

# LESSONS LEARNED & IMPLICATIONS FOR THE FIELD

Given the growing momentum behind conversations about diversity within the philanthropic sector, ARC and PRE felt it was important to share some key lessons learned from the pilot process.

Following is a description of three lessons that are most likely to be relevant to other foundations.

**1** *Foundation leaders are not investing enough time and deliberation into internal discussions about race and racism at all organizational levels. Understanding structural racism requires a significant investment of time and intellectual energy. Without sufficient discussion, competing definitions of racial justice can take root and frustrate efforts to generate new outcomes, such as a reduction in racial disparities.*

One of the main insights from the pilot process is that foundations simply dedicate too little time and too few resources toward building a shared understanding of racial justice. When conversations about race do take place at foundations, they are usually confined to the staff level. They also tend to focus on increasing outreach or services to communities of color, on supporting grantees of color, or on diversifying staff within predominantly white grantee organizations or sectors, rather than on creating structural change in communities. This is one of the most significant barriers to promoting racial justice in the field.

The absence of an explicit and organization-wide understanding of structural racism leads to confusion and inconsistency among staff, board members, and grantees about what racial justice is and why it matters. As a consequence, foundations risk propagating the dominant societal notions about race through inertia. It is tempting to limit the application of an explicit racial justice analysis to a foundation's grantmaking programs. While this is obviously a critical component of any foundation's mission, the integration of racial justice as a framework for *all areas* of a foundation's operations – from strategic planning to communications, from data collection to capacity building – ensures

that a foundation's racial justice goals are clear, consistent, and broadly understood by stakeholders at all levels.

Pat Brandes, Executive Director of the Barr Foundation, acknowledged the lack of an organizational racial justice framework prior to the assessment. "We weren't articulating our racial justice aspirations in any coherent or intentional way," she said. "We simply had them mostly as staff, and we had not really worked on becoming intentional about looking at racial justice through a whole foundation lens."

The ARC-PRE assessment provides an opportunity for foundations to think critically about prevailing concepts of race, as an essential step toward building a racial justice analysis and agenda. The assessment challenges the widely held idea that in order to achieve racial justice, it is enough for organizations to be more inclusive of people of color, or that racism is an interpersonal problem that has little to do with "real" mission-related problems like poverty or the environment.

Challenging these dominant assumptions is not easy. It requires careful planning and a great deal of patience. Even within the most progressive institutions, it is critical to take sufficient time to explore the historical roots of structural racism, how it is kept in place today, and what it means for a foundation's mission.

"It's long, hard work. It requires long, deep, sustained commitment to keep up the conversation with the board and the staff," said Margaret O'Bryon, President and CEO of CHF, noting the challenge of establishing a shared racial justice language. "What's the difference between equity and justice and equality? ... What does the language mean, and what does it mean for how you work? There's no room for jargon."

Without developing a strategic rationale for racial justice work, organizations will continue to see diversity as the end goal, and will miss out on the potential to advance racial justice solutions that further their missions.

Even foundations that have explored the structural roots of racial inequities find that some work generates the need for more work. CHF, for example, had already begun a public discussion through its annual meetings explicitly focused on structural racism. Program Officer Julie Farkas noted, however, that while these events deepened the foundation's understanding, figuring out how to integrate that information into the foundation's programs has been challenging. "That context is so critical. But then how do you operationalize that in your grantmaking? How do you integrate the social determinants into your grantmaking, and still remain a health funder at some level? That's the challenge that we're looking at now."

In particular, how and when to involve a foundation's board is a critical question. Foundation leaders should take care not to overestimate or underestimate the readiness of their board members to embrace racial justice as a central part of the foundation's work. "The quality of the communication with trustees is critical," said Brandes. "Crafting what staff have spent months working to understand into a deep and concise communication for a quarterly board meeting is challenging."

At Barr, the assessment process began among staff members who first educated themselves on the theory of structural racism, and then took time to construct a presentation to their board. The board presentation illustrated the roots and implications of structural racism, and made the case for abandoning some of the most popular and problematic ideas about race and diversity—such as a race-blind, "rising tides lift all boats" frame. Perhaps most importantly, it used carefully tailored language and arguments that took into account the foundation's culture and history.

Foundations that adopt racial justice as an organizational framework should anticipate pushback from some staff, board members, grantees and others who may not share the same perspective. This is one of the key reasons to make sure that stakeholders at every organizational level are well-equipped with a shared racial justice language and analysis.

