Adopting Equity Practices

A *Fundamentals of Family Philanthropy* webinar recorded on October 13, 2021.
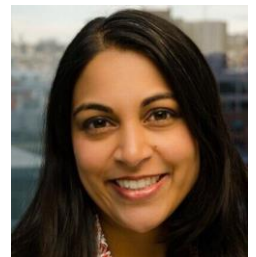
NATIONAL CENTER FOR FAMILY PHILANTHROPY

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Adopting Equity Practices

Transcript of the Fundamentals of Family Philanthropy webinar, Adopting Equity Practices. Recorded on October 13, 2021.

Nick Tedesco:

My name is Nick Tedesco, and I'm the President and CEO of the National Center for Family Philanthropy. Thank you for joining us today for our monthly *Fundamentals of Family Philanthropy* webinar. This series provides guidance on the core tenants of effective family philanthropy, from motivations and values to governance, grantmaking and succession. The series is designed to equip philanthropic families with the latest information on evergreen topics and the donor life cycle through practical takeaways and diverse families stories that illustrate important practices.

Today, we're going to explore the topic of how to adopt equity practices. There is an increasing recognition and understanding of the deep-seated structural inequities within the philanthropic sector and all of our systems. Donors are moving away from the idea of racial equity and social justice as funding areas, and instead conceptualizing equity as a lens that spans grantmaking, governance, management and operations, and many more. In today's webinar, we'll explore three critical questions. The first, what does it mean to adopt racial equity practices throughout your organization? The second, what are some examples of applying an equity lens both internally and externally? And lastly, what are some important considerations of doing this work in a family philanthropy context, and what are some of the challenges that are often faced while doing this work?

Before we begin, let me briefly share about our webinar technology. We want this webinar to be interactive. So please submit questions for the panelists. To ask a question, please use the question box as indicated on the current slide. When sending in a question, if you wish to remain anonymous, please indicate that. As a reminder, this webinar is being recorded and a replay will be made available to all attendees. If you experience any technical issues, please reconnect the technology or email jen.crino@ncfp.org. And as always, you're welcome to chat with us on Twitter about today's webinar using the hashtag #ncfpweb.

Now, let's get into the program. I am so grateful to be joined by three incredible leaders today. I'm very excited to introduce our panel. Today we're joined by Erin Kahn, the Director of Strategy and Programs of The Russell Family Foundation and the Principal of Erin Kahn Consulting. Sindhu Knotz, Interim Managing Director of The Giving Practice. And June Wilson, Principal of Central Insights and Executive Director Emerita of the Quixote Foundation, as well as an NCFP fellow, and someone who has helped guide me through an exploration on equity and justice. So I'm so thrilled that we are joined by these three incredible women, and I am excited for the conversation.

So Sindhu, I'll turn it over to you, and I know that we're going to begin with a brief presentation on adopting equity practices and then move into a full panel discussion. So again, thank you for joining us, and Sindhu, I'll hand it over to you.

Sindhu Knotz:

Thank you, Nick. Hi everyone. I'm Sindhu Knotz. I'm Interim Managing Director at The Giving Practice. I'm delighted to be here today. I want to thank NCFP for inviting me and I'm also delighted that June and Erin are joining us. For those of you that don't know us, The Giving Practice is a national consulting group based in the Pacific Northwest. We work with all types of vendors, including many family foundations, and we work on strategy, facilitation governance and increasingly equity, diversity inclusion in almost every project we have.

Over nine years ago, we started hosting cohorts for CEOs who are grappling with embedding racial equity into their work, and we added trustee reports two years ago. And we found through these cohorts that racial equity work is as you know, much more complex than other leadership issues, and peer cohorts can be really transformative and help them to navigate that terrain. Much of what I'm going to talk about today will be drawn on some of these conversations and also the conversations we're having in our consulting about the complexity of adopting racial equity practices across an organization. And then of course, we'll have June and Erin to join us for a discussion about really specific family foundation practices.

So a decade ago when we started this work with cohorts and with leaders, the discussions around equity were really in a different place. Many funders were just getting started. The language was around diversification of boards, building inclusive practices. Over the years, we've seen a shift into a much more explicit focus on racial equity, not only as a lens for grantmaking, but also a way of grappling with our role, philanthropy's role in addressing structural racism. There's now broad acknowledgement that philanthropy was built on deep-seated, structural inequalities and racism in our institutions and systems.

