways to improve policies, procedures, guidelines, etc.
- Committee engages community as advisors/partner in change
- Committee makes recommendations

6.
ADOPT CHANGES & SET GOALS

- CEO & Management Team evaluate and adopt recommendations as appropriate
- Set foundation Performance Goals regarding Racial Equity
- Engage the board and establish an on-going engagement model to ensure that policies and practices are institutionalized for sustainability.

7.
COMMUNICATE GOALS & CHANGES

- Foundation communicates goals, changes and process to staff, board, and community

8.
ACCOUNTABILITY

- Committee continues to lead this work (culture shift, ongoing training, etc.)
- Establish Feedback Loops – with staff, board and the community, qualitative & quantitative

Your Triple Bottom Line
A Template for Making the Case

Improved Internal & External Relations

- How we live our value of racial equity with the community: _____
- With our staff: _____
- With a racial equity lens we can better: _____
_____
_____
_____

Greater ROI on Investments

- How much we've invested to date: _____
- The impact: _____
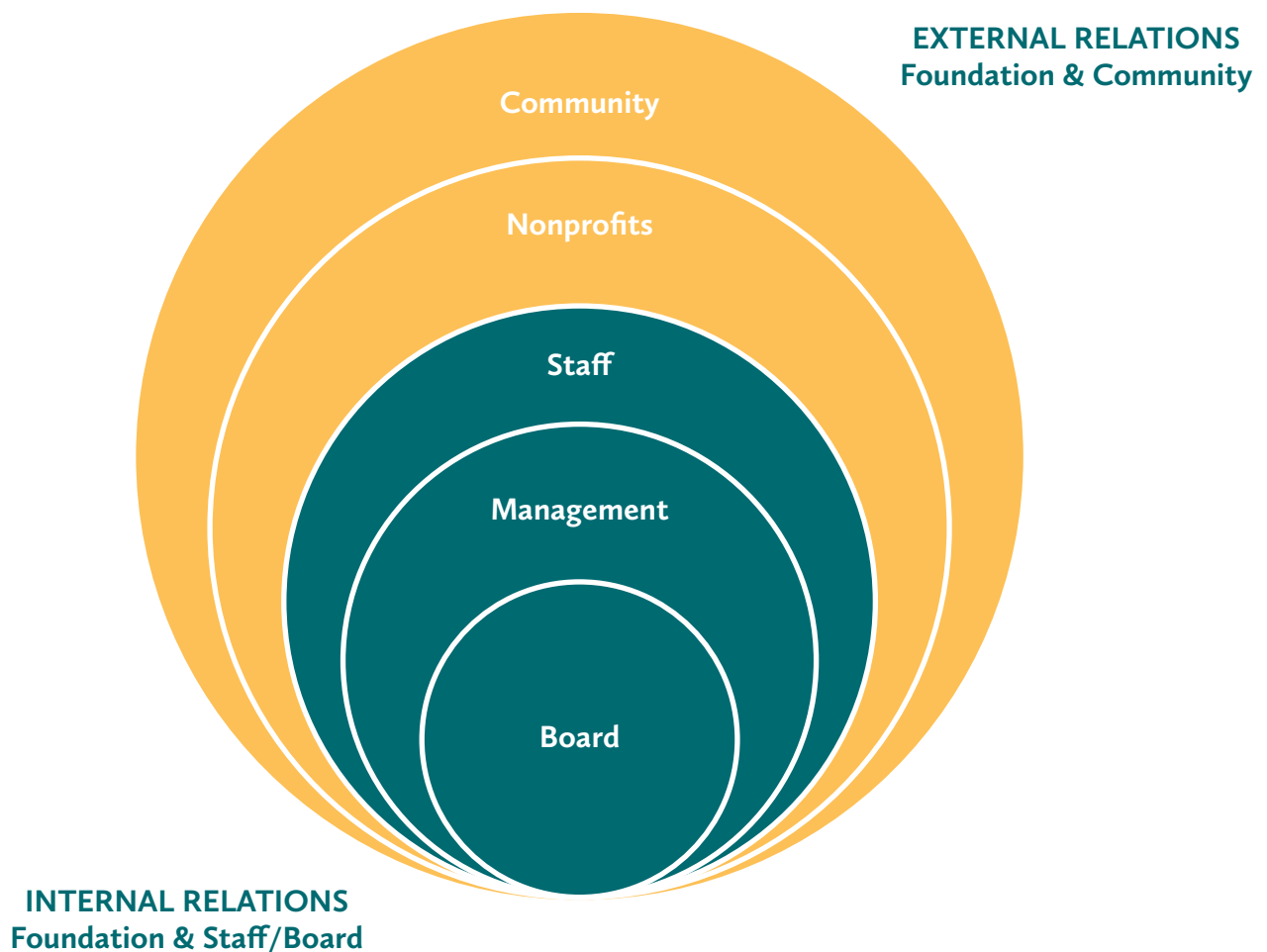- With a racial equity lens we can better: _____
_____
_____
_____

