

# Responsive Philanthropy

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## Tackling racial justice: Why, how and so what? The story of one group of local grantmakers

Jennifer Lockwood-Shabat was in New York City on December 3, 2014, when the grand jury decided there was insufficient evidence to charge Police Officer Daniel Pantaleo in the death of Eric Garner. When Lockwood-Shabat, president of the Washington Area Women's Foundation, contacted me, she said, "I was standing in the crowd, a white woman, committed to social justice,

standing with those who felt this was a clear injustice. I could stand, but I didn't know what else to do."

That sentiment of not knowing what to do had started to resonate in the metropolitan Washington, D.C., philanthropic community in 2013, after the acquittal of George Zimmerman in the death of Trayvon Martin. A full house of philanthropists and foundation staff had taken the time to hear Dr. Gail Christopher of the W.K. Kellogg Foundation talk about unconscious bias and the Kellogg Foundation's work on racial healing. "If it's unconscious, what can we do?" some asked. "The whole issue of racial healing suggests that there is a racial wound. I don't know how we

By Tamara Lucas Copeland

would talk about that," was a sentiment voiced by many in various ways.

This sense of the massiveness of the issue, the minefield of deep-seated feelings and the need to respond to other issues for which the responses seemed more immediate and apparent effectively silenced any conversation on racial justice.

Then Michael Brown was killed in August 2014, Tamir Rice in November 2014 and Walter Scott in April 2015.

In my role as president of the Washington Regional Association of Grantmakers (WRAG),<sup>1</sup> an association of foundations and corporate-giving programs committed to the Greater Washington region, I started *(continued on page 9)*



challenging grantmakers  
to strengthen communities

# A message from the President and CEO



Dear Readers,

Is philanthropy finally getting serious about racial equity and racial justice? I don't know. But I'm pleased with some of the sustained conversation that has been happening, and we are delighted to keep fanning the flames with this issue of *Responsive Philanthropy*.

In "Tackling racial justice: Why, how and so what?", Tamara Copeland, president and CEO of the Washington Regional Association of Grantmakers, writes about association's journey in confronting the issue of race and racial justice among its members. Others in the sector who want to address structural racism in their own institutions can learn much from WRAG's "Putting Racism on the Table."

Next, check out "For Surdna Foundation, communities define their futures," by William Cordery, a program officer for Surdna's Strong Local Economies program. He shares how the foundation is supporting efforts to grow locally owned businesses, create quality jobs and improve jobs held by low-wage workers to boost economic opportunities for low-income communities, people of color, women and immigrants.

Most foundations want to know the impact of their grantmaking on causes and communities they care about. In "Building a community-centered evaluation program," Robert Sturm and Lee Francis IV of Indigenous Methods takes us through the development of an evaluation framework for Notah Begay III Foundation's initiative to reduce obesity and Type 2 diabetes among Native American children. They highlight why it's important that evaluation frameworks and processes are informed by the context and culture of communities where the work is taking place.

Finally, our Member Spotlight features Public Welfare Foundation, a D.C.-based national grantmaker that seeks to advance justice and opportunity for people in need through programs on criminal justice, juvenile justice, workers' rights and civil legal aid.

We'd love to hear your thoughts about these and articles from previous editions of *Responsive Philanthropy*. Send your comments to [community@ncrp.org](mailto:community@ncrp.org) or connect with us on Twitter (@ncrp) and Facebook (/NCRPCommunity).

Sincerely,

Aaron Dorfman  
President and CEO, NCRP

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# For the Surdna Foundation, communities should define their futures

By William Cordery

When people have asked me what compelled me to join the team at the Surdna Foundation<sup>1</sup> more than a year ago, I've often shared that I saw a philanthropic organization that is not only guided by principles of social justice, and working to address real societal problems, but one that is committed to investing in new ways of building economies, environments and communities that place those directly impacted by inequity at the center of making decisions on the best solutions.

In essence, I saw Surdna as a foundation that was driven to invest in a better, more just world with people at the center. And this was important to me as a former fundraiser and organizer for Project South, an organization whose work for racial and economic justice was guided by principles of investing in people, place and regional identity across Southern states. Few national foundations support marginalized communities in building local leadership and long-term infrastructure that not only works to address current challenges, but also prepares them for future challenges and supports their leadership.

As a family philanthropy, Surdna and the Andrus family have been practicing responsive philanthropy for nearly 100 years. Much of those years were devoted to direct service and programs for children. In 1989, the third and fourth generations of the Andrus family established Surdna Foundation's programs in environment and community revitalization, which came with a deci-

sion to expand the professional staff to broaden the foundation's effectiveness. By 1994, programs in effective citizenry and the arts were added. Guided by the principles of social justice, the foundation today seeks to foster sustainable environments, strong local economies and thriving cultures in marginalized communities in the United States.

