

Adopting Equity Practices

Fundamentals of Family Philanthropy

October 13, 2021

Featuring:

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June Wilson, Central Insights; National Center for Family Philanthropy



NATIONAL CENTER FOR
FAMILY PHILANTHROPY

Fundamentals of Family Philanthropy

- ✓ Adopting Equity Practices | October 13
- ✓ Engaging the Next Generation | November 10
- ✓ Succession Planning and Family Transitions | December 9



Today's Conversation

1

What does it mean to adopt racial equity practices throughout your organization?

2

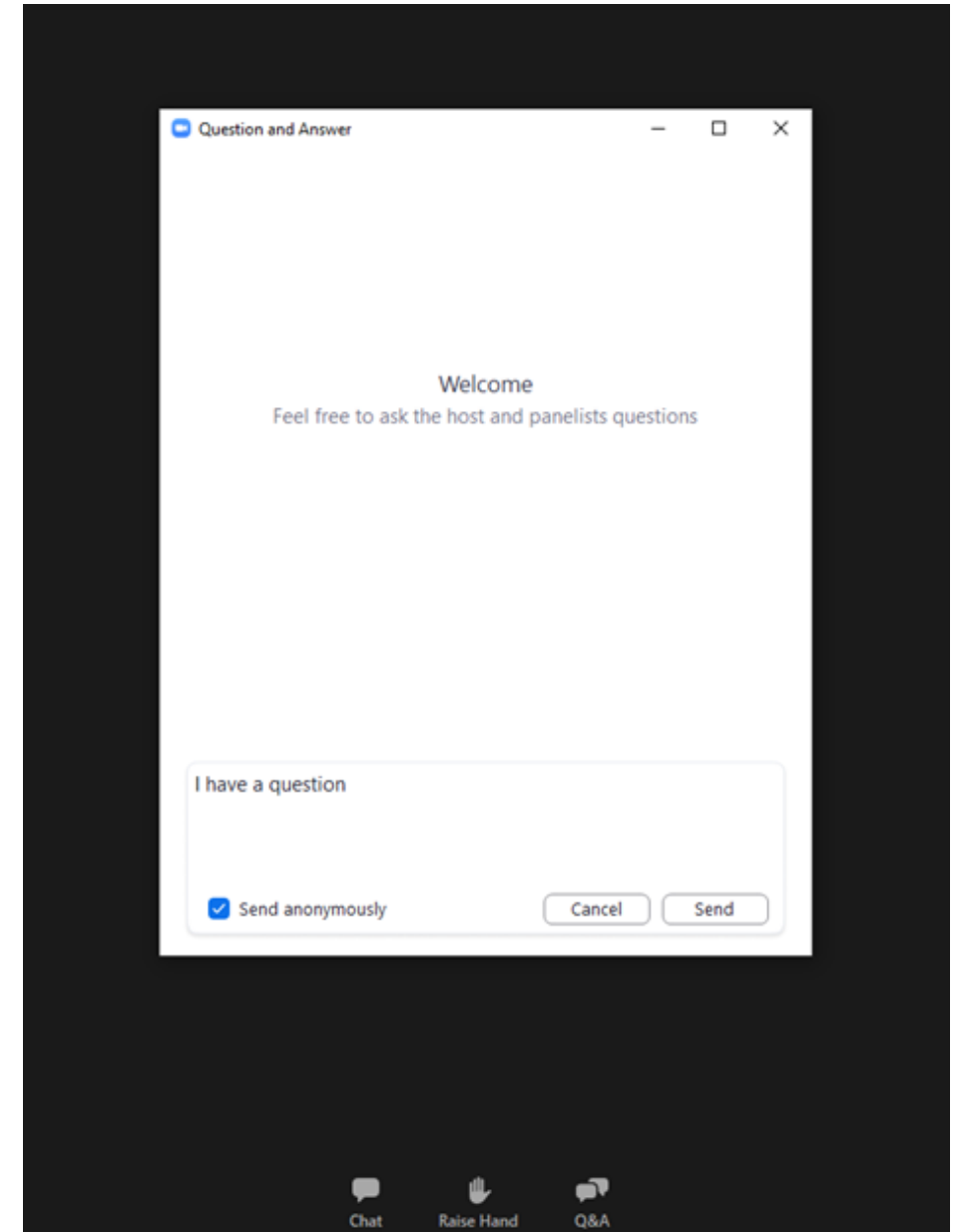
What are some examples of applying an equity lens, both internally and externally?

3

What are some important considerations of doing this work in a family philanthropy context, and challenges that are often faced?

