

Racial Equity



Advancing Racial Equity in Philanthropy:
**A Scan of Philanthropy-Serving
Organizations**

July 2018

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Acknowledgements

United Philanthropy Forum thanks the 43 regional and national philanthropy-serving organizations (PSOs) that participated in the scan survey and/or scan interviews. We extend special thanks to members of the Forum's

Racial Equity Working Group, who guided the development and execution of the scan and of this report:

- Susan Taylor Batten, ABFE, Co-Chair
- Tamara Copeland, Washington Regional Association of Grantmakers, Co-Chair
- Celeste Amato, Association of Baltimore Area Grantmakers
- Alexis Anderson Reed, Funders' Committee for Civic Participation
- Deb Dubin, Gateway Center for Giving
- Kristina Gray-Akpa, Grantmakers in Health
- Nancy Jamison, San Diego Grantmakers
- Maya Thornell-Sandifor, Philanthropy Northwest
- Lori Villarosa, Philanthropic Initiative for Racial Equity (PRE)

Supporters

United Philanthropy Forum's racial equity scan and report was made possible in part thanks to support from the Ford Foundation and W.K. Kellogg Foundation.

About the Forum

United Philanthropy Forum leads, strengthens and informs a national network of nearly 75 regional and national philanthropy-serving organizations (PSOs) that advance philanthropy's impact for the common good. We envision a courageous philanthropic sector that catalyzes a just and equitable society where all can participate and prosper.

Forum members represent more than 7,000 philanthropic organizations, making us the largest network serving philanthropy in America. The Forum is creating a new kind of philanthropic network that brings together regional PSOs' deep regional roots and connections with national PSOs' deep content knowledge and reach. Given our network's scale and scope, we can lead change and increase impact in philanthropy in a deeper and broader way than any other organization.

To learn more about Forum membership please visit: www.unitedphilforum.org/join.

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This report can be downloaded from the Forum’s website at

www.unitedphilforum.org/racialequityscan

Introduction

United Philanthropy Forum envisions a courageous philanthropic sector that catalyzes a just and equitable society where all can participate and prosper. It is not possible for us to achieve this vision without addressing racial equity, which is why a key strategic priority for the Forum is to advance racial equity, diversity and inclusion in philanthropy.

The Forum strives to be a leading connector, convener and collaborative partner for all regional and national philanthropy-serving organizations (PSOs) on racial equity, diversity and inclusion. Our network includes nearly 75 PSO members—including regional philanthropy associations and national affinity groups, networks and associations of funders. We are working to help PSOs bring a racial equity lens to all aspects of their work, including their internal operations, external programming, and leadership work in the field, and to catalyze and guide greater PSO collaboration in this work. We believe this has the potential to shift the thinking and practice of many of the more than 7,000 foundations that belong to these PSOs, leading to deeper change to the field.

To help inform and guide our work in this critical area, the Forum conducted a scan of regional and national PSOs in February through May 2018, to get a comprehensive understanding of PSOs' current work and future needs to advance racial equity in philanthropy. The scan involved both a survey that asked about PSOs' current work, future needs and greatest challenges in advancing racial equity, plus in-depth interviews to discuss what it takes to do this work effectively and to identify their key challenges, barriers and opportunities for addressing systemic inequities.

For the purposes of this scan, we define racial equity as dismantling structural racism and reducing racial disparities with an intent to bring about justice for all. In addressing structural racism, the ultimate goal is to create circumstances in which race is not a predictor of advantage or disadvantage.

Per the Aspen Institute Roundtable on Community Change, the term structural racism refers to “a system in which public policies, institutional practices, cultural representations and other norms work in various, often reinforcing ways to perpetuate racial group inequity.”

I'd like to thank the 43 regional and national PSOs who took the time to participate in the scan survey and/or the scan interviews. I'd also like to thank David Maurrasse from Marga Incorporated, who led the scan research, and the members of the Forum's Racial Equity Working Group (they are listed on the previous page), who guided the development and execution of the scan and this report. In particular, I'd like to thank the Co-Chairs of our Racial Equity Working Group: Susan Batten, President & CEO of ABFE, and Tamara Copeland, President & CEO of the Washington Regional Association of Grantmakers.

The results of the scan have already informed the Forum's future plans for leading, informing and supporting our members in advancing racial equity in philanthropy. We hope the report will also be helpful to PSOs and funders who are committed to dismantling structural racism and reducing racial disparities. We have much work to do, and we must work together.

Regards,



David Biemesderfer
President & CEO
United Philanthropy Forum

Key Findings

Biggest Gaps & Needs for PSOs to Advance Racial Equity

PSOs identified the following as being the greatest needs they have, and gaps they see, for helping them do more to advance racial equity in philanthropy:

"There are vibes on the coasts—but there is a need for resources that understand a conservative Midwestern context. The foundations in our state will trend toward neutral to conservative—so resources have to be useful in this climate."

- **Access to guiding frameworks, professional development, tools and training** on both internal practices as well as working with members on racial equity. This need was identified by PSOs that self-reported as "beginning" the work as well as those who have been at this work for a while.
- **Access to additional financial resources to support racial equity work.** Many PSOs discussed the need for funding to either contract with skilled consultants and/or training for increased staff capacity.
- **Need for peer learning.** The interest in peer exchange is high within the Forum's membership.
- **Need for case studies.** Nearly all respondents alluded to a request for case studies or conversations with experienced funders, particularly on how to "influence up" to the level of trustees and president.
- **Engaging board members.** This issue is twofold: PSO staff dealing with their own boards as well as helping their members to engage their foundation boards.
- **A stronger power analysis for the sector, especially around foundation boards and investments.** There is a belief that the sector could benefit from more honesty around the origins of wealth in philanthropy, as well as more timely and accurate data about funding work that is led by and benefits people of color.