Accelerated Community Impact

- Our vision for the community: _____
- Today's reality: _____
- With a racial equity lens we can better: _____
_____
_____
_____

Alignment Needed to Achieve Racial Equity

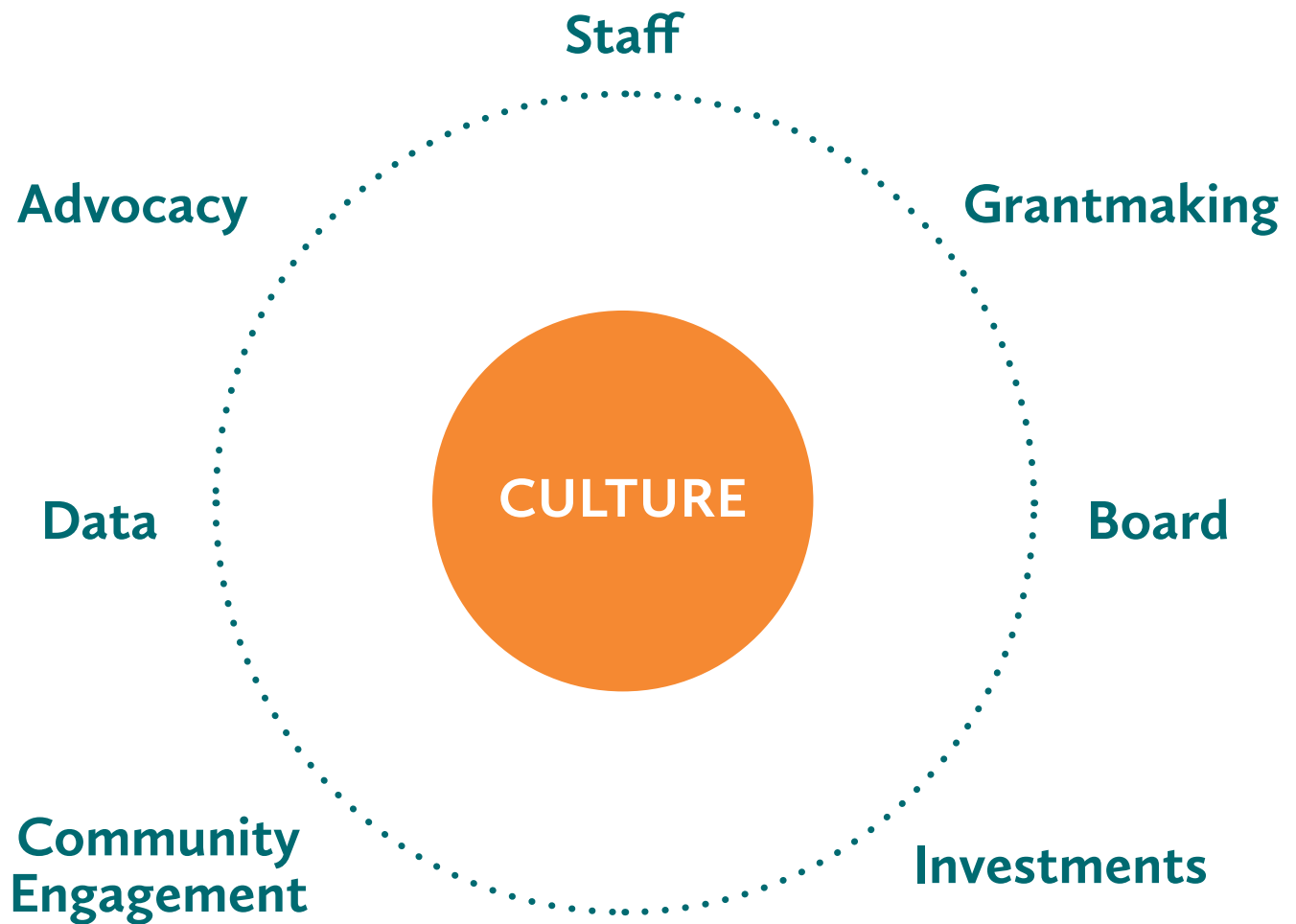**WITHOUT WALKING THE TALK...**

Disconnect between Words & Actions
+
Relationships with Staff, Board & Community
Not as Strong as They Could Be
+
Lack of Understanding & Shared Ownership
=
Low Impact

EXTERNAL RELATIONS
Foundation & Community

Community

Nonprofits

Staff

Management

Board

INTERNAL RELATIONS
Foundation & Staff/Board

How can we operationalize racial equity?
Where do we start?