I included this image of this fish because I love the metaphor that structural racism is the water we swim in, and it won't help us to just ask why the fish are dying because they are being poisoned by the groundwater in the lake. Philanthropy is now looking at the root causes of these inequities, especially in black and indigenous communities. And I also love this quote, "Things are not getting worse, they're just getting uncovered. We must hold each other tight and continue to pull back the veil."

I just wanted to say a quick word about our approach, which is to address transformation on multiple levels simultaneously. We know that if change will happen, it's happening at all of these levels and there's a dance between these levels at all times. The personal work, inner work on privilege, bias, reflecting on where we have power as individuals, embracing courage, humility, and vulnerability. Interpersonal work of working across difference, learning from others and being an ally. Organizational practices to sustain racial equity and strategy culture operations. And this is where we'll focus today. And lastly, addressing the root causes of inequality in philanthropy, how can philanthropy shift power and change systems.

Today we'll focus specifically on organizational practices and here are some examples. And again, there's so much to say, so we'll just draw out a few things and get into our discussion. I'm going to focus today on balance and vision alignment, equity-based practices, internal policies and practices, and creating a learning culture.

The first step in this work is often what we hear to align on values and vision. We've worked with many groups who think they're aligned, and then they start to step into the work and get a little bit down the road and realize they need to slow down and get more clarity on definitions and shared language, the values that they all hold, and then how they can set a vision for where they're heading. I included a few

tools here that we've used with groups. I don't think that there's any one perfect tool. I think there's often tools that can customize to context, but the idea is to really help groups, help your group align around where you think you are and where you would like to go, and what are the things that you need to do culturally, strategically, operationally to get there. So setting that course for yourselves as groups.

Another critical step is to establish group norms. Norms are the guardrails for difficult conversations, creating spaces where disagreement and conflict is okay and actually valued, where we can embrace discomfort, be curious, be transparent and show vulnerability. We often use norms like accept and expect non-closure for groups who are working with a sense of urgency and want to get to an end-point, but often have to embrace some of the messiness in the process. We find this as very helpful in family foundations, also where the rules are very complex and the relationships can be complex. So helping to set some guardrails for the conversations and also building the muscle internally to name when you see norms that are not being held by a group. Sometimes we ask groups to nominate someone to watch the process of a meeting and at the end share where we looked into the norms and where we didn't.

There is so much to say about funding practices and how they're shifting. I wanted to start with a few principles of things we are hearing more and more frequently from our funders and partners. The first is to commit to learn alongside communities. They are the experts. They know what they need. This often is a recognition that communities on the ground, partnering with them will lead to more sustainable solutions in the long run. Related to this as building power and self-determination, particularly in communities of color. I just heard a great example from the Sapelo Foundation in Georgia, who prioritizes power building policy advocacy in grassroots organizing to do this. And the idea is if we are all going to dismantle systems of oppression in healthcare and in housing and criminal justice, we can't do this unless we use our funding to create mobilized shifts on the ground and shifting centers of power.

Exploring your grantmaking approaches like participatory grantmaking, trust-based grantmaking. I will talk a little bit more about trust-based grantmaking in a minute. Taking time to build trust and relationships with the community. One thing we often hear is that this is a different type of work than the traditional program officer role. So really building a new skill sets, carving out time to build those relationships in community. And lastly, bringing voices in with lived experience. And there are different ways to do this, diversification of staff and board is one way, but also really creative ways of grant advisory committees, where decisions are actually being made by community members with the most lived experience. And Meyer Memorial Trust is a good example of a foundation that is starting to do this where they're creating grant committees where community members actually are making the decisions.

I just mentioned trust-based philanthropy, and I'm introducing different tools and some of the graphics here just because there's so much out there. And one of the common things you'll hear in the field right now is creating more trust in these relationships. And this includes practices like multi-year unrestricted funding. For decades we proved this is what communities want, large unrestricted multi-year funding with flexible restrictions. Simplifying and streamlining paperwork so that grantees don't have to spend an inordinate amount of time on paperwork doing the homework. So a funder's responsibility to get to know the grantees versus the grantees' responsibility, soliciting and acting on feedback, informing your work by the lived experience of community partners, being transparent. So building relationships that are rooted in trust and accountability. And lastly, offering support beyond the paycheck. So responsive, adaptive, and non-monetary support to bolster leadership and capacity.