Submit Your Questions

Submit your questions into the Q&A box on your control panel at the bottom of the screen or use the chat.





Webinar Logistics

- If you have sound problems listening through your computer, try switching to a landline telephone or cell phone.
- To ask a question, type it into the Q&A box on your control panel at the bottom of your screen or use the chat.
- If you experience technical problems, please use the question box or email jen.crino@ncfp.org. Should there be a broader technical issue, we will send an email and share a message on screen.
- This webinar is recorded and a replay will be made available to the field.
- You may chat with us on twitter during or after the webinar using the hashtag #ncfpweb.



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Adopting Equity Practices

National Center for Family Philanthropy
Webinar

October 13, 2021

About The Giving Practice

We blend customized solutions and deep knowledge of the field to help families, foundations and corporate funders navigate the changing landscape of today's philanthropy.



strategy



**equity
diversity
inclusion**

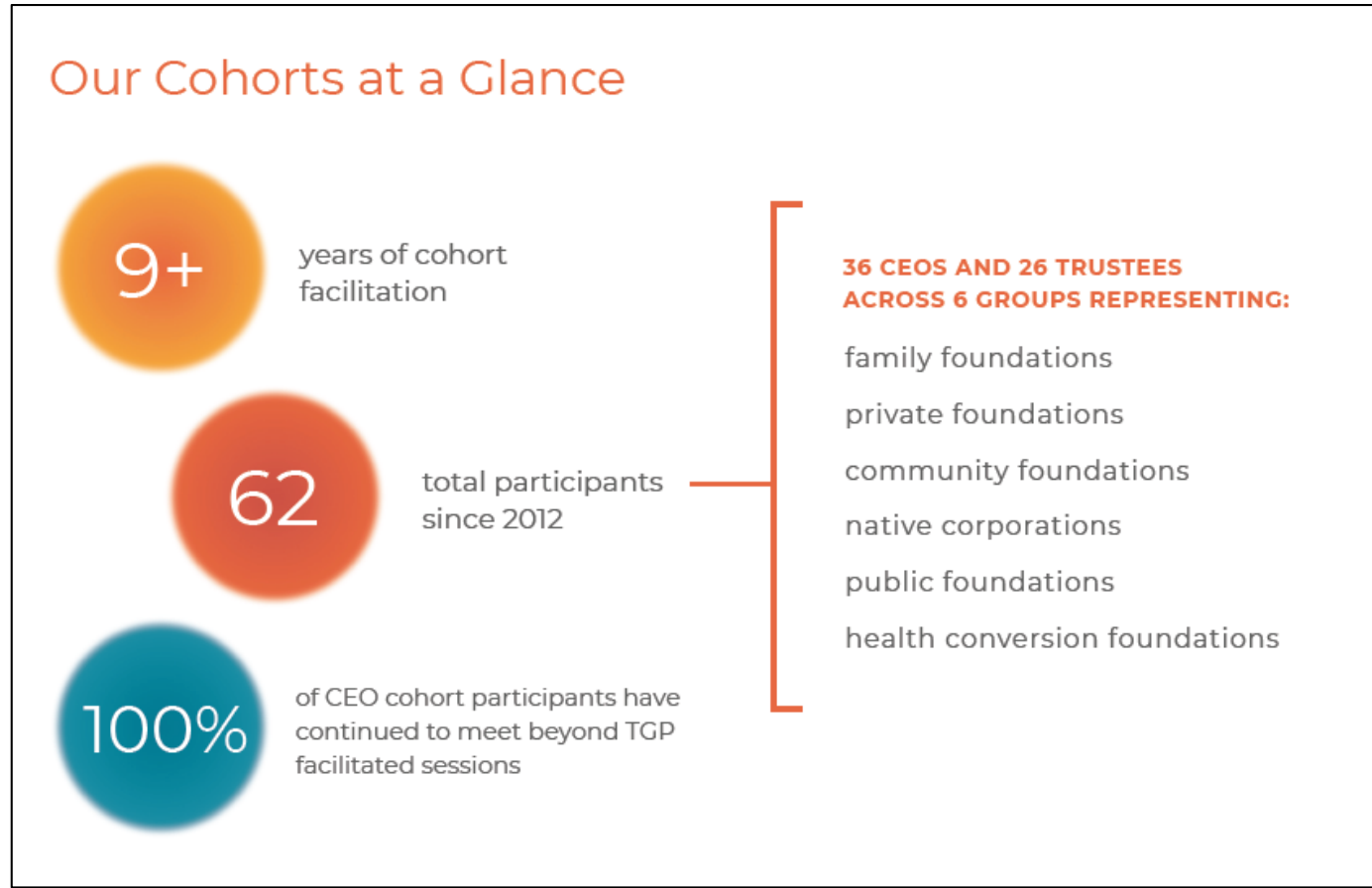