Staff

Advocacy

Grantmaking

Data

CULTURE

Board

Community
Engagement

Investments

Spotlight on Staffing

Cleveland

PENN AVENUE

Folwell

LOWRY AVENUE

BROADWAY AVENUE

DUPONT AVENUE

McKinley

LYNDALE AVENUE

Hawthorne

STAFFING: Along the Continuum

Race Neutral

ID & address factors shaping current staffing: recruitment/ retention/ advancement

Orientation for all staff on foundation value of diversity and inclusion & background on community

Race Conscious

Recruit from community; look beyond demos / hire for cultural competence

CEO serves as Chief Diversity Officer; quantify impact of current staffing on community

Diversity & Inclusion

Develop intentional leadership pipelines, make salaries transparent; survey staff

All staff engage in implicit bias & cultural competence training; embed in workplans & apply practices in foundation

Structural Racialization

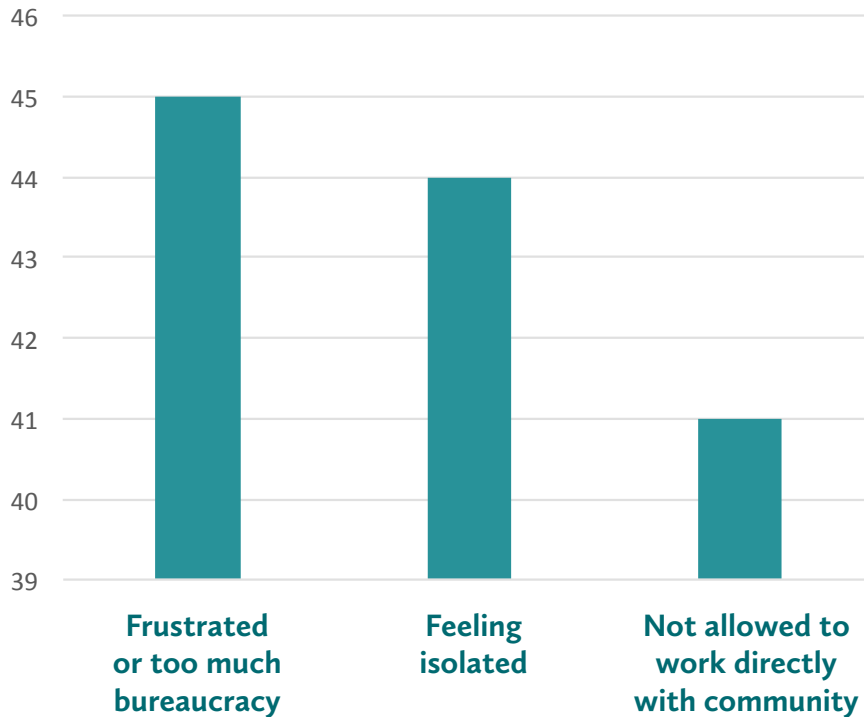Fight public policies that negatively impact inclusive hiring & retention

Report outcomes to the community. Use them to evaluate staff & modify programs and operations

Why do professionals of color leave?

Here's one answer as to why some Black professionals leave the philanthropic sector. In T*he Exit Interview: Perceptions on Why Black Professionals Leave Grantmaking Institutions*, by ABFE A Philanthropic Partnership for Black Communities, survey respondents said:

Bar chart showing: Frustrated or too much bureaucracy = 45; Feeling isolated = 44; Not allowed to work directly with community = 41.

"This sense of isolation may be due to politics, a complex organizational culture, lack of diverse staff, and/or a glass ceiling that becomes apparent at an organization's mid-level.

Limited professional-track training, pipeline networks, and support systems may challenge efforts to engage and retain qualified Black professionals who have an affinity for a career path in philanthropy.

Black philanthropic professionals sometimes feel their expertise is not valued by colleagues during internal grantmaking conversations.

Program officers in particular often feel discouraged by how heavily their grant dockets are scrutinized. For those who work strategically to include a racial justice or equity lens in their grantmaking, they sometimes feel that they are required to lift up external resources and authorities to make the case for their decision-making—and that the depth and breadth of their own expertise is not trusted.

The perceived disproportionate amount of time spent on paperwork and process vs. engaging directly with communities leads to a feeling of heightened bureaucracy."

That's not what motivated many of the surveyed professionals to join philanthropy – they wanted to use their expertise to make an impact in their communities.

Learning from Other Fields
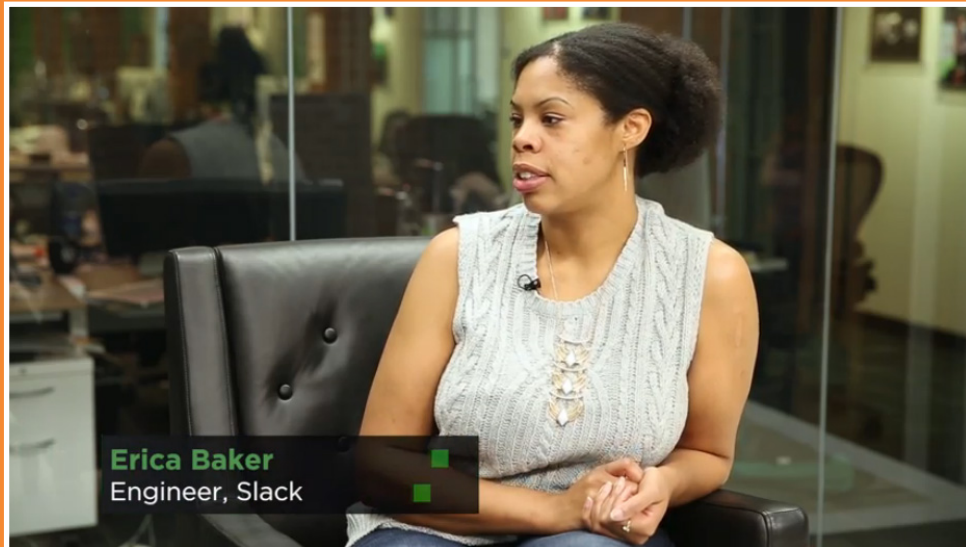
Erica Baker on Creating an Inclusive Corporate Culture