What Facilitates Progress to Advance Racial Equity

PSOs identified the following to be the most important factors that need to be in place to facilitate greater progress on advancing racial equity in philanthropy:

- **A shared language.** Building a shared language and point of view is critical to getting staff, board and members on the same page relative to racial equity.
- **A focus on structural racism.** Starting the work on structural racism helps move reluctant colleagues on the "margins" of conversations on race who may be tentative about their own personal biases.
- **Meeting people where they are.** It is not possible to "rush" PSOs' staff, boards or members to a place where they are not; but rather, to meet them where there are.

- **Connecting racial equity to members' priorities.** Along the lines of meeting people where they are, respondents realize that racial equity should be connected to members' priorities, whether that is members' funding issues (health, environment, homelessness, etc.) or geographic regions (data on disparities in the particular PSO's region) in order to make the issue as relevant as possible to their work.

Additional Insights

"There is resistance from funders (PSO members) who think the idea of racial equity is great, but they don't think it will work with their boards. Getting past the resistance and getting funders to see tangible steps to take are challenges."

- **PSOs are eager to continue or start the work.** Every PSO expressed a willingness to increase its capacity to address systemic racism and is proactive in laying out specific goals.
- **Hesitancy among some foundations.** PSOs report that less racially diverse foundations are a bit more hesitant to engage in racial equity work (difficulty with the board, sensitivity with the terminology, struggle with the starting point, etc.).
- **The "committed cluster" phenomenon.** Even among seasoned practitioners of racial equity programming, the greatest dedication rests with a highly committed cluster within a PSOs' membership. A key challenge is to move past this cluster and bring along more members to engage in racial equity work.

Racial Equity Profile: ABFE



ABFE is a membership-based philanthropic organization that advocates for responsive and transformative investments in Black communities. Its mission is to promote effective and responsive philanthropy in Black communities. Partnering with foundations, nonprofits and individuals, ABFE provides its members with professional development and technical assistance resources that further the philanthropic sector's connection and responsiveness to issues of equality, diversity and inclusion.

Established in 1971 as the Association of Black Foundation Executives, the all-volunteer organization was credited with many of philanthropy's early gains in diversity. It since has evolved into a fully staffed, influential network. In 2013, the organization shed its descriptor and adopted the simpler ABFE (ab-fee) to better reflect its broadening membership. ABFE's key areas of work are in advocacy; knowledge, training & technical assistance; networking and convening; and professional and leadership development.

To achieve its mission, ABFE is focused on four primary outcomes:

- The philanthropic sector has an increased understanding of the complex issues facing Black communities and they are better armed with the knowledge, leadership skills and decision-making power to serve as strong advocates for Black communities in the philanthropic sector.
- ABFE and its members are key partners and members of philanthropic efforts that strengthen Black communities.
- The philanthropic sector is better linked to one another to develop joint or coordinated strategies that leverage resources for the greatest social impact in Black communities.
- The philanthropic sector invests new and more effective resources targeted to priorities issues/policies that impact Black people and communities.

Learn more at www.abfe.org.

Forum's Plan of Action to Advance Racial Equity

The results of the racial equity scan have helped shape and inform United Philanthropy Forum's plans and priorities for advancing racial equity in philanthropy, as we strive to be a leading connector, convener and collaborative partner for all regional and national PSOs on racial equity, diversity and inclusion. The Forum plans to act on the scan results in several key ways to address the needs, interest, gaps and challenges identified by PSOs, including the following immediate action items:

Provide Effective and Relevant Racial Equity Education and Other Programming/Resources to Our PSO Members

- **Share racial equity resources identified in the scan.** Scan respondents identified numerous consultants, speakers, and facilitators on racial equity who they have used and would recommend to others. The Forum will provide a compilation of all of these resources to Forum members and other survey respondents, to help PSOs develop racial equity programming internally and for their members.
- **Continue to emphasize racial equity at Forum's annual conferences.** The Forum has established some important groundwork to enable the expansion of racial equity work among PSOs. The Forum's annual conferences provide opportunities to connect our members to resources in the field, engage members in peer learning, provide leadership for the field on the significance of racial equity to the work of PSOs, and update members on the various ways in which the Forum is working on these issues. The Forum plans to continue a strong focus on racial equity in the content of our conferences moving forward, introducing our network to leading thinkers and practitioners and offering practical skill-building sessions.
- **Provide virtual opportunities for racial equity programming and education.** The Forum will continue to provide virtual opportunities for our members to learn and share around advancing their racial equity work, through periodic webinars and through our partnership with the Washington Regional Association of Grantmakers to make available and promote videos, and related discussion guides, of key thought leaders on racial equity who are presenters at WRAG's *Putting Racism on the Table* series.

Provide Space for Our Members to Connect on Racial Equity Issues

- **Establish peer learning spaces for members.** To address the need for peer learning identified in the scan, the Forum plans to start two Peer Communities on Advancing Racial Equity, Diversity and Inclusion. One group will be for people working at organizations that are further along in their racial equity journey, and the other group will be for people working at organizations that are newer to the work. These two new Peer Communities, like the Forum's other Peer Communities, will offer a listserv, regular webinar learning sessions each year, and an in-person meeting at the Forum's annual conference. The groups will be guided by an expert facilitator(s).
- **Provide opportunities for Forum members deeply engaged in racial equity work to showcase their efforts.** As so many scan respondents told us that they want to learn from their PSO peers, the Forum will use the annual conference, webinars, publications, online case studies, and other formats to expose the broader membership to the racial equity pursuits of select members.
- **Develop case studies.** Using the findings from this scan as a starting point, the Forum will further explore how to develop case studies of PSOs' racial equity work.