**2** *Foundations are not using mission- and strategy-driven arguments for racial justice when communicating with their grantees. Instead, they use moral arguments to encourage diversity, and overemphasize outreach and inclusiveness as measures of organizational effectiveness. These approaches*

*are limited in making the case for how racial justice can advance the missions and goals of grantee organizations.*

Approaching racial justice as a mission-driven framework and strategy needs significant work in the field. Foundations and their grantees focus mainly on diversity, and tend to use moral arguments for why it matters (e.g., "It's the right thing to do"). This leads to an overemphasis on outreach and inclusion, which are by and large *tactical* measures, and not on racial justice strategies. Without developing a strategic rationale for racial justice work, (e.g., "Racism contributes to suburban sprawl") organizations will continue to see diversity as the end goal, and will miss out on the potential to advance racial justice solutions that further their missions.

Even when foundations adopt an explicit racial justice focus, if it is not applied holistically, it can create confusing inconsistencies within the organization. For example, a foundation could be using a structural racism framework and language in its external communications and in its grant application materials, but it might not be selecting technical assistance providers that share this framework. Because the capacity-building field, like the rest of society, is dominated by popular notions of race and diversity that fail to consider the roots of structural racism, it is possible for a foundation to encourage grantees to embrace a structural racism analysis on the one hand, while on the other providing technical assistance that reinforces diversity as the central imperative.

In evaluating both CHF and Barr Foundation grantees, it became very clear that even those grantees that had embraced the diversity goals of both foundations had many unanswered questions about how to achieve them, and about what diversity had to do with fulfilling their missions.

Illustrating the typical disconnect between an organization's understanding of its mission and its view of racial justice, one grantee commented, "We have had formal discussion [about racism] at staff meetings, but somehow it gets pushed to the bottom... The core mission takes precedence." Likewise, another grantee implied that having a predominantly people of color client base implicitly meant that the organization was addressing racism: "We don't use [the term] 'racism' directly. It's implied by the fact that we serve 90% African American and Latino communities. It can be deduced."

“We’re definitely much more comfortable talking about [race] and spending more time talking about it, which then leads to more cross-learning and sharing of strategies.”

—Mariella Tan Puerto, Senior Program Officer at the Barr Foundation.

“It was helpful to see that with the exception of a handful of our grantees, race wasn’t really taken into account,” said CHF Program Officer Jacquelyn A. Brown. She noted the importance of understanding racial justice as it connects to a grantee’s health-related mission, and summed it up this way: “Apparently there is something about being a person of color living in the United States that is detrimental to your health. And not because there’s something wrong with *us*, but because there’s something wrong with the way we distribute resources, because of the way society is set up such that opportunity has been hindered on various levels, from health to education, housing, and all of these issues... At the root of it, structural racism is what causes inequities across all of these indicators.”

The Barr Foundation operates in the Boston area, where people of color comprise nearly half the population. Given these demographics, getting organizations to understand the importance of diversity is not difficult. It is only right that organizations reflect the communities they serve. However, encouraging organizations to take on racial justice *strategies*, which involve shifting power, is a different challenge altogether.

“If it were just from a ‘Who are we serving?’ perspective, then it’s all very obvious,” Brandes said. “But if you are trying to get at the underlying structural racism, the policies that have created the disparities and so forth, then it upsets the status quo and requires a complex and sophisticated analysis, not to mention an aptitude for risk.”

A key benefit of having a mission-driven focus on racial justice is that it allows foundation staff to be bolder and more visionary in pursuing racial justice work. Understanding the strategic importance of racial justice gives staff members permission to have frank and difficult conversations about race internally and externally, and to think creatively about how best to achieve racial justice outcomes.

“We feel it’s such a central piece of what we’re doing,” said Mariella Tan Puerto, Senior Program Officer at the Barr Foundation. “I’ve taken the liberty and have been empowered to look at all of my grantmaking with a racial justice lens... We’re definitely much more comfortable talking about [race] and

spending more time talking about it, which then leads to more cross-learning and sharing of strategies.”

As a result of the assessment, the Barr Foundation is now much more explicit about its racial justice focus, and about its expectations of its grantees. Not only has this shift affected how staff communicate with existing and potential grantees, it has also led to changes in the foundation’s grantmaking evaluation tools and procedures.

Program Officer Klare Shaw noted that the revised application process had already led to constructive dialogue with grantees. “There are some people who have written us back and said, ‘We always thought we were doing this, but in having to put together answers for Barr Foundation, we’re being more reflective and making some changes,’” she said. “Another grantee shared a very honest self-criticism, saying, ‘We are really aware that we aren’t where we wanted to be. Being a predominantly white organization isn’t helping us meet our mission.’”