Joelle Emerson on Hiring for Diversity

TechCrunch interview series

Hiring & Evaluating Staff Regarding Racial Equity, Diversity & Inclusion

These skills can be evaluated the way other job-related skills are, including through interview and performance management questions. Here are some examples:

- ☐ What kinds of experiences have you had working with others with different backgrounds than your own?

- ☐ Tell me about a time you had to alter your work style to meet a diversity need or challenge?

- ☐ How have you handled a situation when a colleague was not accepting of others' diversity?

- ☐ What does it mean to have a commitment to diversity and how would you develop and apply your commitment at this company?

- ☐ What was/is the diversity value at your current/former employer? What impact did you make on this value?

- ☐ What efforts have you made, or been involved with, to foster diversity competence and understanding?

- ☐ What have you done to further your knowledge about diversity? How have you demonstrated what you have learned?

Racial Equity Inventories

STAFFING: Racial Equity Inventory

Hiring

- ☐ JOB DESCRIPTIONS & REQUIREMENTS – Are all of the educational and work requirements really needed to perform this specific job?
- ☐ TEMP TO HIRE – If you use temporary agencies to find and evaluate candidates, does the broader community have access to your jobs?
- ☐ RECRUITMENT – Does your advertising (paid & through networks) elicit racially diverse candidates? How can you reach a stronger pool?
- ☐ APPLICANT SCREENING – Do you hire people overly qualified for your positions, thus keeping people with access to fewer formal credentials out? Have your staff who screen resumes had anti-implicit bias training?
- ☐ TALENT PIPELINE – Are you investing in a talent pipeline for people of color and in the community? Do you offer substantive internships?
- ☐ INTERVIEWS – Are your interview teams diverse to guard against implicit bias and to make candidates of color feel trust in the process?
- ☐ HIRING – How far do candidates of color make it in the process? Are they screened in to create a diverse pool or are they competitive?
- ☐ SALARY TRANSPARENCY – Do you negotiate salaries or make firm offers regardless of the candidate to ensure pay equity? Do you make salaries transparent to ensure raises follow performance guidelines and don't have hidden biases?

Staff Diversity & Trends

- ☐ REPRESENTATION – Are people of color represented at all levels and in all departments of the organization?
- ☐ ADVANCEMENT – Are people of color invested in as leaders and promoted? Are they aware of leadership development opportunities?
- ☐ RETENTION – Is the rate of turnover higher for staff of color than white staff? Have you investigated the causes?

- ☐ APPOINTMENTS – Are staff of color appointed to committees, to lead projects, other roles with authority in & beyond the foundation?
- ☐ INFLUENCE – Do staff of color influence (not just inform) foundation strategy?
- ☐ CULTURE – Is your culture inclusive and are aspects of it shaped by all staff (e.g., environment, activities, meeting styles, etc.)

Performance

- ☐ ORIENTATION – Staff gain grounding in history and context of community/ies served
- ☐ EXPECTATIONS – Are all staff held to equally high expectations and provided support to achieve them? Does everyone get to make mistakes? Is staff performance evaluated on results and measurable criteria that's shared upfront?
- ☐ DIVERSITY & INCLUSION – Are all staff and managers evaluated on their demonstrated cultural competence and ability to work effectively to create high-functioning racially inclusive teams? Are evaluations protected from implicit bias?

Staff Feedback

- ☐ SEEK IT OUT – Do you routinely gather staff feedback, include questions about racial equity? Do you review data for trends by race?
- ☐ DISCUSS IT – Do you openly share the feedback? Is your management team competent to discuss it productively?
- ☐ ACT ON IT – Do you make changes in response to the feedback? Have you gotten the same feedback more than once? Is this ok?
- ☐ ONGOING – Where do staff go with concerns about racism and racial equity? Are these taken seriously? What is the protocol?