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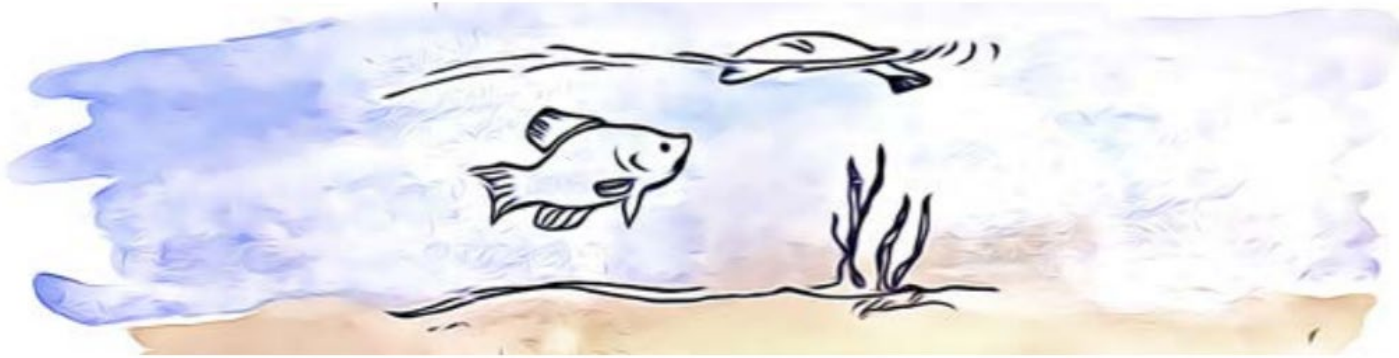


**leadership
governance**

TGP Cohorts: CEO and Trustees on Racial Equity



An Increasing Focus on Structural Racism



Artwork by Jojo Karlin (jojokarlin.com)

Things are not getting worse, they are getting uncovered.

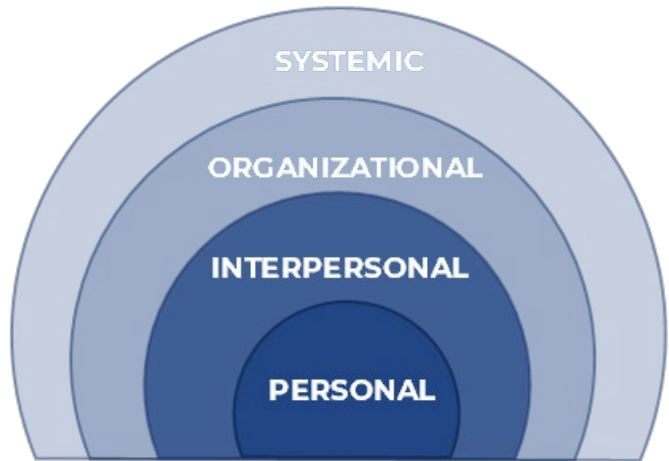
We must hold each other tight and continue to pull back the veil.

Adrienne Maree Brown

Our Approach: Transformation on Multiple Levels



Our Approach: Transformation on Multiple Levels



Personal: Inner work on privilege, bias, power

Interpersonal: Working across difference, being an ally

Organizational: Practices in culture, strategy, operations

Systemic: Addressing root causes of inequity

Organizational Practices to Center Racial Equity

Organizational Practices

- 1 Values and Vision Alignment
- 2 Equity-based Practices
- 3 Internal Policies and Practices
- 4 Create a Learning Culture

Values and Vision Alignment

- Establish shared language and definitions
- Establish a core set of values and fundamental beliefs
- Set a vision for where you are headed and what will change