We often talk a lot about programs and grantmaking, not about work on the investment side. So breaking down the silos between learning around racial equity in both programs and investments is a

first start and equity based investment practices. Our colleague Rosalie Cate's publication called Mindful Fiduciaries at the Wheel. And in it, she talks a lot about how investing success is no longer just about financial returns. Investing success is also about getting capital into the hands of people in the communities that have been harmed by our economic systems. So really flipping the narrative and the script on the purpose of investment committees and our dominants. Examining the story of foundation's wealth. Part of this is really doing the work to think about the origins of the wealth and have this shift a sense of what fiduciary responsibility really means. If the wealth was created in extractive ways, does this give all of us a deeper sense of responsibility to give back and invest in assets in those communities.

Diversification of investment committees and investment managers. We know that diverse professionals make different decisions and are awesome. We're connected to the communities where the resources are needed. And lastly, exploring new approaches for using all forms of capital. So MRIs, PRIs investments, but also non-monetary assets, reputational capital, social capital, and technical assistance.

A colleague of ours in the Northwest where we're based, Satterberg Foundation as some of you may know, has adopted many of these practices, so I just wanted to use them as an example. These are their operating beliefs. They spent many meetings and an iterative journey to get to this set of beliefs through facilitated conversations. They've adopted trust-based philanthropy. So they do give large unrestricted grants. They're taking a reparations approach, meaning they went through a process to examine the narratives of their family's wealth. And they've committed as a family to return resources back to the community. They've also committed to a 10% annual distribution when they tend to spend down over several decades.

Their equity commitment is a narrative about centering communities that are most impacted by systemic racism. They also have committed to applying all of their capital and amplifying and advocating through taking public policy positions and encouraging them to do the same. And lastly, their family value of interconnectedness is something that they have intentionally decided to bring through all of their participatory grantmaking, their power sharing and collaborating with peer funders.

Internal policies and practices. There is so much here, and we'll talk more with Erin and June about some of this, but I just wanted to mention that first, many of the groups we work with do audits and assessments to gather information on their current practices and then develop a plan on where they could really implement more of a racial equity lens. Some use intercultural inventories, other equity audits. Some do staff and board surveys. Some of the specific practices that we've seen or heard about are in HR, in recruiting, thinking about valuing lived experience, for example, over formal education, really looking at employee policies, increasing diversity on family boards by creating tenure limits and bringing non-family board members, doing full audits of operational policies and making sure that all accessibility and other forms of equity are included, looking at the diversity of vendors. There's just so much here. I'm not going to go through an exhaustive list and we'll talk about this a bit more, but really thinking about how can racial equity strategies we included in all aspects of foundation operations, and also lastly, decentralized leadership models, we're also hearing more about how can leadership and decision-making be more decentralized.

Lastly, I wanted to talk a bit about creating a learning culture. Some of the work that we've done has shown us that the adage that "culture eats strategy for breakfast" is true, carving out space and time and creating reflective conversations for a culture of learning throughout this. It is not easy work as you all know, and it takes deep trust and relationships both internally and externally with partners, also

looking at different models for evaluation and learning with grantee partners that are based on equity and testing and learning new approaches.

We love this slide from Otto Scharmer at MIT, Theory U, some of you may have seen this. Many of the groups we work with want to start from point A and get to point B. So that's the person you see jumping across to the rock saying, I want to get to the other side. And yet there's this whole process that as humans, as organizations and as a collective community, we have to go through, which is suspending, seeing, sensing, letting go, presencing. So we call this descending into the view and at the bottom of view is the messy, uncomfortable space of really grappling with our history, our relationships, our own bias, things that we know we need to change personally and organizationally, and as a community of funders.

And then you move up view, which is prototyping, enacting, and finally performing. So it often takes longer than we'd like. And there's always that balance of urgency and patience, but we find this a helpful frame. Many groups feel like we're not getting there quickly enough, but also recognizing that there's a process to go through.

I'd like to invite Erin and June to join me. I've worked with both of them in different capacities over the years, and there're such strong leaders and I'm so delighted they're here. Hello.