Surdna Foundation is a national philanthropic leader working across both the public and private sectors to actualize smart and inclusive economic growth. I am especially excited by what our Strong Local Economies program has so far accomplished and the work that continues. The line of work, which I lead, is committed to improving the lives and economic opportunities for low-income communities, people of color, women and immigrants by investing in communities to win good economic policies, building and growing locally owned businesses, creating quality jobs and improving jobs that millions of low-wage workers hold by bringing up the labor market.

I am inspired by the vision of a country where communities that have been systematically locked out of economic mobility can realize true economic opportunities and security.

## MINORITY BUSINESS INVESTMENT

One of the areas of work under the Strong Local Economies program is Business Development and Acceleration (BDA), which aims to create jobs and wealth in communities through thriving, diverse, sustainable local busi-

nesses increasingly owned by people of color, women and immigrants.

This past year we continued to focus our efforts on harnessing the power of the private sector to broadly promote quality job growth in local communities. Our work with minority-, women- and immigrant-owned businesses remain one of our larger areas of investment. Our program is able to provide grant dollars to business accelerators – private or nonprofit entities that provide early capital and technical assistance to start-ups and small businesses to assist with their growth. Many minority-owned businesses struggle to secure the capital needed due to their size, location and leadership.

The business accelerators we are supporting provide an array of services to a diverse business audience. One of them is Chicago United. As part of Chicago United's Five Forward 20/20 Initiative, each company commits to working with five local minority-owned firms over five years, better positioning local minority-owned firms to compete for corporate contracts. To date, Chicago United has produced partnerships with 21 area companies that reported spending an aggregate of more than \$350 million in 2014. Among these businesses, a select number of minority-owned enterprises created more than 4,700 jobs.

Some of the most compelling work happening in the BDA portfolio is the investment in converting small businesses into worker-owned cooperatives. In a recent report, *Ours to Share: How Worker*

*Ownership Can Change the American Economy*,<sup>2</sup> Surdna explored the opportunities of worker-owned firms to fundamentally change local economies and to build wealth for historically low-income communities.

With the pending retirement of tens of thousands of baby boomers that were successful in entrepreneurship, there is going to be a huge transfer of wealth in this country. That wealth could be transferred to a larger corporation in a buyout, to a developer for repurposing of their land or to the workers who've worked for those small businesses for years who would now have an opportunity to own a business and help drive the local economy. Transferring ownership of a business from just one person or group to the business' workers creates opportunities for workers to build wealth, to own their work and products in an entirely new way and to increase economic activity in communities that have suffered from years of stagnation and inequity.

Although this model of local economic drivers redistributing wealth is relatively small, there are immense opportunities to scale and make this a practice of wealth redistribution that is good for workers, retired business owners and local economies.

## ECONOMIC DEVELOPMENT FOR AND BY THE PEOPLE

Historically, economic development projects do not benefit all populations and oftentimes exclude the communities we serve – low-income, people of color and immigrants. We believe that economic development can be done in a different way – a way that reaches beyond city centers and produces positive impacts on local communities, placing its residents at the decision-making tables and creating opportunities for economic mobility.

The attention being paid to growing income inequality and an uneven economic recovery this past year has created an opportunity to redefine economic development guidelines and practices to include equity and to engage people directly affected by development at the most local level. Surdna is working with a host of economic development, policy research and nonprofit and philanthropic partners to further advance an equitable economic development framework.

This summer, the Surdna Foundation, in partnership with the National League of Cities, PolicyLink, the Urban Land Institute and Open Society Foundations, launched the first-ever Equitable Economic Development Fellowship. This is a two-year, \$1 million effort

to promote equity, transparency and sustainability as driving forces in local economic development efforts. It also will provide participants with leadership development, technical assistance and peer learning. Leaders were chosen from six cities for the inaugural class: Boston, Charlotte, Houston, Memphis, Milwaukee and Minneapolis. We and our partners are hopeful that advancing an equity frame in these respective communities at this time will place local leaders in positions of influence at the cusp of impending economic development boom in these cities.

## WORKERS AND THE ECONOMY

Through our Job Quality & Career Pathways (JQCP) line of work, we strive to improve the quality of jobs and conditions of work in low-wage sectors in this country as well as expand access to higher-paying jobs, identify and develop promising career paths in emerging industries and seek the overall improvement of economic mobility.