Continuum on Becoming an Anti-Racist Multicultural Organization					
MONOCULTURAL ==> MULTICULTURAL ==> ANTI-RACIST ==> ANTI-RACIST MULTICULTURAL					
Racial and Cultural Differences Seen as Deficits ==> Tolerant of Racial and Cultural Differences ==> Racial and Cultural Differences Seen as Assets					
1. Exclusive	2. Passive	3. Symbolic Change	4. Identity Change	5. Structural Change	6. Fully Inclusive
An Exclusionary Institution	A "Club" Institution	A Compliance Organization	An Affirming Institution	A Transforming Institution	Anti-Racist Multicultural Organization in a Transformed Society
<ul style="list-style-type: none"> Intentionally and publicly excludes or segregates African Americans, Native Americans, Latinos, and Asian Americans Intentionally and publicly enforces the racist status quo throughout institution Institutionalization of racism includes formal policies and practices, teachings, and decision making on all levels Usually has similar intentional policies and practices toward other socially oppressed groups such as women, gays and lesbians, Third World citizens, etc. Openly maintains the dominant group's power and privilege 	<ul style="list-style-type: none"> Tolerant of a limited number of "token" People of Color and other social identity groups allowed in with "proper" perspective and credentials May still secretly limit or exclude People of Color in contradiction to public policies Continues to intentionally maintain white power and privilege through its formal policies and practices, teachings, and decision making on all levels of institutional life Often declares, "We don't have a problem." Monocultural norms, policies and procedures of dominant culture viewed as the "right way" business as usual Engages issues of diversity and social justice only on club member's terms and within their comfort zone. 	<ul style="list-style-type: none"> Makes official policy pronouncements regarding multicultural diversity Sees itself as "non-racist" institution with open doors to People of Color Carries out intentional inclusiveness efforts, recruiting "someone of color" on committees or office staff Expanding view of diversity includes other socially oppressed groups <p>But...</p> <ul style="list-style-type: none"> "Not those who make waves" Little or no contextual change in culture, policies, and decision making Is still relatively unaware of continuing patterns of privilege, paternalism and control Token placements in staff positions: must assimilate into organizational culture 	<ul style="list-style-type: none"> Growing understanding of racism as barrier to effective diversity Develops analysis of systemic racism Sponsors programs of anti-racism training New consciousness of institutionalized white power and privilege Develops intentional identity as an "anti-racist" institution Begins to develop accountability to racially oppressed communities Increasing commitment to dismantle racism and eliminate inherent white advantage Actively recruits and promotes members of groups have been historically denied access and opportunity <p>But...</p> <ul style="list-style-type: none"> Institutional structures and culture that maintain white power and privilege still intact and relatively untouched 	<ul style="list-style-type: none"> Commits to process of intentional institutional restructuring, based upon anti-racist analysis and identity Audits and restructures all aspects of institutional life to ensure full participation of People of Color, including their world-view, culture and lifestyles Implements structures, policies and practices with inclusive decision making and other forms of power sharing on all levels of the institutions life and work Commits to struggle to dismantle racism in the wider community, and builds clear lines of accountability to racially oppressed communities Anti-racist multicultural diversity becomes an institutionalized asset Redefines and rebuilds all relationships and activities in society, based on anti-racist commitments 	<ul style="list-style-type: none"> Future vision of an institution and wider community that has overcome systemic racism and all other forms of oppression. Institution's life reflects full participation and shared power with diverse racial, cultural and economic groups in determining its mission, structure, constituency, policies and practices Members across all identity groups are full participants in decisions that shape the institution, and inclusion of diverse cultures, lifestyles, and interest A sense of restored community and mutual caring Allies with others in combating all forms of social oppression Actively works in larger communities (regional, national, global) to eliminate all forms of oppression and to create multicultural organizations.