Build the Capacity of Our Members to Provide Racial Equity Education/Resources to Their Members

- **Develop a racial equity capacity assessment for PSOs.** The Forum plans to develop a racial equity capacity assessment that will allow PSOs to assess their capacity for advancing racial equity, track their progress, and compare their capacity to their peers, working in partnership with CHANGE Philanthropy. The assessment will also help guide the Forum's racial equity education work with our members, as we will cover different aspects of the assessment in our programming each year.
- **Seek funding for a racial equity mini-grant program for PSOs:** To help our members overcome the significant financial barriers to engaging in racial equity work that were identified in the scan, the Forum plans to seek funding that would allow us to create a mini-grant program to provide Forum members with small grants to cover all or part of the costs of one of a trainer, speaker or facilitator to work with a PSO's staff, board and/or members on key issues related to racial equity. This would help catalyze new and deeper work on racial equity more broadly among the Forum's membership.
- **Build capacity for PSOs to engage their boards.** The Forum will further explore how to provide programming/training for PSOs on how to talk to their boards about racial equity, working with partners in the field.

- **Gather and disseminate diversity data about our network to hold our network accountable.** In 2017, the Forum conducted our first-ever compensation, benefits and key metrics survey of regional and national PSOs, which included the collection of racial/ethnic data for more than 50 PSO staffs and boards. The Forum issued a public report and communications focused on these data. The Forum plans to track and report on these data each year to identify trends, hold our network accountable in the area of staff and board diversity, and help inform the work of PSOs in their efforts to improve staff and board diversity.

Strengthen Forum's Capacity to Advance Racial Equity in Philanthropy

- **Develop tools and guidelines for embedding racial equity in all Forum programming.** The Forum will develop tools, guidelines and training to embed racial equity work into all of our programming. We envision the creation of one or two tools, along with some general guidelines, that can be used as a frame for developing content for the Forum's general webinars, Peer Community webinars and convenings, conference sessions and all other Forum programming. We will also provide annual training for Forum staff and for our Peer Community Co-Chairs on how to use the tools and guidelines when developing program content.
- **Bring a racial equity lens to Forum's public policy work.** The Forum plans to grow our efforts to bring a racial equity lens to all of our policy and advocacy work. As part of this work, we will seek outside expertise to guide us in including a racial equity impact analysis in all of our policy positions, which will not only help the Forum to advance racial equity in our own work but also serve as a model for our members.
- **Build Forum's internal capacity around racial equity, diversity and inclusion.** For the past two years the Forum has taken important steps to strengthen our internal capacity to address issues of racial equity, diversity and inclusion, and those efforts will continue every year—as this work is now embedded in our organization's vision, mission and values. The Forum held our first board training on racial equity in 2016 and first staff training on racial equity in 2017. We plan to continue to provide racial equity training for our staff and board on an annual basis. The Forum has taken steps over the past two years to bring a racial equity lens to our HR procedures, and over the next three years we plan to expand this work by engaging with consultants to help us bring a racial equity lens to all of our internal policies and procedures.
- **Continue to strengthen the Forum's leadership on racial equity.** In 2017 the Forum formed the Racial Equity Working Group to guide the development of this scan and advise how the Forum should continue playing a leading role in prioritizing racial equity among PSOs. The Forum's Board of Directors and Racial Equity Working Group will continue to guide the Forum's strategies and leadership on advancing racial equity in philanthropy, working closely with key partner organizations in the field.

Racial Equity Profile: Asian Americans/Pacific Islanders in Philanthropy



Asian Americans/Pacific Islanders in Philanthropy (AAPIP) is a national membership organization dedicated to expanding and mobilizing philanthropic and community resources for underserved AAPI communities to build a more just and equitable society.

AAPIP envisions a just and equitable democracy with the full civic and economic participation of Asian American/Pacific Islanders. AAPIP believes that:

- Democracy thrives when we leverage individual action for collective good.
- Lasting change is achieved by strengthening and empowering those who are most impacted.
- Philanthropy is most effective when it is equitable and inclusive – driven by the assets and leadership of our diverse communities.

AAPIP's members include staff and trustees of foundations and other grantmaking entities as well as individual donors and philanthropy-serving professionals. In addition, AAPIP supports 10 regional chapters around the country that are centers for place-based advocacy, information sharing, leadership development and network building around AAPI issues and philanthropy.

AAPIP's programs include a range of convening, research and advocacy, community philanthropy/Giving Circles and other incubation projects. These programs are designed to engage AAPI communities and philanthropy to address unmet needs, serve as a resource for and about AAPI communities, support informed, grassroots giving within and to AAPI communities and explore new ideas and approaches for social justice philanthropy.

Learn more at www.aapip.org

Racial Equity Scan Detailed Results

This scan reflects the input of 43 regional and national philanthropy-serving organization (PSOs)—25 regional PSOs and 18 national PSOs—that participated in a scan survey and/or interviews between February and May 2018. The Forum sent the scan survey to 64 its 69 regional and national PSO members and an additional 20 non-member national PSOs. The Forum excluded from the survey six national PSOs doing deep work on racial equity that is core to their mission (AAPIP, ABFE, CHANGE Philanthropy, Hispanics in Philanthropy, Native Americans in Philanthropy and Philanthropic Initiative for Racial Equity) but included them in the interviews. These six PSOs are highlighted throughout the report.

The Forum received survey responses from 33 of its 64 member PSOs invited to complete the survey, for a 52% response rate from its members, and from four of the 20 non-members, for a 20% response rate among non-members (the overall response rate for members and non-members combined was 44%). All but one of the survey respondents indicated an interest in being interviewed as a follow-up to the survey—demonstrating a strong interest among PSOs in talking about this work.