Over the past few years, advocates have fought for and celebrated tremendous policy wins that improve conditions of work for millions in this country – from increasing the minimum wage to securing paid sick and family leave, fair scheduling and other labor standards improvements that have the potential to transform the lives of working families. As a result, there are renewed efforts around the country to engage key stakeholders in the enforcement of job quality measures. Many cities have dedicated staff focused on policy implementation, but some cities still lag behind with insufficient staff, accountability measures or true commitments to achieve intended results.

Surdna is working to better understand the capacity needs and current challenges of government in addition to community-based interventions to realize the benefits of new policies to improve the quality of jobs. This past July, in *(continued on page 8)*



# Building an inclusive community-centered evaluation program

By Robert Sturm and Lee Francis IV

In Native communities across the country, childhood obesity and Type 2 diabetes have grown in the past decades. Studies show that Native American youth, ages 10-19 are nine times more likely to have Type 2 diabetes than white youth of the same age. The incidence of Type 2 diabetes in American Indian youth between the ages of 15 and 19 more than doubled between 1990 and 2009.<sup>1</sup>

The Notah Begay III Foundation (NB3F), which seeks to reduce obesity and Type 2 diabetes among Native American children, partnered with Indigenous Methods, LLC to develop an evaluation plan for Native Strong, its grantmaking program that provides tribal communities with the tools and information they need to improve children's health.

NB3F's work is based on the understanding that, in order to create meaningful, sustainable change, it must authentically engage community partners<sup>2</sup> and the communities they serve in a collaborative process that meets partners where they are, acknowledges the context in which they work and works with and in communities, rather than on them. The foundation's approach to working with its partners involves acknowledging the profound strengths and resources that Native American communities bring to this work and the barriers they may experience in efforts to mobilize these resources to affect positive change. It assumes that individual communities know who they are and what they need and that they hold valuable resources in their values, cul-

ture, history and stories. At the same time, the history of colonization, generations of trauma and pervasive devaluing of Native ways can mask these assets and make it difficult for a community to clearly see its assets and understand how to use them in effective ways to improve health.

Indigenous Methods' task was to find a process for defining and developing metrics that are flexible and diverse enough to fit the many different projects and communities involved with Native Strong and yet structured and rigorous enough to provide data that can be aggregated for a meaningful assessment of Native Strong's overall grantmaking. Additionally, we needed to outline methods for the gathering and analysis of data that were effective and easy to use and metrics that are meaningful to both Native American communities and mainstream funders and researchers. Finally, the metrics needed to be created in such a way that would support the work and its impact rather than hinder success through lack of alignment with the work itself or the values of the communities where the work takes place.

## USING INDIGENOUS METHODOLOGY

Indigenous Methods and NB3F made the decision that, rather than providing technical assistance to community partners to help them engage in mainstream evaluation techniques, we would instead develop an evaluation plan based on approaches more congruent with those of the communities

served and demonstrate the rigor of this approach to funders and others unfamiliar with it.

Before we could define what to measure or how to measure it, we needed a model of health that reflects the experience and values of NB3F and the communities in which it works. The Indigenous Health Model (see Diagram 1) we built is represented as a convergence of multiple components bound together in a spider web. The image demonstrates how the various components are connected as parts of the whole and how changes in any area will affect other areas and components of that web.

This model of health includes an ecological systems model, drawing upon the work of Urie Bronfenbrenner,<sup>3</sup> but uses indigenous terminology and perspectives at each of the ecological levels. The Individual Level speaks to a subjective perspective and an awareness of individual biases, understandings, relationships and assumptions. This is the level at which the individual asserts personal agency and choice. The Family Level references familial connection, including clan, kiva, moiety and extended family connections. It involves people who are related to the individual and have a strong influence on the individual's actions and reflections. The Community Level represents the community in which the individual and family reside and/or are most closely associated. The community dictates norms and values and can have a powerful influence on the individual through the framing of meaning and value conveyed in cultural

and traditional understandings. The final level is Creation. This level includes all that exists beyond the community, what binds everything together: the ecology, environment, mainstream culture and messages. It adds an important cultural element missing from Western models and allows for a broader understanding of the contextual influences and impact of the work.

Understanding this complex and intertwined relationship is key to understanding multiple impacts from projects and programs. Seeing health through this lens acknowledges that the health of each individual is influenced by the people around him or her and the context in which that person lives as well as by personal choice. This not only removes blame from those who are unwell, avoiding shame and stigma, but also demonstrates that actions taken at the levels of family, community or creation can have a profound impact on the health of individuals, and that it is appropriate to use metrics that look at these levels to evaluate a program.

Each community partner is urged to select metrics that fit this model and are also appropriate to the organization’s program and vision of success.

Among indigenous peoples, the four aspects of health – physical, mental, emotional and spiritual – are significant determinants of healthy behaviors and community sustainability. Thus any health-related project or program must take into account all of these aspects and have awareness of how each aspect is affected by its work.