STAFFING – Cultural Competencies
Racial Equity Inventory

Performance
- ☐ We hire for these skills in all positions
- ☐ We require training for all staff on these
- ☐ We know how to evaluate these
- ☐ We address the impact a lack of these skills may have on our grantmaking, community relations, staffing, and more
- ☐ Staff know they are expected to represent the foundation by being champions of racial equity

Awareness
- ☐ Knows own culture/position & its impact
- ☐ Awareness of personal biases and values
- ☐ Respects others' cultures, practices & beliefs
- ☐ Works well on behalf of others' differences
- ☐ Assesses & modifies behavior as influenced by privilege or internalized oppression
- ☐ Identifies instances of bias and oppression
- ☐ Identifies possible issues of intersectionality

Communication
- ☐ Listens to, hears, validates issues of oppression
- ☐ Sends & receives appropriate verbal and nonverbal messages
- ☐ Communicates effectively & with comfort about issues of race, power, & oppression

Actions
- ☐ Gathers/uses data appropriately
- ☐ Engages diverse staff, grantees, vendors
- ☐ Seeks knowledge about communities served
- ☐ Works towards mutually beneficial goals
- ☐ Can formulate a theory of change
- ☐ Recognizes appropriate tools re racial equity
- ☐ Can coach others on racial equity
- ☐ Applies racial equity lens to all of foundation

BOARD
Racial Equity Inventory

Composition
- [ ] Representative of community served
- [ ] Welcoming of diverse ideas
- [ ] Members have equitable influence on strategy and everyone's skills and perspectives are utilized
- [ ] No tokenization
- [ ] Members are selected from wide pools of candidates to expand opportunity
- [ ] Accommodations make it accessible to all

Policies and Norms
- [ ] Strategic Plan embeds racial equity in all aspects
- [ ] Board is accountable for equitable outcomes
- [ ] Decision-making principles evaluate emerging opportunities for racial equity
- [ ] Social norms and engagement opportunities are intentional and inclusive
- [ ] Board seeks/uses data & community input

Development
- [ ] Racial equity training required of all
- [ ] Cultural competency training required
- [ ] Members gain skills for future roles

Accountability
- [ ] Board members engage with/ learn from community
- [ ] Board members build knowledge outside board work
- [ ] Board sets and monitors metrics for equitable outcomes and takes responsibility for and action in response to poor results

GRANTMAKING
Racial Equity Inventory

Guidelines
- ☐ Informed by quantitative & qualitative data (from representative community members)
- ☐ Success and needs defined by applicants
- ☐ Clear theory of change for racial equity
- ☐ Investments explicitly target gaps (no universal approaches or "lifting all boats")
- ☐ Theory of change addresses intersectionality
- ☐ Grantmaking performance measured regarding equity
- ☐ Coordinated with peer funders for maximum impact
- ☐ Asset-based, recognize community agency

Application
- ☐ Shared intentionally to reach new groups
- ☐ User-tested for accessibility, ease
- ☐ Rationale provided for data requests
- ☐ Only requests relevant data
- ☐ Minimize requests for applications – invest in organizations' work rather than competitions

Review
- ☐ Score card created and used that protects against implicit bias
- ☐ Staff must also discuss how the funding will explicitly advance racial equity
- ☐ Values shifts in racial/community power dynamics (how) in addition to outcomes (what)
- ☐ Screen for diversity, inclusion AND cultural competency of applicants
- ☐ Applicants get feedback with final decisions

Grant Awards
- ☐ Allocations amounts align with the complexity of desired outcomes, e.g. Serving population with more complex needs = Increased allocation
- ☐ Include capacity funding even for project grants
- ☐ Provide cultural competency training to grantees – require progress for future $$
- ☐ Solicit and respond to meaningful feedback gathered in a safe manner from grantees and the community

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ADVOCACY
Racial Equity Inventory

Policy
- ☐ Develop & pursue a public policy agenda
- ☐ Use influence to champion racially equitable public policies and investments
- ☐ Engage grantees to better understand the situation and their goals
- ☐ Elevate voices of community experts
- ☐ Connect policymakers with community members
- ☐ Promote inclusive public decision-making: push for more representative advisory boards and effective community engagement
- ☐ Promote use of racial equity impact assessments by public agencies
- ☐ Ensure management and board understand legal boundaries of foundation advocacy and policy influence, and fully embrace the roles that you are *allowed* to play

Philanthropy
- ☐ Regularly champion racial equity with peers
- ☐ Advocate for diverse, inclusive conferences
- ☐ Share benefits of and lessons learned from becoming more racially equitable

Communications
- ☐ Mission & Vision address racial equity
- ☐ Explicitly discuss race in external communications (e.g., websites, annual reports)
- ☐ Explicitly discuss it in internal communications
- ☐ Intentionally craft narrative about the community that promotes equity vs. charity or deficit-mindsets & avoids reductive terms like "at risk," underserved, low-income
- ☐ Uses specific terms: if referring to Black people, say so, not people of color or "diverse" people
- ☐ All staff and board promote this narrative
- ☐ Create an event or activity to bring it to life