The racial equity scan survey included questions about PSOs' current work on racial equity, including: programming and tools that they have developed; training underway; learning and networking groups; and strategy and working groups. The survey also asked PSOs about their future needs and gaps in this work and recommendations on speakers, trainers and facilitators they have used for this work (see survey instrument in Appendix A).

Where PSOs Are On Their Racial Equity Journey

The scan's responses suggest that Forum members are addressing racial equity at varying levels.

43% of survey respondents define their racial equity work as "just beginning"

51% of survey respondents have been engaged in racial equity work for a longer period of time but don't consider their efforts as "advanced"

- 43% of respondents define their work as "just beginning." These groups have had experience with some trainings and/or hosted conversations with their membership on these issues.
- Just over half of the respondents (51%) have been engaged in racial equity work for a longer period of time. They don't necessarily describe their efforts as "advanced" in comparison to those who self-reported as "beginners," but one can see a deeper set of activities and programming opportunities, board engagement and plans for next steps.
- Just two respondents (6%) reported that they had not started any work on these issues but were interested in doing so.

At least some of the PSOs who did not participate in the scan indicated that they did not respond because they are not currently doing any racial equity work, but expressed an interest in seeing the results of the scan.

35% of scan respondents describe their work in a DEI (diversity, equity, inclusion) frame

43% of scan respondents describe their work in a racial equity frame

There is a critical note about terminology, analytic frameworks and strategies as described by respondents to both the survey and phone interviews—the usage of a “DEI” (diversity, equity and inclusion) language and frame versus “racial equity.” While the survey specifically asked Forum members to share their work, interests and resources around racial equity;¹ respondents shared work across a broad spectrum of diversity and inclusion work, implicit bias and racial equity. A closer look at the respondent surveys suggests that roughly:

- 35% of scan respondents define their work as “diversity, equity and inclusion” (DEI). However, more than half in this group are doing both basic DEI work and carrying out programming on racial equity and structural racism and/or moving in that direction. One respondent refers to their work as DREI; diversity, racial equity and inclusion;
- 43% of scan respondents describe their new and/or ongoing interest and activities as racial equity, however a few in this group (3) are carrying out diversity work.²

There are a number of reasons why work is framed in certain ways. Some respondents who are using the DEI language discussed it as a strategy to enable them to move the work forward. Others explained the connection they see between doing diversity and inclusion work to “get to racial equity.” Yet others may be conflating “internal diversity work” versus “external racial equity work” that engages members. Some see racial equity as narrow and not inclusive enough. One respondent said, “Our scope is DEI—bigger than racial equity... The people in our communities should be able to see themselves in the work of our foundations.” While there are differing definitions and frameworks among respondents, these PSOs essentially want similar types of assistance toward a racial equity or DEI agenda. Nevertheless, the Forum should keep issues of terminology and understanding around these concepts on the radar.

One other important consideration is the range of types of PSOs engaged in this work and the communities served by this work. Some respondents are based in geographical areas with substantial resources and expertise on racial equity in their communities. Others are located in regions that are largely rural, not especially diverse in terms of race and ethnicity, and where funders are not particularly receptive to discussions on racial equity—much less to strategies to embed a commitment to these concepts in their work. Some PSO respondents have significant budgets with numerous staff, while others are small, even without a single full-time staff person. The memberships of these various PSOs are also fairly different. In some instances, members represent larger foundations with a predisposition to these issues.

¹ Defined in the survey template as “dismantling structural racism and reducing racial disparities with an intent to bring justice for all...In addressing structural racism, the ultimate goal is to create circumstances in which race is not a predictor of advantage or disadvantage....Structural racism is a system of public policies, institutional practices, cultural representations and other norms that work in various, often reinforcing ways to perpetuate racial group inequity.”

² If a respondent described their work as “equity” across a number of issues—gender, race, orientation, etc., we describe it as DEI for these purposes. The remaining PSOs didn’t refer to their work in a specific way. Future surveys should more explicitly ask how members define their racial equity work and if it falls into a larger DEI frame.

In other PSOs, their members are largely small family foundations and corporate philanthropies with overwhelmingly white staff.

Key themes and highlights of the research should be viewed against this backdrop. They demonstrate respondents' needs and their thinking on the Forum's direction around racial equity.

Racial Equity Profile: Hispanics in Philanthropy



Hispanics in Philanthropy (HIP)'s mission is to strengthen Latino leadership, equity, and voice. For more than 30 years, the HIP network has been an advocate for Latino communities, partnering with foundations, corporations, and individuals to foster a more diverse and inclusive philanthropic field, and to channel more funding to Latino communities.

HIP's key areas of work include:

- **Advocating for increased philanthropic investment in Latino communities.** Since 2000, HIP has raised over \$50 million to support more than 600 innovative Latino nonprofits in the U.S. and throughout Latin America. In addition, its platform [HIPGive.org](https://www.hipgive.org) is the first bilingual crowdfunding platform geared toward strengthening grassroots Latino nonprofits.
- **Educating funders to respond to high-priority Latino issues.** HIP raises the voice of Latino communities through strategic communications campaigns; releases data-rich reports on how funders can best support key issues; and holds an annual conference to bring together and foster dialogue with our network of transnational funders.
- **Advancing Latino leadership in the philanthropic field.** HIP supports emerging and senior leaders in philanthropy so that they can individually and collectively make changes within the field and their own institutions through training, professional development, and leadership circles.

Learn more at www.hiponline.org.