In indigenous communities, identity and meaning are defined and understood through relationships and are stored and reflected in language, culture, stories and ceremony. In the modern Western model, the individual can determine his or her identity in isolation, choosing to “be whoever you want to be.” In indigenous cultures, a person is defined through relationships with family, community and creation.

Using this indigenous understanding of health, we went on to create a simple model that shows how the relationship

among planning, project implementation and project evaluation is ongoing and that evaluation is something we all do naturally, though we may not document the process carefully. The latter point was essential in order to demonstrate to community partners that evaluation is not something alien and that, if properly organized and recorded, the ways in which they already assess their work can be built into a rigorous evaluation structure that will provide the necessary data for reporting on their programs and also help them to structure and understand the lessons learned from their work.

The Indigenous Model of Planning and Evaluation (see Diagram 2) shows this work as an iterative cycle in which the lessons learned in one cycle inform the choices of the next. This reflects an understanding that, while we don’t always know what actions will successfully address a particular concern, what we can do is develop an idea, try it out, see what happens, learn from the experience and refine our choices. As long as we are

DIAGRAM 1: Indigenous Planning and Assessment Model

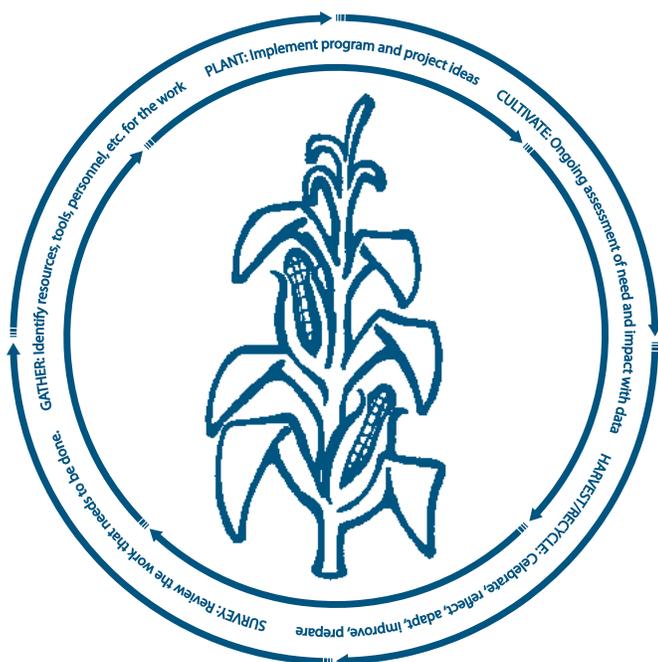
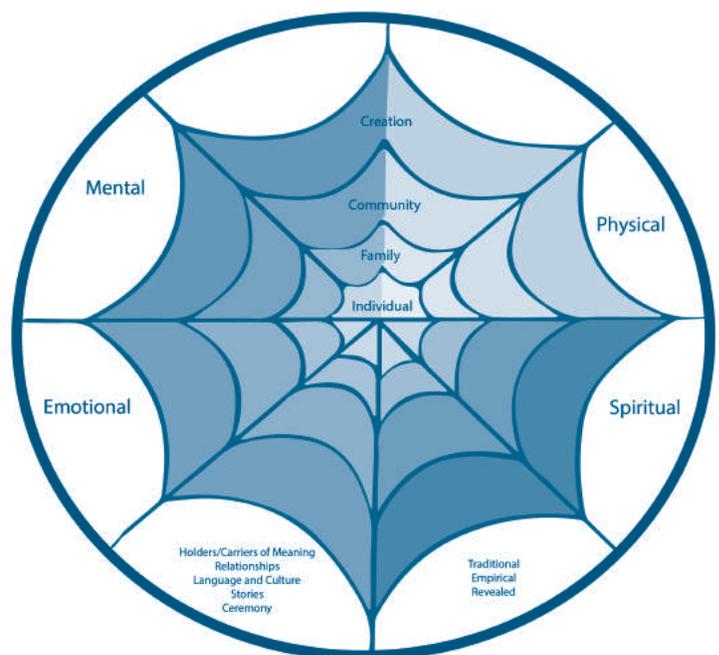


DIAGRAM 2: Indigenous Health Model



learning, our work is successful and we are moving closer to a solution.

Next, we looked for an already tested evaluation framework based on Native American culture and chose the one developed by the American Indian Higher Education Consortium.<sup>4</sup> This framework is guided by five main principles: context is critical, place-based, recognition of gifts, centrality of family/community and Nation building.