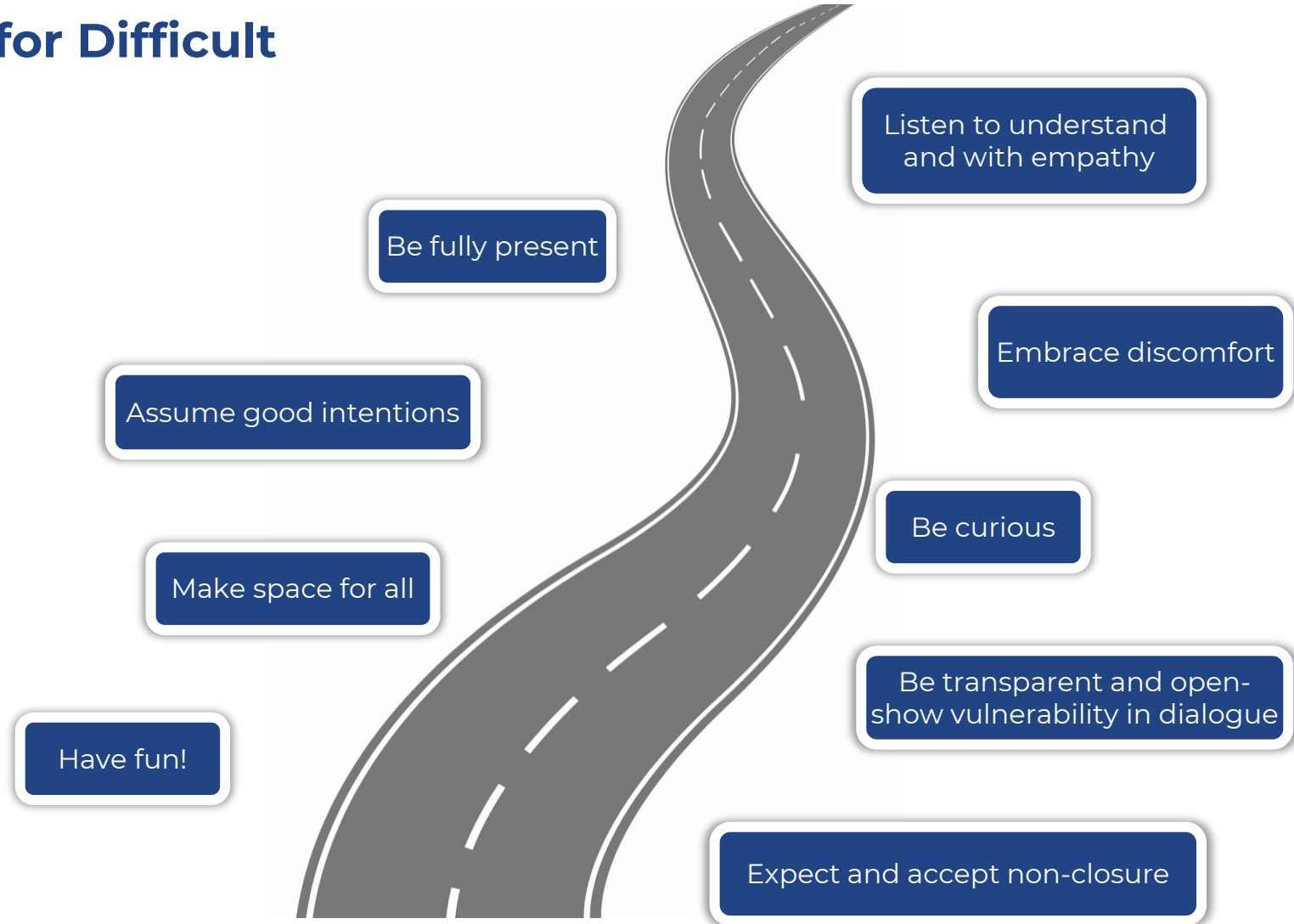
© Crossroads Ministry, Chicago, IL. Adapted from original concept by Bailey Jackson and Rita Hardiman, and further developed by Andrea Avazian and Ronice Branding, further adapted by Melia LaCour, PSESD.