Why PSOs Are Engaged in Racial Equity Work

When describing in interviews the catalyst for their work on dismantling racism and addressing racial equity, a few organizations mentioned recent uprisings and the aftermath of shootings of unarmed Black men and boys, specifically the deaths of Michael Brown and Trayvon Martin. One PSO indicated that it, “*exposed them to a broader world [where] they recognized they are uniquely situated to convene funders around justice and equity.*” Numerous respondents referenced the 2016 election as an important driver to expand an emphasis on racial equity. Some other PSOs indicated how expanded discussions in the Forum network on racial equity and DEI incentivized growth in their own work on these issues.

“(Racial equity) is a buzzword in philanthropy and is being used a lot, so it’s important to have an understanding.”

In some instances, a PSO’s foundation members are the key drivers of encouraging a PSO’s development or expansion of its work on racial equity, but in most cases it was initiated by PSO staff. On some occasions, PSOs were able to maintain a commitment from one CEO to the next. This continuation suggests that some PSOs have been able to embed a commitment to racial equity beyond a single leader. A few others have been doing the work since the 1990s and were involved in the field’s earlier efforts like the Diversity in Philanthropy Project (the precursor to the [D5 Coalition](#)). Some of those newer to the work cite “following the trend” as the reason why they’re focusing on effectiveness and equity. “*It is a buzzword in philanthropy and is being used a lot, so it’s important to have an understanding,*” said one respondent.

PSOs’ Current Racial Equity Work & What Facilitates Progress

The Forum membership holds an abundance of information on available tools, resources and materials to advance racial equity. The survey identified over 170 speakers, facilitators, trainers and other resources that can help PSOs help their members make progress on these issues (the Forum has compiled and shared these resources with its membership).

“People were using language differently. They were conflating prejudice and discrimination and racism.”

Many resources currently being utilized by various PSOs have come from other PSOs further along in their racial equity work. Many respondents shared information about their working partnership with groups such as the Philanthropic Initiative for Racial Equity (PRE), ABFE and the Washington Regional Association of Grantmakers. The interest in peer exchange is high within the Forum’s membership and will likely grow as more PSOs learn about promising work happening around the country.

The survey and accompanying interviews provided additional insights about what work is underway among PSOs to advance racial equity and strategies to move forward, particularly in the beginning stages.

Regardless of the starting point, there are many similar themes among PSOs' respective initiatives. The most common racial equity-focused initiatives and activities in which PSOs are engaged are:

38% of survey respondents have board committees, task forces or advisory groups on racial equity or DEI

32% of survey respondents have developed strategies or strategic frameworks to guide their racial equity work

30% of survey respondents operate racial equity learning and networking groups

- **Racial equity-focused programming.** Programming for funders seems to be a key entry point for many PSOs in starting to address racial equity with their members and constituents. Nearly all of the scan survey respondents identified programming they have presented recently on issues related to racial equity or broader DEI issues. This programming takes many forms. It includes speakers on racial equity as part of a PSO's conference; single programs or a series of programs that feature speakers on racial equity of DEI topics; workshops and trainings to dive deeper into racial equity issues; webinars on various topics; and more. A few PSOs have held equity summits.
- **Peer learning groups.** Nearly one-third (30%) of the survey respondents operate racial equity learning and networking groups that offer opportunities for their members or other constituents to connect, share and learn with their colleagues and peers on racial equity issues on an ongoing basis. Just 36% of these PSOs focus specifically on racial equity; another 36% focus on diversity, equity and inclusion; and 28% of these groups are member networks for grantmakers of color.
- **Expanding PSO board involvement.** 38% of scan survey respondents have developed a board committee, task force, working group or advisory group to guide the PSO's racial equity or broader DEI work. Of these PSO board groups, 43% are focused specifically on racial equity, another 43% are addressing DEI, and 14% are focused on just equity (not specifically racial equity).
- **Establishing strategic goals and frameworks.** Nearly one-third (32%) of scan survey respondents identified specific strategies or strategic frameworks that their PSO has developed and is using to guide its work on racial equity. A number of other PSOs noted that they are working to develop such strategies and frameworks.

"There has not been finger-pointing. It is not about individuals but a system. Nobody wants to be blamed. We never start with the individual – it's never about personal animus, but what are the structures and systems that have disadvantaged one group and advantaged others."

PSOs identified the following factors as being the most critical to facilitate progress in advancing racial equity with their members or constituents:

1. **Building a shared language and point of view** is critical in getting a PSO's staff, board and members on the same page relative to racial equity.
2. **Starting the work with structural racism** helps move reluctant colleagues on the "margins" of conversations on race who may be tentative about their own personal biases.
3. **It is not possible to "rush" staff, board or PSO members to a place where they are not;** but rather, to meet them where there are. Consistent conversations, ongoing "level-setting" to help build competency, and making ties between racial equity and an area of grantmaking and/or personal work is helpful over time.
4. Along the lines of starting where people are, respondents realize that **racial equity should be made directly relevant to members' priorities**, whether they are funding issues (health, environment, homelessness, etc.) or geographic regions (data on disparities in a particular PSO's region).
5. **PSOs have to be prepared for facilitating difficult conversations.** Even when trainings are conducted, PSOs that do not understand or have any basic knowledge of racial equity can face tough conversations, particularly when there is no unified definition of racial equity and words like "white privilege" or "structural racism" are uncomfortable in the often "polite" environment of philanthropy.

Some useful quotes from PSOs on what it takes to engage members around racial equity:

"People were using language differently. They were conflating prejudice and discrimination and racism."

"Having all of the staff team go through racial equity training helped people use the same language (across all departments). People have the same vision for what they want to see in practice."

"There has not been finger-pointing. It is not about individuals but a system. Nobody wants to be blamed. We never start with the individual – it's never about personal animus, but what are the structures and systems that have disadvantaged one group and advantaged others."