To bolster this evaluation framework, we incorporated the *Seven Directions* approach developed by Red Star Innovation's Tribal Public Health Institute (TPHI) Feasibility Project, which examines the potential roles for a tribal public health institute in improving health among American Indian and Alaska Native communities.<sup>5</sup>

- Knowledge: access and use data and information in a meaningful way.
- Service: develop internal capacity, "grow your own."
- Governance: strengthen public health authority as a function of sovereignty.
- Sovereignty: expand advocacy and influence on federal policy.
- Culture and identity: reclaim, revitalize and reaffirm indigenous knowledge and traditional practices.
- Integration: make important connections and collaborations to integrate public health and health care systems.
- Families and communities: create healthy environments that support well-being.

Our model also incorporates the indigenous realms of knowledge described by Marlene Castellano:<sup>6</sup> traditional knowledge, empirical knowledge and revealed knowledge. Traditional knowledge encompasses the critical learnings and teachings

that emerge from stories and cultural engagements as passed on through multiple generations of families, clans and community members. Empirical knowledge encompasses the learnings that can be explained through observation and experimentation. Revealed knowledge encompasses the learnings gained from prophesy or spiritual revelations. In a modern context, we can adjust this to mean intuited knowledge that can be elusive and difficult to explain without connections to the other two domains.

### APPLYING THE EVALUATION PROCESS

This basic structure is only the beginning. In working through an indigenous lens, it is important to include the knowledge and experience of all individuals and communities involved in the process: the NB3F staff, the staff of community partners and members of the communities where the projects take place. Additionally, the process of planning, development and assessment is ongoing and cyclical. Thus the evaluation plan must be a living, evolving structure that is able to develop and change as new information becomes available.

Recognizing that the community partners that are most successful at engaging and working with their communities may never be fully conversant with the theory and vocabulary of program evaluation and may not be comfortable or adept at reporting on their work in written form, we suggested that NB3F adapt its application and evaluation process to help partners succeed with this aspect of the work. Suggestions included the use of less-specialized vocabulary in documents that ask community partners to talk about their work, trainings in how to integrate evaluation into their programs from the outset to make the process less onerous, and the implementation of procedures to formally capture information

### New and Renewing Members

American Jewish World Service  
Arca Foundation  
Blandin Foundation  
Community West Foundation  
Compton Foundation  
Conrad N. Hilton Foundation  
Cricket Island Foundation  
David and Lucile Packard Foundation  
Gordon and Betty Moore Foundation  
Jesse Smith Noyes Foundation  
Korean American Community Foundation  
Liberty Hill Foundation  
Los Angeles Alliance for a New Economy (LAANE)  
Minneapolis Foundation  
Nathan Cummings Foundation  
Needmor Fund  
New York Foundation  
Rappaport Family Foundation  
Scherman Foundation, Inc.  
Southern Bankcorp Community Partners  
Stewart R. Mott Foundation  
Unitarian Universalist Veatch Program at Shelter Rock  
Women's Foundation of Minnesota  
Woods Fund of Chicago



## We've Moved!

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gathered from partners through conversations and interviews, so that those who are better at expressing themselves verbally than in written form can still report fully on the work.

Ultimately, the development of a system, process and metrics for an indigenous health evaluation model is centered around aligning the work or, in this instance, the grantmaking to the way in which that work is measured. Too often, Native communities are forced to analyze and assess their work in a way that does not support the work they have accomplished in the community.

In fact, modern Western evaluation methodology can undermine the work by using metrics that are not reflective of the Native context, such as culture, ecology, environment and history.

The model that Indigenous Methods has cultivated is an example of how community and cultural engagement has the potential to yield far richer information, which can be utilized in

more effective and efficient ways to the benefit of indigenous communities. ■

*Robert Sturm and Lee Francis IV are consultants at Indigenous Methods. To learn more, contact [robert@teoxihuitl.com](mailto:robert@teoxihuitl.com).*

## Notes

1. "Diabetes in American Indians and Alaskan Natives: Facts at a Glance," Department of Health and Human Services, Indian Health Service Division of Diabetes Treatment and Prevention, 2012, [https://www.ihs.gov/MedicalPrograms/Diabetes/HomeDocs/..Resources/FactSheets/Fact\\_sheet\\_AIAN\\_508c.pdf](https://www.ihs.gov/MedicalPrograms/Diabetes/HomeDocs/..Resources/FactSheets/Fact_sheet_AIAN_508c.pdf).
2. One of the decisions made during the process of updating the foundation's grantmaking model was to replace the word "grantee" with the term "community partner" to acknowledge shared learning, responsibility and goals.
3. Urie Bronfenbrenner, "Developmental research, public policy and the ecology of childhood," *Child Development*, March 1974, Vol. 45, No. 1, pp. 1-5.
4. Joan LaFrance and Richard Nichols, *Reframing Evaluation: Defining an Indigenous Evaluation Framework* (Alexandria, VA: American Indian Higher Education Consortium, 2009).
5. Judy Beaudette and Allison Matsumoto (editors), *Seven Directions: A Blueprint for Advancing the Health and Wellness of Our Native Communities* (Tucson, AZ: Red Star Innovations, 2015).
6. Marlene B. Castellano, "Updating aboriginal traditions of knowledge," in G. Dei, B. Hall & D. Rosenberg (eds.), *Indigenous Knowledges in Global Contexts: Multiple readings of our world* (Toronto: University of Toronto Press, 2000), pp. 21-36.