Equity Maturity Model (EqMM) Overview



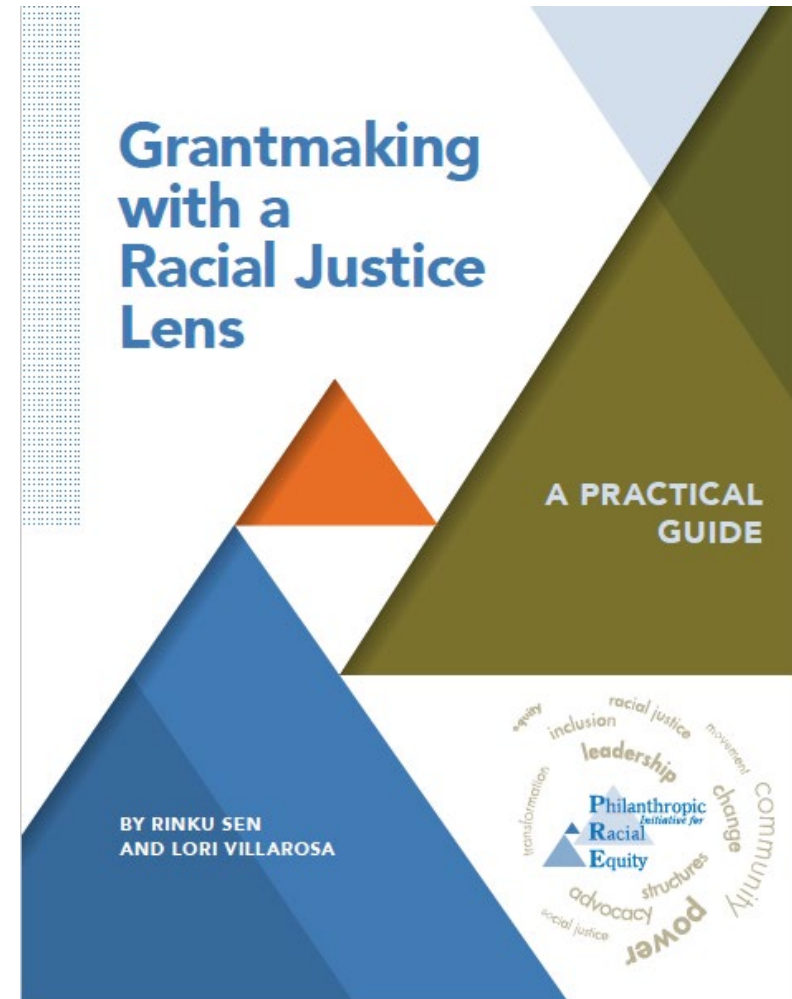
Focus	Dimensions and High-Level Descriptions
UNIFIED STRATEGY	Aligned Investments: Organizational priorities consider root causes and direct consequences of systemic inequity
	Reinforcing Programs: Opportunities for staff learning and connection on equity issues occur regularly
EQUITABLE PROCUREMENT	Fair Consideration: The impact of historical inequity is a factor when choosing contractors and service professionals
	Informed Selection: Equity-related criteria are embedded throughout the sourcing process
DELIBERATE PARTNERSHIP	Active Advocate: Convening power is used to engage others on equity issues and invite input
	Engaged Collaborator: Cooperative efforts occur with funders and other partners whose objectives are aligned
EXPLICIT COMMITMENT	Shared Language: Equity terminology and message are clearly defined and broadly communicated <small>Detail shown on reverse side</small>
	Evaluative Discipline: A standard equity data collection process exists, along with routine inspection for insights
VISIBLE ACCOUNTABILITY	Transparent Orientation: Beliefs and priorities regarding the resolution of inequity are publicly shared
	Dedicated Oversight: A governing body monitors performance and provides routine status/progress updates
INCLUSIVE CULTURE	Open Mindset: Increasing diversity is an explicit goal and differences are celebrated
	Courageous Leadership: Principles of equity are demonstrated top-down and influence performance appraisals

Alignment: Norms for Difficult Conversations



Equity-based Funding Practices

- Commit to learning alongside communities (they are the experts)
- Build power and self-determination in communities of color
- Explore new grantmaking approaches
- Take time to build trust and relationships with the community
- Bring voices with lived experience into foundations



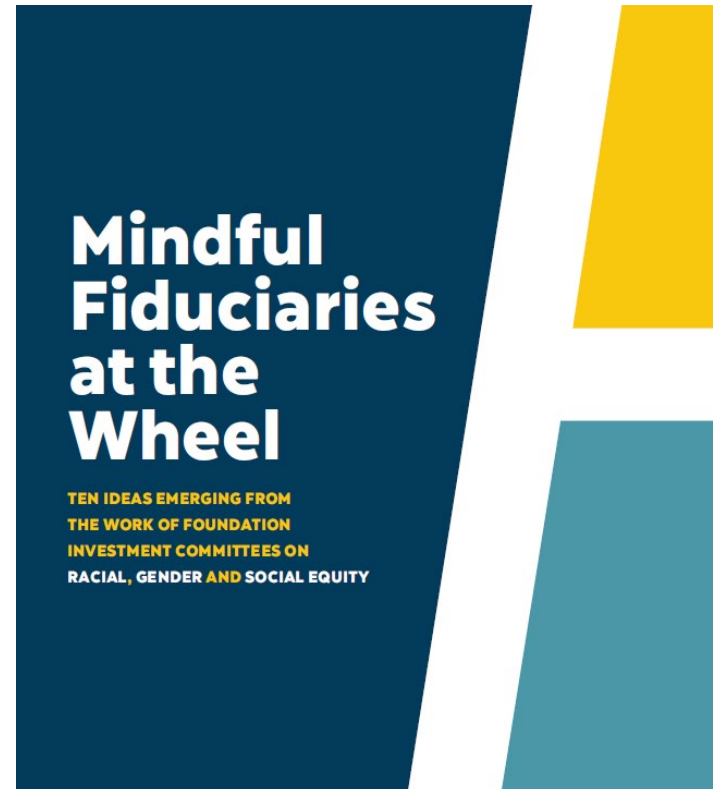
Equity-based Funding Practices

- Multi-year, unrestricted funding
- Simplify and streamline paperwork
- Do the homework
- Solicit and act on feedback
- Be transparent and responsive
- Offer support beyond the check