COMMUNITY ENGAGEMENT
Racial Equity Inventory

Accessibility
- ☐ Create an accessible, welcoming environment (online, in person, etc.) that promotes engagement & projects humility
- ☐ Organize engagement around community preferences
- ☐ All staff engaging with grantees/community are culturally competent
- ☐ Engagement strategies mitigate power dynamics
- ☐ Foundation leaders attend grantee/community events
- ☐ Be explicit about willingness to meet or talk with grantees

Respect
- ☐ Treat grantees as experts
- ☐ Establish a board of community advisors
- ☐ Value both quantitative and qualitative data
- ☐ Seek grantee feedback in developing RFPs
- ☐ Focus on strengths not just deficits
- ☐ Ask how to have a productive relationship
- ☐ Compensate for sharing of time, expertise, connections, input

Grantee Capacity Building
- ☐ Invest in capacity building for emerging organizations in communities of color
- ☐ Use intermediaries who have a racial equity analysis
- ☐ Support racial justice work of grantees
- ☐ Provide or underwrite technical assistance
- ☐ Providing support for data collection
- ☐ Introduce and champion grantees with other donors
- ☐ Ensure event sponsorship portfolio aligns with racial equity goals and values

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DATA
Racial Equity Inventory

Foundation Metrics

- ☐ The foundation's commitment to racial equity is reflected in its performance measures
- ☐ Every staff member has racial equity performance metrics
- ☐ The foundation holds itself accountable for achieving its racial equity goals
- ☐ The foundation reports transparently to the community about progress and analyzes and changes behavior/strategy based on results
- ☐ Metrics include both short and long-term benchmarks
- ☐ Metrics are rooted in equity and long-term change in power structure beyond improved outcomes
- ☐ Community perspectives should shape the metrics
- ☐ Metrics are targeted enough for all staff and board to use to apply a theory of change to new opportunities/needs and talk about their mission and grantmaking guidelines

Community Data

- ☐ Qualitative and quantitative data shape strategies
- ☐ Qualitative and quantitative data are used to screen and report on grantees
- ☐ A racial equity lens is used to analyze data not just accept it at face value (e.g., consider who is asking the questions, interpreting the results, etc.)
- ☐ An intersectional lens is used to analyze data
- ☐ Community members are tapped to interpret data

Metrics

- ☐ Salary scales are competitive, equitable, and living wage
- ☐ Hidden benefits (retirement, parking, etc.) are addressed and equitable: child care subsidies, public transportation, etc.
- ☐ An employee-assistance plan is in place and promoted to staff for financial emergencies

FINANCIALS
Racial Equity Inventory

Invest

☐ The foundation uses a Racial Equity Investment Screen and proxy voting to ensure our investments match our values

☐ The foundation participates in revolving loan programs to benefit residents and businesses of color in our community

☐ The foundation speaks out against racist lending practices and put out money in institutions that actively address it

☐ Our budget is reviewed through a value lens as well as a financial one

☐ All staff see and understand the budget

☐ The foundation offers referrals to assessments and trainings for vendors to increase cultural competency and racial equity

☐ The foundation advertises opportunities for contracted work – if not by project (due to inefficiency) then annually to create a broader pool of racially diverse vendors

☐ The foundation underwrites and uses directories of minority-owned businesses

☐ The foundation contributes to financial and technical assistance programs to support and sustain emerging minority-owned, locally-owned businesses in our community

Vendors

☐ Goal established that all staff contribute to re % of contracts and % of dollars for minority-owned businesses – all staff and all departments are responsible for meeting this goal

☐ We track and publicly report on progress towards this goal

☐ Our commitment to racial equity is explicitly discussed with all vendors and we share our expectations about the hiring and retention practices of vendors we engage

Staff

☐ Salaries and benefits are competitive, equitable, and living wage and allow for savings

☐ Personnel benefits are accounted for and acknowledged (retirement, parking, child care subsidy, public transit)

☐ An employee-assistance fund is available and promoted to staff for financial emergencies

Stories from the Field: Foundations Who Have Moved along the Continuum

Race Neutral

MAKING THE CASE FOR GREATER IMPACT BY USING A RACIAL EQUITY LENS

A foundation awarded its reproductive rights grants mostly to white-led organizations focused on resisting attacks on abortion rights.

At the same time, an emerging group of women-of-color-led organizations were focusing on reproductive justice, such as the right to have children, and freedom from sexual violence and abuse.

Board members weren't connected to the reproductive justice issues and organizations. Some argued that it would take attention away from pro-choice efforts. Still others worried that investing in just a few tiny organizations would have little impact.

Race Conscious

The program officer drew on external expertise to present an analysis of women of color as central, not marginal, to the field and frame a strategic role for the foundation.

Specifically, the program officer:

Hosted a series of respected speakers to educate and motivate the board on reproductive justice issues.

Presented a rationale for funding reproductive rights as a "smart strategy": that abortion rights efforts would be stronger when connected to broader issues and growing constituencies.

Argued that their small foundation could make little difference in mainstream world of reproductive rights but have a disproportionate impact by leading the way in supporting women-of-color organizations.