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## Surdna Foundation *(continued from page 4)*

partnership with the National Employment Law Project and Rutgers University Center for Innovation in Worker Organization, we convened leaders from worker organizations, government agencies and small business advocacy groups from across the country to share some of the challenges and opportunities they're facing, the importance of worker power, business compliance and revenue sources separate from local and state budget negotiations to fund enforcement of labor policies.

Over the coming year, we will explore how best to invest in efforts to safeguard all of the significant strides we've made in creating good economic policies as well as how best to respond to preemptive attacks that attempt to halt progress.

### THE IMPORTANCE OF PEOPLE AND PLACE

As we approach our centennial, the Surdna Foundation understands just how important people and place are to a community's ability to flourish. History has taught us that trickle-down economics do not work. In order to create the ecosystem needed for local communities to thrive economically, socially and culturally, we have to invest in their success at the local level.

Over the summer, the foundation staff conducted an exercise during a staff retreat that challenged us to summarize Surdna's mission-driven work in eight words. One of my favorite statements was "Communities define their futures. We support their goals."

As a social justice foundation, we are not alone in this sentiment. Although our collective resources are somewhat finite, if all of philanthropy was responsive in a way that put the resources into the hands of those most affected, we could lead a renaissance that would drastically reshape how communities and economies are driven. ■

*William Cordery (@WilliamCordery) is program officer of Surdna Foundation's Strong Local Economies program.*

## Notes

1. To learn more about Surdna Foundation and its programs, visit [www.surdna.org](http://www.surdna.org).
2. See <http://www.surdna.org/images/pdf/OursToShareWeb1.pdf>.

# Tackling racial justice

(continued from page 1)

getting phone calls from funders. These foundation and corporate leaders were concerned about what was happening to black people across the country. The headlines about Brown, Rice, Scott and many others were both chilling and becoming routine. Though many were concerned, there was no clarity about the appropriate role of the funding community.

Then it happened in Baltimore. After being arrested, Freddie Gray died from injuries suffered in a police van. The protests that followed, 40 miles from D.C., drove home for WRAG and our members that, though we may lack clarity, it was not an excuse for inaction.

## INACTION WAS NO LONGER AN OPTION.

WRAG called a meeting of the leaders of the major foundations in the region. ...

*“Could this happen in the Washington area?”* Of, course.

*“Could we agree on a collective statement about the incident and the aftermath?”* No, we didn’t think we could.

At that meeting, it became evident that language about race and justice was being used differently, that the philanthropic executives who were in the room felt that their trustees might not agree on the need for a collective philanthropic response, and just what that response should be was not clear. What the group did agree on, however, was that, at a minimum, the unconscious bias that Christopher had discussed over a year before was key, and, more likely, there was a larger issue at play: racism. Once that word was said, the floodgates opened.

These philanthropic leaders said they didn’t want to give grants without understanding the role that race and racism were playing in what was happening across the country. They didn’t want to rely on their business-as-usual mode of supporting education reform or workforce development or affordable housing. There was an understanding that

all of those needs are symptoms of a deeper, systemic problem that had to be acknowledged face on.

But still the question was, “What to do?”

## LET’S TALK ABOUT RACE.

That’s when Nicky Goren, president of the Eugene and Agnes E. Meyer Foundation, reminded the group of a quote from John Gardner, founder of both Common Cause and the Independent Sector: “The first step of leadership is not action; it’s understanding.” That’s when we knew what to do. That quote launched the D.C. philanthropic community on a profound learning journey called “Putting Racism on the Table.”<sup>2</sup>

“Putting Racism on the Table” started as a six-month lecture series with a single aspect of racism being explored each month. The series covered structural racism, white privilege, implicit bias, mass

incarceration, which was explored as an example of the confluence of the previous three topics, the “racial mosaic” of America and, lastly, the role of philanthropy.