Equity-based Investment Practices

- Remove silos between programs and investment
- Examine the story of your foundation's wealth
- Diversify investment committees and investment managers
- Explore new approaches for using all forms of capital



Example: Satterberg Foundation

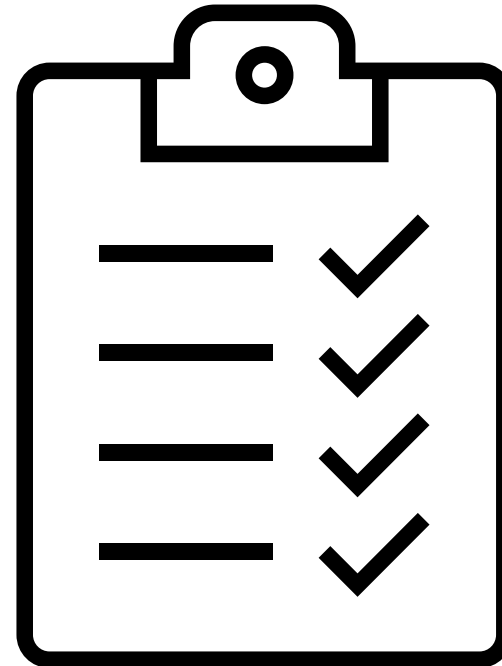
Operating Beliefs

Operating beliefs are SF values in action, the ways SF board and staff understand the approaches we take to best address the context of our current moment.

- Trust-Based Philanthropy
- Reparations Approach
- Equity Commitment
- Applying All Our Capitals
- Advocacy / Amplifying Community Voice
- Interconnectedness

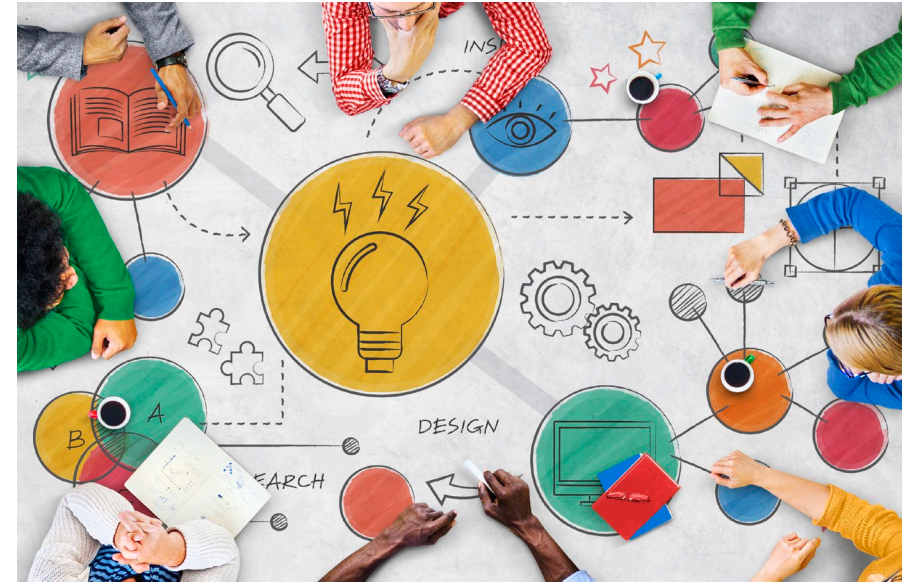
Internal Policies and Practices

- Conduct audits and assessments to gather information on current practices and culture
- Review internal policies with an equity lens - HR, operations, employee policies