Racial Equity Profile: CHANGE Philanthropy



CHANGE Philanthropy holds a vision of transforming and challenging philanthropic culture to advance equity, benefit all communities, and ignite positive social change. CHANGE Philanthropy is a coalition of philanthropic networks working together to strengthen bridges across funders and communities. It is transforming philanthropy from within by building knowledge, fostering diversity, and creating connections. CHANGE Philanthropy advances philanthropic equity, the investment of social and financial resources in policies, practices, and actions that produce equitable access, power, and outcomes for all communities.

The CHANGE Philanthropy coalition consists of 10 partner organizations: [Asian Americans/Pacific Islanders in Philanthropy](#), [ABFE A Philanthropic Partnership for Black Communities](#), [Emerging Practitioners in Philanthropy](#), [Fundors for LGBTQ Issues](#), [Hispanics in Philanthropy](#), [Native Americans in Philanthropy](#), [Women's Funding Network](#), [National Committee for Responsive Philanthropy](#), [Neighborhood Funders Group](#) and the [Philanthropic Initiative for Racial Equity](#). CHANGE Philanthropy's collective reach of a national network of more than 2,500 active members and more than 20,000 philanthropic, nonprofit and corporate professionals.

What makes CHANGE Philanthropy unique is its advocacy of community priorities of its partners with an intersectional approach. Each partner organization organizes resources and builds connections and represent the communities that they promote. That lived experience shapes our work every day, giving us a connection to the strengths and assets of different communities as well as to their needs. Coming together, its seven core partners are working to integrate diversity, inclusion, and social justice into philanthropic practice, transforming the sector's culture to be one that embraces equity. It also provides tools, resources, and connections to the greater philanthropic community, as well as leveraging the knowledge and insight of its wide network within this community. Together, CHANGE Philanthropy is working to raise the level of dialog among funders so that philanthropic dollars are dispersed through equitable practices that take the true concerns of all communities to heart.

CHANGE Philanthropy believes it can accomplish these bold goals through collaboration, partnership and through leveraging our power, networks and resources. With that in mind, it has five major tactical approaches:

- **Celebrate Impact:** Recognize foundations who've made a strong commitment to advance equity across all communities
- **Build Knowledge:** Offer a curated resource hub of data, best practices, events and tools – all with an equity lens
- **Expand Leadership:** Deepen relationships within the leadership pipeline to authentically engage diverse and experienced candidates
- **Create Connections:** Foster collaborative spaces to strengthen bridges across the sector to support partnerships in shared practices and strategies for impact
- **Cultivate Partnerships:** Initiate and coordinate programs to promote effective intersectional approaches to ignite positive social change

Learn more at www.changephilanthropy.org

www.unite4equity.org

PSOs' Biggest Gaps and Needs to Advance Racial Equity

While the responses to the survey indicate that many PSOs are looking to advance their racial equity work, they identified several gaps in capacity, knowledge and resources that stand in the way of scaling up racial equity initiatives. The top four needs/gaps identified by survey respondents were as follows:

1. **Access to guiding frameworks, professional development, tools and training on both improving internal practices as well as working with members on racial equity.** These issues were cited as both “the greatest need” as well as the “biggest gaps to fill.” Interest in training, professional development supports and implementation frameworks were of interest to those who self-reported as “beginning” their racial equity work (how to get the work off the ground) as well as those who have been at this work for a while (how to move strategies to go deeper). Respondents discussed the need for various forms of support including peer exchanges; printed “playbooks”; comprehensive “curriculum”; as well as access to a database of resources (so colleagues don’t have to “start from scratch”). One respondent also pointed out the need for racial equity training, frameworks and professional development for “grantmakers as well as grantseekers.”

While some respondents recognized that many such resources already exist, there was a fairly consistent theme of the need for customized support that fits an individual PSO’s size, region, etc. In addition, many regional PSOs raised the challenges that come with engaging rural communities and funders in this work, and needing resources tailored to those specific challenges.

Some relevant quotes from interviews:

“(Foundation) members are asking, ‘What do I do?’ But many need introductory learning. This is an iterative process for most foundations—small and incremental steps.”

“Most leave a training and then they want a map or a tool to help guide them.”

“For (foundation) members who are just starting to do the work, they want to know where to start. It would be nice to know who are good consultants—particularly consultants who fit specific members’ needs.”

“There are vibes on the coasts—there is a need for resources that understand a conservative Midwestern context. The foundations in their state will trend toward neutral to conservative – so resources have to be useful in this climate.”

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- 2. The need for additional financial resources to support racial equity work.** Many respondents discussed the need for funding to either contract with skilled consultants and/or trainers or to increase staff capacity. Again, this was a consistent theme across PSOs regardless of where they are on the "start-up"/implementation spectrum and is a particular burden for smaller regional and national PSOs. Many respondents referred to the need for a budget to support the cost of consultants, speakers and training. As one respondent indicated:

"We are trying to build capacity; but I am doing this at my own expense. Unless we can get resources to build awareness and move programs, I don't see us doing a whole lot. We want to connect with national groups. But I am not sure we have the resources."
- 3. Engaging board members.** It appears this issue is twofold: PSO staff dealing with their own boards as well as how to help their foundation members engage their boards. Many discussed the need for assessment tools to evaluate where boards are as well as strategies to educate boards on the value of racial equity work. This support may also include strategies for staff responding to difficult statements and/or comments by PSO board members (as well as members generally) when pursuing racial equity work. This issue points to the extent to which PSO board members are challenged within their own institutions, and with their own boards, to move racial equity forward. As one respondent noted:

"There is resistance from funders (PSO members) who think the idea of racial equity is great, but they don't think it will work with their boards. Getting past the resistance and getting funders to see tangible steps to take are challenges. They are stymied by the fact that funders are spinning their wheels and having difficulty figuring out what to do...it is clear there are many different definitions of equity. There are watered-down versions of equity. People have to think more deeply about what equity means (beyond just serving vulnerable communities)."
- 4. The sector needs a stronger power analysis, especially around foundation boards and investments.** There is a belief among many scan respondents that the sector could benefit from more honesty around the origins of wealth in philanthropy. Along with this is a need for more timely and accurate data about funding work that is led by and benefits people of color.
- 5. Building support among members for racial equity work.** The overall trend is that PSOs suggest that their members are eager to continue and/or start racial equity work. The biggest differentiation is that members representing larger foundations and progressive institutions are ready to move forward, but some smaller and less racially diverse foundations (such as many family foundations) are a little more hesitant. While there may not be active opposition among members, some PSOs struggle with where to start the work, are made uncomfortable with terminology, or are having difficulty persuading their boards or more conservative constituents.