WRAG was working to enhance knowledge about racism while also building a cohort of philanthropic leaders who could, and would, lead on this topic in the Greater Washington region. To make sure that the information was heard and digested, several factors were key: who led the conversation, where that conversation occurred, how the conversation was formatted and who attended.

**Speakers.** Professor John A. Powell, in his talk on structural racism, set the tone. He said, “Discussions about racism are like exercise. We want you to feel the burn, but not get hurt.” The speakers were all like Powell, grounded in research, individuals who had been exploring their subject for decades. They were passionate about racial justice but not so impassioned that the facts were lost in emotion.

**Location and format.** We wanted familiarity with the location and with the process. The thought was that if we could create comfort and routine with the location and the process, these would contribute to comfort among the group and with the topic. So the location was always the same, and the format was always the same: a brief facilitated reflection on the previous session, a one-hour presentation by the topic expert, brief Q and A with the speaker, then a one-hour facilitated discussion that occurred in small groups and then with the group as a whole. One facilitator guided the group through all of the sessions.

**Participants.** We wanted to focus on the top leaders at each WRAG member institution. We knew that enhanced understanding among CEOs and their boards was critical for organizations to make the necessary internal shifts to address racial equity. Limiting par-

“The first step

of leadership

is not action;

it’s understanding.”

– John Gardner,  
founder of Common Cause  
and Independent Sector

“We will not remember the words of our enemies  
but the silence of our friends.”

—Martin Luther King, Jr.

ticipation also allowed us to build a cohesive leadership cohort across the local philanthropic community, so initial participation was limited to CEOs and trustees. For some time, CEOs had been convened under the WRAG umbrella for other learning opportunities. Strong familiarity and a sense of trust had developed among them. Now, with “Putting Racism on the Table,” trustees were being brought into that existing safe space in an effort to build a larger cohort of leaders in the region with a shared understanding of racism.

### WE FELT THE IMPACT IMMEDIATELY.

In June, the learning series ended, but the evidence of an impact didn't wait until then to emerge. It started almost immediately.

First, even though each program was three hours long, a significant time commitment for any leader, these leaders made the commitment to the learning journey. Our desire had been for attendees to participate in as many sessions as possible. The topics were not superficial. Attendees needed to hear what was being said, think about it, talk with others and find their place relative to the topic. Seventy-two percent came to two or more of the sessions.

Following each session, we asked for feedback. The value of the sessions in opening minds and expanding thinking quickly became clear. These comments are illustrative of what we were reading every month as we reviewed the commentary afterward:

- “After the session on structural racism, I realized how little I know about racism.”

- “The systemic nature of racism is more pervasive than I had previously understood.”
- “I think there are situations where white privilege is so ingrained that I am not even aware of the impact I am having just by being present or in casual conversation.”
- “Having been through the session on implicit bias, I better understand the strong and powerful way our subconscious influences our thinking and actions. What can we do?”

It wasn't far into the six-month series that the “what can we do?” sentiment became pervasive. The attendees wanted to continue the learning because they were realizing how incomplete their knowledge was and they wanted to act on what they had already learned.

### THERE WAS A CLAMOR FOR MORE.

From this desire emerged “Putting Racism on the Table: The Training Series.” WRAG quickly moved, following the lecture series, to coordinate programming with a clear focus on action. We began coordinating training sessions for the local philanthropic community, including program officers, to help them understand how to use a racial equity lens in their grantmaking regardless of the issue areas that form their philanthropic focus. We will also conduct trainings on how to communicate about race and racism with friends and colleagues who have not had the type of extensive learning opportunity afforded to the WRAG community.

### WE ARE STARTING CONVERSATIONS ACROSS THE COUNTRY.

While the audience was limited to local philanthropic leaders, WRAG wanted the “Putting Racism on the Table” experience to have a broader reach; thus, the one-hour lectures were filmed. The response to the videos has been overwhelming. The videos are being used as learning tools by other regional associations of grantmakers and as discussion starters with the staffs of local philanthropic organizations. Local business leaders who experienced the lecture series in their role as philanthropic trustees are now asking how other business leaders can be exposed to the learning series. Talk is underway about how to adapt the videos into teaching tools for high school students in the area, and soon the series will be available as podcasts.

It's too early to know the ultimate outcome of this work, but, remarkably, this community is no longer silent. A true conversation exists where there wasn't one before. An understanding of the depth and breadth of ways that people are advantaged and disadvantaged due to their race is growing across our region. And, most importantly, leaders who have demonstrated their ability to be change agents on so many issues are now tackling a topic that has been hidden or ignored for far too long. WRAG has put racism on the table. ■

*Tamara Copeland is president of the Washington Regional Association of Grantmakers.*

## Notes

1. To learn more about WRAG, visit [www.washingtongrantmakers.org](http://www.washingtongrantmakers.org).
2. Visit [www.washingtongrantmakers.org/putting-racism-table](http://www.washingtongrantmakers.org/putting-racism-table).