Race Conscious

A foundation's grantmaking focused on programs and services that promote health and improvement of health access and later evolved into advocacy funding "to create systems change benefiting low-income communities of color."

To expand their knowledge on health disparities and find solutions, they hosted multiple regional community forums to hear from community members about the factors that affect health in their communities, one of them being structural racism.

Diversity & Inclusion

Recognizing the lack of knowledge on the community-identified structural racism factor, the foundation's staff and leadership made a stronger commitment to learning more about the topic from knowledgeable leaders in philanthropy such as the Philanthropic Initiative for Racial Equity (PRE) and Race Forward.

Diversity & Inclusion

Structural Racialization

RECOGNIZING A NEED FOR KNOWLEDGE IN ORDER TO TAKE MEANINGFUL ACTION

A foundation's grantmaking focused on programs and services that promote health and improvement of health access and later evolved into advocacy funding "to create systems change benefiting low-income communities of color."

To expand their knowledge on health disparities and find solutions, they hosted multiple regional community forums to hear from community members about the factors that affect health in their communities, one of them being structural racism.

Recognizing their lack of knowledge on structural racism, the foundation's staff and leadership committed to learning more about it from knowledgeable leaders in philanthropy.

They undertook a yearlong internal assessment. As a result of the findings, they reflected their commitment to health equity in the foundation's vision, mission, values, theory of change, and strategies.

They educated board and staff on racial justice through retreats and facilitated discussions about structural racism.

They began collecting demographic data on grantees and itemizing structural racism in annual reports and annual meetings. They visited spaces where their community lived to witness and connect with the issues their grantees were facing.

They learned the importance of having diverse leadership to dismantle the foundation's internal structural racism and diversified their board.

Within two years, 60% of the board's members were either African-American, Latino, or Asian American.

They designed internal assessments of its progress on diversity and equity and accountability mechanisms for their operational practices.

Diversity & Inclusion ➤ Structural Racialization

TREATING GRANTEES AS PARTNERS - INVESTING IN & LEARNING FROM THEM

Since the 60s and 70s, a foundation sought to diversify its board. By 1990 3 of 10 members were people of color. Now, three-quarters of board members are people of color.

In addition, since the 70s the foundation began collecting demographic data through the application process and used it during decision making. Those organizations who did not meet the diversity prerequisites were challenged to developed a plan to address the lack of diversity in the organization's staff and leadership.

The foundation initially hosted regular meetings with a range of grantees which evolved into a day-long convening of all grantees with the foundation's staff and trustees, and converted into what is now a mutual hosting—all in which grantees have the opportunity to provide information about the work being supported by foundation and critique particular strategies and processes. This in particular has helped dismantle assumptions of trustees about the funded organizations' work.

As part of the foundation's strategic-planning process, staff and trustees had analyzed data, surveyed and interviewed grantees, and heard directly from young people of color in communities around the country.

The Foundation created mechanisms for their work that would help the community hold the foundation accountable. With the help of the analysis and information, trustees agreed to change the mission to explicitly state their commitment to "supporting and organizing leadership of young people and communities of color in dismantling structural inequity based on race and class."

The foundation began providing grant support to organizations who were community grounded and engaged in organizing the community and youth for justice on education, immigration, juvenile justice, and LGBTQI rights.

The foundation also financially provided the opportunity for grantees to build their capacity in racial-justice analysis, internal training, and campaign organization.

The foundation became an active racial justice advocate by intentionally engaging with peer foundations and the philanthropic sector to increase support for race-explicit education and youth organizing programs.

Structural Racialization

CHANGE DOESN'T HAPPEN OVERNIGHT, BUT THE IMPACT CAN BE PROFOUND.

A foundation launched a multi-year, multi-site initiative that would include staff interacting with many communities of color living at high levels of poverty. Here are some of the steps they took to ensure their success and meaningful impact.

- Increased staff and leadership diversity.

- Highlighted the importance of listening to the people in the communities and the importance of interacting with the community members in a respectful manner, with cultural competence and appreciation.

- Relocated to be in close proximity to the communities the foundation serves.

- Established a Race, Culture, Power (RCP) Workgroup focused on ensuring the foundation's resources and expertise were focused on racial equity, diversity, and inclusion in grantmaking processes.

- Assessed staff on racial/ethnic perceptions and competencies that uncovered the discomfort among staff in addressing issues of race even though importance of racial equity work was clear.

- Organized meetings and forums with experts and community were organized.

- Allocated funding for the RCP team to increase understanding of structural racism within a community context which, though difficult, resulted in more racial equity systematic work.

- Convened a Race/Ethnicity Advisory Group of experts and practitioners around the country who helped RCP members better understand how inequities are produced, maintained, and changed. Using outside experts gave credibility to internal foundation debates and discussions on racial equity.

- They packaged their learnings into a toolkit for other foundations' use.

- Hosted program officers who could help with the underwriting of "knowledge, policy, and practice to close racial gaps, guided by a racial equity framework."