In some cases, a much smaller group continues to participate in a PSO's racial equity programming, leaving some wondering how best to reach the next tier of their members—to get beyond the "choir."

Another important observation is that, even among some of the more seasoned practitioners of racial equity programming among PSOs, the greatest dedication among their foundation members rests with a highly committed cluster. In some instances, this cluster could represent half of a PSO's membership. But in some cases, a much smaller group continues to participate in a PSO's racial equity programming, leaving some wondering how best to reach the next tier of their members—to get beyond the "choir."

Nearly all PSO respondents—particularly those not yet actively engaged in racial equity work—alluded to a request for case studies of institutions or a conversation with funders who have successfully engaged in racial equity work, particularly on "*influencing up' to the level of trustees and presidents.*"

Racial Equity Profile: Native Americans in Philanthropy



The mission of Native Americans in Philanthropy (NAP) is to promote equitable and effective philanthropy in Native communities.

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Foundation funding to Native American issues and communities has stagnated at 0.5% or less of annual giving, despite the resilience, leadership and innovation of Native Americans in the face of systemic barriers stemming from centuries of colonialism and genocide.

NAP's vision is for all Native communities to be restored to full health and sustainability through responsibility. To accomplish this, NAP is committed to the following goals:

- Increase philanthropic investment in Native communities to strengthen and expand community-based solutions.
- Strengthen supports for Native, philanthropic and nonprofit leaders to further diversify the sector.
- Improve the availability of regular, reliable data and Indigenous-led research on philanthropic giving to Native communities.

Over several decades, NAP has become a powerful and continuously growing network of Native and non-Native nonprofits, tribal communities, foundations and community leaders committed to engaging, learning and sharing resources and best practices grounded in Native values and traditions. NAP has been a consistent advocate for the protection of tribal sovereignty, land and water rights, women's rights, Native youth leadership, and Native intergenerational healing. Through partnerships and cross-movement advocacy efforts, NAP works to elevate key issues and to address the pressing needs of our communities with culturally comprehensive approaches.

Learn more at www.nativephilanthropy.org.

Additional Insights

Every PSO that was interviewed and surveyed wishes to increase its capacity to address systemic racism and is proactive in laying out specific goals to achieve this. These goals vary substantially across the many organizations based on where they are in their racial equity journey. But even among those who have very little to report on past efforts, respondents are quite thoughtful about future efforts they wish to pursue. Some have not done more because of lack of interest among members. But a few of those who have not done much to date would do more with greater resources.

Every PSO that was interviewed and surveyed wishes to increase its capacity to address systemic racism and is proactive in laying out specific goals to achieve this.

Many want to focus on racial equity internally, with an understanding that this work has to start at home. If they are going to lead on racial equity among members, they have to demonstrate their commitment internally. For PSOs themselves, there are considerations around staffing, boards, leadership, vendors, and beyond. Internal racial equity programming can include hosting workshops, organizing webinars, using discussion guides, and conducting board trainings.

In the long run, there is a strong desire to see greater representation of people of color in the sector—especially at CEO and board levels. Numerous PSOs cited as a long-term goal that the organization and membership body will have more diversity at the table. As one respondent envisioned, “*CEOs of color on panels discussing how their foundations have overhauled their focus on racial equity.*” The Forum’s member organizations want to see the face of philanthropy change dramatically.

In the shorter term, many respondents are going to place a greater emphasis on racial equity or on racial equity within the wider framework of DEI. Some will continue education series, while others will develop publications, working groups, summits, and other programs.

Racial Equity Profile: Philanthropic Initiative for Racial Equity



The goal of the Philanthropic Initiative for Racial Equity (PRE) is to increase the amount and effectiveness of resources aimed at combating institutional and structural racism in communities through capacity building, education, and convening of grantmakers and grantseekers.

Since its inception in January 2003, PRE has directly engaged hundreds of foundation representatives (including program staff, management, board members and individual donors) in discussions of racial equity and, in particular, how they can advance the mission of achieving racial equity through their own philanthropic institutions. PRE has also worked extensively with regional, issue-based and identity-based PSOs for the past 15 years, ranging from workshops at conferences to deeper partnerships, advising and technical assistance. PRE both sparked many PSOs' early efforts in addressing racial equity as well as being available to more advanced networks seeking to take their members to a deeper level.

PRE recognizes that there are a broad range of effective programs and practices to tackle inequities and advance racial justice. Changing demographics and increased national and international awareness have created a much greater level of sophistication among many foundation leaders and PSOs. However, these advances also bring increased complexity, backlash and often an even deeper level of need for understanding and skills building.

Whether we are talking about ways to engage communities or ways to engage foundation staff and boards, PRE understands the importance of meeting people where they are on their own continua of learning and comfort level in addressing what can often be difficult and controversial issues. It also recognizes that peer learning and support can be critical when facing these challenges, and works to provide the space and tools that will allow this to happen.