# Public Welfare Foundation

[www.publicwelfare.org](http://www.publicwelfare.org)

# Public Welfare Foundation



Photo by David Y. Lee for the Public Welfare Foundation.

**NCRP:** *How do you think about your role as a national foundation doing social justice work and committed to influencing public policy?*

**PWF:** Our mission is to advance justice and opportunity for people in need, honoring our core values of racial equity, economic well-being and fundamental fairness for all. We have three programs – Workers’ Rights, Criminal Justice and Juvenile Justice – along with a special initiative on civil legal aid that aims to help low-income people gain access to the civil justice system. We focus on making a difference through policy change and system reform.

We have chosen some difficult areas of social justice that, despite great importance, do not always get attention from policymakers or support from funders. But we try to act as a catalyst and call attention to select issues in each program area after consulting with various experts and grantees. We use clusters of grants and targeted, multi-year reform strategies to move toward concrete outcomes. We recognize that social justice reform has no straight path to progress. But our goal is to support work that builds toward transformative change over the long term.

In each program area, we deploy a multistate strategy to develop advocacy infrastructure, typically assisted by national groups. Target states can serve as models for other states, and, with intentional strategies, reforms in those states can be leveraged to bring an issue to the “tipping point” nationally.

**NCRP:** *What are the top challenges you face as PWF and its grantees try to make*

*headway on long-standing issues like criminal justice reform and workers’ rights? How are you addressing these challenges?*

**PWF:** Because our program areas are not often priority issues for other funders, the groups we support are significantly underresourced. For our grantees to win – and then to sustain – reforms, we help build their organizational and advocacy capacity, such as communications, fundraising, and data collection. Reform rollbacks are a constant threat and progress ebbs and flows, so it is important to ensure that grantees can remain strong for the long run.

To help spark nationwide reform on issues where the traction is often found in the states, we have sought to turbocharge state-based grantee advocacy work by helping create umbrellas or “hub” mechanisms with national reach. For example, in criminal justice, to reduce incarceration and endemic racial disparities, and in juvenile justice, to end the use of youth prisons and redirect resources to community programs, we supported the creation of Alliance for Safety and Justice, and Youth First, respectively. In workers’ rights, we support another hub, out of the Center for Popular Democracy, which helps state groups pursue an integrated multi-issue approach to improving the quality of jobs for low-wage workers. These hubs fortify state campaigns

with technical assistance and allow for coordination among grantees. They can also attract other funders by providing a central location to pool dollars to support multiple state efforts.

Finally, we are always attentive to how reform efforts we support can have an impact and address the major challenge of systemic racial inequities.

**NCRP:** *What key lessons can you share with other grantmakers who are interested in starting or boosting their support for policy advocacy and civic engagement?*

**PWF:** A primary lesson is for funders to stay the course. Social change takes time, and grantees need sustained power to move forward. Accordingly, two-thirds of our grants are multi-year general or program support. Such support is vital for grantee effectiveness because it encourages long-range planning, helps close hard-to-fill budget gaps and fosters organizational stability. It reduces unnecessary administrative burdens on grantees (and us) and, more importantly, conveys a sense of trust in their ability to manage their own affairs.

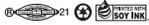
Additionally, we avoid evaluating grantees based on burdensome and unrealistic outcome metrics. There are many different ways to assess progress that are better suited to the reality of complex social change efforts.

Finally, there is no silver bullet. We have seen the best results when grantees can assess a need and then deploy multiple strategies, e.g., legislative and policy advocacy, community organizing, communications, litigation and more. ■



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### ***The Oregon Community Foundation: Can it build a statewide legacy of equity and inclusion?***

By Lisa Ranghelli and Caitlin Duffy June 2016

This second Philamplify assessment of a community foundation examines Oregon's largest grantmaker. Findings show that while OCF is well-respected by many of its constituents, some communities of color and LGBTQ groups do not see signs of progress, despite the foundation's commitment to equity and inclusion.

### ***New York Community Trust: How can this equity funder rally donors and deepen grassroots engagement to further its impact?***

by Lisa Ranghelli and Caitlin Duffy April 2016

This first Philamplify assessment of a community foundation found that The NY Community Trust is committed to equity and serving New York's underserved communities. Findings also show that it can further boost impact by improving its public leadership, deepening support for grassroots community organizing and creatively engaging its donors around equity and social justice.

visit: [www.philamplify.org/foundation-assessments](http://www.philamplify.org/foundation-assessments)

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