But, not all interactions are so positive. Program officers need to be prepared to have frank conversations. Some nonprofits do acknowledge that it is mission critical to diversify their staff and leadership, and to inform their work with an explicit racial analysis. But, many do not. Some might even resent the suggestion that they need to make changes. In these situations, Shaw notes that, “the important thing for us is to be clear and consistent that we are serious about this. When I get pushback, I let grantees know that while we don’t have hard and fast rules about how integrated organizations need to be, we do expect them to grapple with these questions, and to demonstrate progress over time.”

At CHF, a significant first step has been to roll out a new, open Request For Proposals (RFP) specifically to support community organizing and advocacy with two goals: health justice and access to care. Farkas is quick to point out that the RFP’s access to care component is not focused on individual access to healthcare.

“Our access lens is really about creating and supporting an infrastructure... so that there is a regional, patient-centered, community-based system of care in this area,” she said. “It’s looking at it more from a structural level than an individual level.”

“ Within our local philanthropic community, race and racism affects so much of our work. ”

—Margaret O’Byron, President and CEO of the Consumer Health Foundation

She cited one example of a recent CHF grant to a group advocating to bring a large grocery store into the Southeast Washington, DC area, to provide an affordable source of fresh fruits and vegetables in a neighborhood that had previously only had small corner stores. While the end goal is to facilitate healthier lifestyles, the approach addresses the structural barriers preventing people of color and poor people from eating healthier food. “The strategy is through community organizing and advocacy,” Farkas said.

These changes could not have been achieved without an explicit and mission-driven commitment to integrate racial justice as a core strategy throughout the foundation’s operations.

**3** *An explicit focus on racial justice provides a strategic lens that can open up new strategies, opportunities, and solutions.*

ARC and PRE believe that the most effective way to achieve racial justice outcomes is for foundations to have an *explicit* analysis of racial justice, because being explicit unveils the often coded forms of structural racism. This process, in turn, opens up new space to identify strategies, opportunities, and solutions that might otherwise remain invisible.

Working with the ARC-PRE assessment team helped the Barr Foundation staff and board deepen their understanding of race as a key factor in shaping the institutions, policies and practices that affect people’s lives. As a result, Barr is now being much more explicit about its racial justice analysis across its different programs. This has given rise to a stronger sense of purpose across program areas. Brandes reflected that explicitness has opened the foundation to new knowledge and strategies at every level. “It has given us a certain boldness in terms of both policies and practices, and it has given us a learning agenda to pursue,” she said. “As we look at issue areas, we now very much take a racial justice lens to them. We’re re-looking at all of our theories of change through a racial justice lens.”

Barr Foundation staff are now working to move from theory to practice. They recently convened a daylong gathering of 36 nonprofit leaders from the Boston area, working with a

consultant who uses an explicit structural racism analysis. The group took the whole morning to learn about structural racism, and then spent the afternoon using a structural racism lens to analyze the economic stimulus package.

Barr Program Officer Puerto reflected on how being more explicit has sparked conversations about new strategies and issue areas: “It’s opened us up to considering funding in areas which maybe historically we have not funded in the past, and which at first blush might not seem on point in terms of strategy.”

One example of this is the upcoming Census. In the past, the Barr Foundation would not have had an analysis for understanding the importance of the Census to its mission, and would have likely dismissed it as a funding opportunity. The Census does not fit neatly into any of the foundation’s issue areas, but the staff has acknowledged its enormous and long-term relevance to the foundation’s greater interests. “We’re thinking more broadly,” said Puerto, “whereas in the past we would have said, ‘No, this is not our issue, we don’t fund civic engagement.’”

For CHF, in addition to hosting forums like its foundation’s annual meetings, an important aspect of the foundation’s racial justice commitment is the practice of routinely sharing its own lessons learned with its partners. CHF talks explicitly about racial justice as an active participant in various philanthropic coalitions.

“Within our local philanthropic community, race and racism affects so much of our work,” said O’Byron. She noted that there were several opportunities to collaborate with other foundations, including a working group at the Washington Regional Association of Grantmakers that focuses on social determinants of health equity. “A lot of people are having this conversation, and people understand it more,” she said. “Nationally, Grantmakers in Health is all over the social determinants issue in a really good way.”

Likewise, Brown reflected on the fundamental organizational shift taking place at CHF: “I believe that this work is going to be institutionalized into the fabric of CHF. It was always there in a less explicit way, but now we are really bringing it up to the fore and being bold with it.” ■