- Intentionally recruited foundation staff to promote and educate others on the commitment to racial equity and the development of competencies for working with people of different backgrounds (especially races, ethnicities, and cultures).

- Enlisted a consultant to conduct focus groups and interviews of staff around the themes of gender, race/ethnicity, and function to understand the level of competencies on issues of equity, diversity, and inclusion.

- Recommended a set of competencies to the foundation's leadership.

- Institutionalized accountability for equity, tracked benchmarks, and improved issues of disparities beginning "from the inside."

Structural Racialization

CONTINUOUS ATTENTION & GROWTH

Consistent, intentional, and organized activities focused on race are needed to continue to gain knowledge, improve accountability and community partnership, and evaluate and improve racial equity efforts. For example:

A foundation created an Associate Director position responsible for the management of equity, diversity, and inclusion portfolio. The position provided overall guidance and official leadership needed for the foundation's work through trainings, accountability advancement, consultation with and workplans with the different departments, and monitored implementation.

The foundation also established a trained corps of Equity Coaches to keep discussions on race as an integral part of each department's work.

A Policy and Communications Strategic Work Group was formed to conduct racial equity impact analyses to develop policy proposals that will more effectively close racial gaps.

And the foundation became more intentional about tracking their vendors to ensure that racial equity is at all levels of the foundation's business.

Assess, Celebrate Progress, and Continue Moving Forward

Race Neutral → Race Conscious → Diversity & Inclusion → Structural Racialization
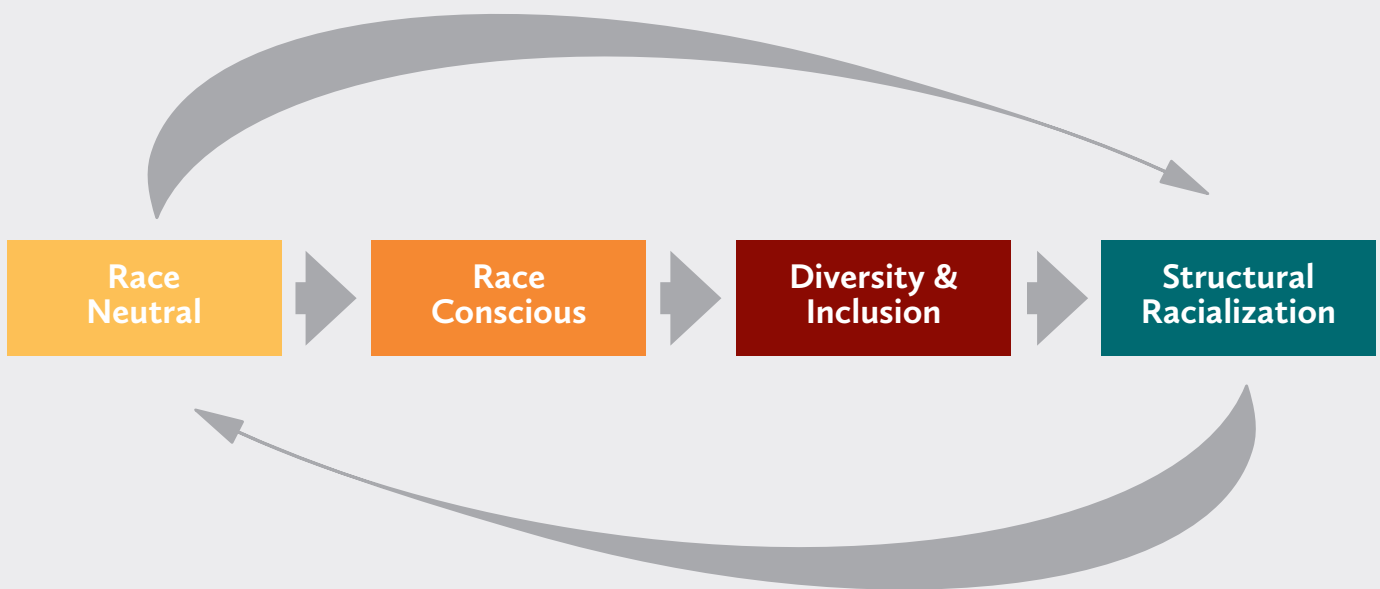
The journey toward responsive, effective and racially equitable philanthropy doesn't have one end point, and the journey will look different for each foundation. As you move closer to your goals in one facet of your work or foundation revisit these tools to strengthen your impact and build capacity toward addressing the intersections of other facets of diversity.

What Will Your Foundation's Story Be?

Race Neutral	➤	Race Conscious	➤	Diversity & Inclusion	➤	Structural Racialization

Sources

We drew from a number of excellent tools for foundations and nonprofits in developing this toolkit. We also have included definitions, data, media clips, and more from a variety of sources. We are grateful for their work and privileged to share them here. We encourage you to use these resources as you continue to increase racial equity personally and through your foundation.

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