PRE seeks to build both financial and programmatic resources to combat structural racism through the following strategies:

- Providing opportunities for grantmakers to learn and strategize about cutting-edge racial justice issues and how they apply to their work within various fields;
- Engaging in internal assessments of foundations' institutional needs around racial equity and justice and coordinating or adapting tools to most effectively meet them;
- Consulting with cornerstone nonprofits that explicitly address issues of structural racism to strengthen their capacity, increase coordination and impact; and
- Assisting local community leaders and funders identify and sustain effective approaches to achieve racial justice.

Learn more at www.racialequity.org.

"There has to be a more comprehensive toolkit to help (PSOs) start and advance the work on racial equity."

Going Forward

In order to assist Forum members trying to get started or to further develop their work, scan respondents expressed a need for toolkits of best practices and greater access to speakers/facilitators, curriculum and more case studies of foundations at different levels (many case studies already exist). One respondent suggested, *"There should be a toolkit that is applicable to size and scope and scale. Something that helps people figure out where to start."* This is especially particular to effectiveness around training of boards. In general, it seems many members would benefit from an understanding of what other organizations are doing or who the exemplars may be for the newer organizations. Many wonder how those with no experience in this area can start. There was also a heavy emphasis for many regional PSOs on having content tailored for their unique regional circumstances.

Another crucial resource listed was funding. Again, alluding to the need to cover the cost of consultants and the cost of trainings and workshops.

One important way most respondents feel the Forum can be helpful in assisting its members is by acting as a "convener" and a "connector," where peer organizations can learn from each other and share failures as well as successes through open trainings or conference calls among cohorts and affinity groups.

These peer learning settings may help members to share their proposed learning agenda with peers and get feedback. Additionally, Forum members stated it would be helpful if the Forum would have a list of specific trainings or know which Forum members have used specific trainings or consultants. Ultimately respondents would like to have a way to share documents and resources with each other, whether it be a database or virtual library.

Another way the Forum can be helpful, according to respondents, is by assisting members in attaining funds. The Forum could be positioned in a leadership capacity to encourage multiple foundations to invest in addressing racial equity. In this way, members can gain access to dollars via the Forum, such as through a matching grant program.

- *"Can the Forum cultivate national funders—perhaps create a fund for members? Perhaps members could match or the Forum could provide a match to help them fundraise for this work."*
- *"There has to be a more comprehensive toolkit to help (PSOs) start and advance the work on racial equity. It would be helpful to know about the speakers that (PSOs) have been using. It would also be useful to have a group of peers who are doing racial equity work—such as a listserv."*

Appendix A – Survey Scan Questions

Your Current Work

Racial Equity Programming You Have Developed

Please list and briefly describe any programs on racial equity that your organization has developed and presented in the past two years (provide links or attachments as possible or appropriate):

Racial Equity Tools You Have Developed

Please list and briefly describe any tools, publications, research or other resources on racial equity that your organization has developed (provide links or attachments as possible):

Racial Equity Training You Provide

Please list and briefly describe any type of racial equity training that your organization provides to other organizations (please provide links or attachments as possible):

Racial Equity Learning & Networking Groups

Please describe any opportunities you offer to your members or other constituents to connect, share and learn with their colleagues and peers on racial equity issues on an ongoing basis (member networks, learning groups, etc.)

Racial Equity Strategy

Please describe any strategies or strategic frameworks your organization has developed and is using to guide your work on racial equity (provide links or attachments as possible):

Racial Equity Working Groups

Please describe any groups your organization currently manages (committee, working group, task force, etc.) to guide your organization's work on racial equity:

Racial Equity Assessment and Evaluation Tools

Please describe any racial equity assessment and evaluation tools that your organization has used:

Other Work

Please list and briefly any other work you are doing related to racial equity that does not fit into any of the questions above but that you want us to know about:

Most Helpful Resources

Please share the resources/materials/tools that your organization has used, but didn't create, that you've found to be the most helpful in your work to advance racial equity in philanthropy (include links when possible)

Please upload any files as appropriate.

Your Future Needs

Greatest Needs

Please describe your top-priority needs to help your organization start, continue or strengthen your work on advancing racial equity in philanthropy:

Biggest Gaps

Please describe the biggest gaps you see in what is available (in terms of programming, tools, training, etc.) to support your organization's work on advancing racial equity in philanthropy:

Your Recommendations

Speakers You Recommend

Please list any speakers on racial equity issues that your organization has used and that you would recommend to your PSO colleagues and briefly describe the topics/issues that they covered:

Facilitators You Recommend

Please list any facilitators on racial equity issues that your organization has used and that you would recommend to your PSO colleagues and briefly describe the type of facilitation that they provided for you:

Trainers You Recommend

Please list any trainers on racial equity issues that your organization has used and that you would recommend to your PSO colleagues and briefly describe the type of training that they provided for you:

Appendix B – Interview Questions

PSOs were interviewed by phone guided by the following questions:

1. Do you want to elaborate on any aspect of your responses to the scan?
2. What led to development of your initiatives of racial equity?
3. How was this received by your membership initially and now?
4. What kind of feedback are you getting from members on your organization's focus on racial equity?
5. What have your members been requesting regarding how to advance racial equity in their institutions?
6. What was the process by which you developed these efforts?
7. What has worked well so far?
8. Why do you think this was successful?
9. What are the primary reasons why these efforts were successful?
10. What have been the greatest challenges you have faced so far?
11. If you could have done anything differently about implementing these efforts, what would it be?
12. What are your short-term goals for your organization's efforts on racial equity?
13. In the long run, how would you define success for your organization's approach to racial equity?
14. What resources, assistance, or guidance would be useful to you as you continue to address racial equity?
15. How specifically can the Forum help in this regard?