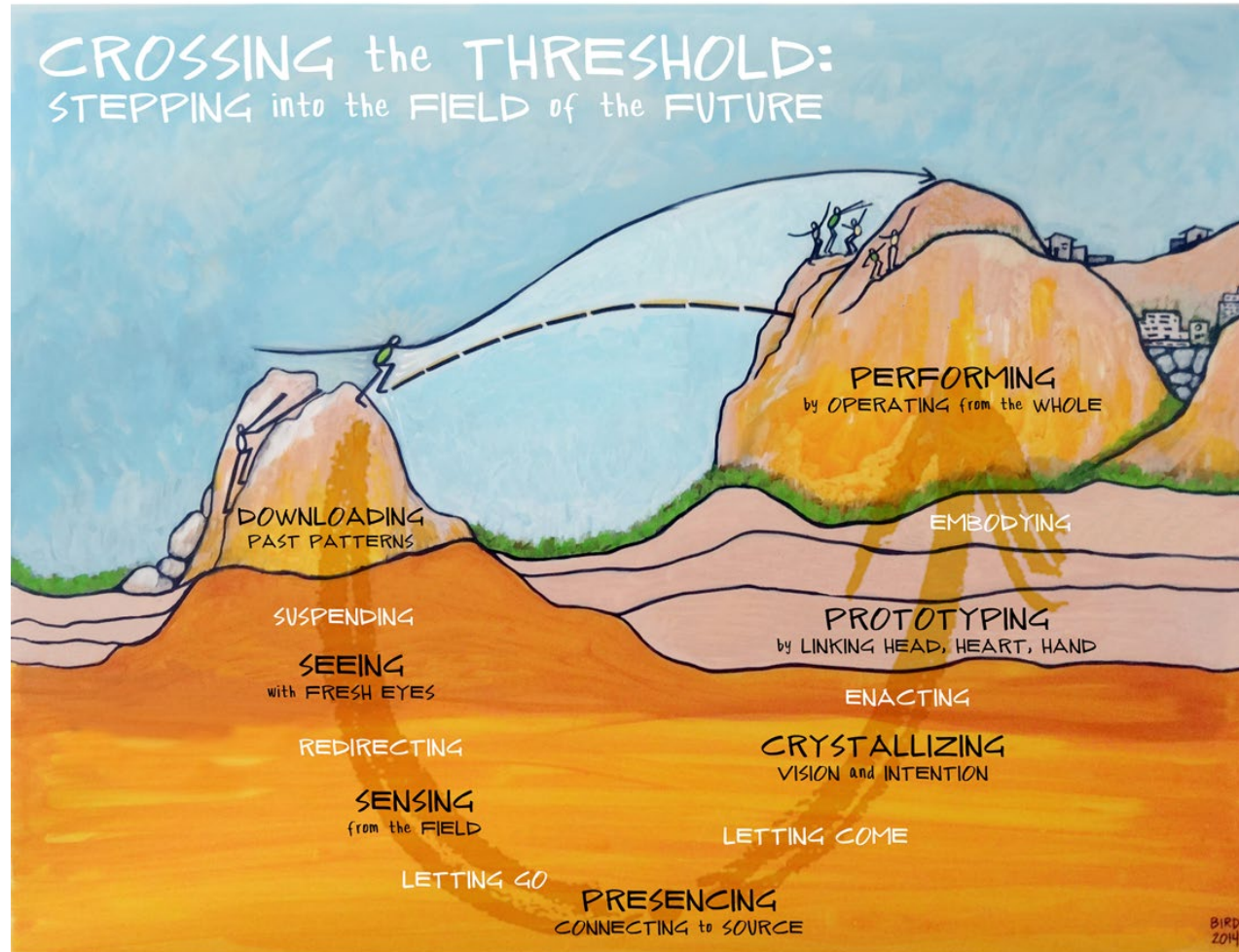


Create a Learning Culture

- Carve out space and time for reflective conversations and learning
- Internal culture building to promote collaboration, trust, and relationships
- Explore equity-based models for evaluation and learning with grantee partners
- Ongoing testing and learning new approaches



Creating a Learning Culture



Discussion





Next Fundamentals of Family Philanthropy webinar

Engaging the Next Generation

November 10 from 12-1:15pm Eastern

- In this webinar, learn how to strategically engage the next generation in family traditions, legacy, and culture, and explore when and how to promote formal philanthropic engagement at different ages and stages in the development process.



Racial Justice

IN FAMILY PHILANTHROPY SYMPOSIUM

December 13-14, 2021

The Symposium is a two-day virtual learning opportunity for family foundation board members, CEOs, senior staff, and next-gen family members seeking to deepen their knowledge around racial equity frameworks and practices. Topics include:

- Navigating family conflict about racial equity issues
- Committing to racial equity and justice as individuals and a collective
- Adopting principles and practices across your management and operations
- Diversifying your governance structure
- Sharing power and decision-making authority with community



Join a Peer Network

Peer networks are for those interested in connecting to family philanthropy colleagues with similar objectives, challenges, and shared experiences.

**Engaging Youth | Non-family Staff |
Strategic Lifespan | Board Chairs**

Email Katie.Scott@ncfp.org to learn more and join.



Thank you for joining!

NCFP will send a recording and related resources for the webinar to all attendees.

Please complete the webinar evaluation survey that will appear after the end of this webinar. You may also send your comments and testimonials to ncfp@ncfp.org.