I'm going to start by asking both of you, and I'll start with you June, can you share a little bit about the work you're doing now, your background with family foundations, and then also thinking about the Quixote Foundation, tell us a little bit about the arc of the journey there?

June Wilson:

Sure. So currently I'm doing some consulting work and some of that includes with NCFP and other family foundations. Sorry, my brain just went right to the next part. And that work that I'm doing is really around the diversity, equity and inclusion and helping folks really grapple and understand both the anti-racists framework and how to incorporate deeper listening and learning and the work that they're doing so that they can transform the ways in which they engage and how they think about their values, that norms, all the things that you've talked about, really working with them on a process to go from learning to really activation and change. And that just takes time. It's a long, slow process often.
I worked at Quixote Foundation and helped the foundation close the organization. I worked there from 2007 to, we closed in 20... Our last grants were out the door in 2017 and we closed in 2018. Should I pause there? I can go into a little bit of that work.

Sindhu Knotz:

Well, let me have Erin introduce herself and I'll come right back to you.

Erin Kahn:

Thanks Sindhu for framing this session today and I really appreciate your, everything you've covered in those slides kind of touches on everything I've been thinking about in preparation for this conversation. My name is Erin. I am currently the Director of Strategy and Programs at The Russell Family Foundation, which is a family foundation based in Pierce county, Washington. And prior to that, I led The Raikes Foundation, a private family foundation in Seattle for 12 years. When I started there, I was the first

employee. And by the time I left, we had a team of 16 people and our budget had increased five fold. So most of what I'll be drawing on today really comes from my time at Raikes as a director there and the real transformative work we underwent an organization during my tenure, and that continues today. I left Raikes in 2019 to become an independent consultant. And so, half of my time, in addition to my role at The Russell Family Foundation is as a consultant. And I would say that most, I have a handful of executive coaching clients that are executive directors of private family foundations. And in all of those cases, work around equity and how to navigate that, particularly with their boards and trustees, comes up all the time. And so I feel like no matter what kind of organizational hat I'm wearing, thinking about DEI work is really central to what organizations are doing lately and over the last many years. And so I just am grateful to share a little bit of what I've learned and I'm still learning.

Sindhu Knotz:

Thanks, Erin. Jane, let's pick back up where you were just about to jump in. Tell me a little bit about the arc of the journey at the Quixote Foundation. And I'm really interested in how did you land on where the focus was and what did you do to get to that point?

June Wilson:

Yeah. When I came to Quixote in 2007, I came in as operations director and then we moved to a co-ED model by 2010, and then I became the executive director in 2012. And I set that framework because when I came to Quixote, a lot of the principles and practices that you've talked about Quixote was doing. So we really looked at alternative models for how we would lead the organization. We really were, all of our grants general operating support at the time, we had some project support, but the bulk of our grants were general operating support. We simplified the processes by which folks would apply. So we were already applying some principles that are key to equitable relationships, but we were not at all able to be engaged in a conversation around race.

And there were a little pieces that will come up that I could see certainly as a black woman that made me deeply uncomfortable. And I knew that the organization really had to begin to think about and look at race specifically as a lens. At that time, we certainly were conscious and aware of a gender framework, but we were not in any way talking about race. That was not on the table. And in fact, I as a leader often could see that there were racialize lenses that we were not… both implicit and explicit racism that was going on, and we couldn't see it. And it was very difficult for me to engage in a conversation without really having the organization go on a deep journey.
And so we began that process in I would say 2014, 2015, but prior to that, it would take two years of my questioning of that around the gaps before I could even bring it to the table. And I say this because I think it's really sometimes the burden that directors of color or folks of color in organization hold. They can see something and it's difficult to find a way to weave it in, particularly when your job is on the line.

Sindhu Knotz:

Thanks, June. Erin, were you going to comment?

Erin Kahn:

Sure. Kind of thinking back to my time at Raikes, there was really a kind of catalytic moment in the organization. It was probably back in around 2015, 2016. We hired someone on our team who had part

of their role was a program officer and like 10% of the role was going to be to advise and advance our work on diversity, equity and inclusion, which now I think back of that construct like, oh 10% of your time, which is just sort of bananas, but I didn't know it, I didn't know it then. But one of the things that happened early on was that there was this Charleston Church massacre that had happened, and someone on our team, a black woman on our team kind of shared with the group that how upsetting and, that's a mild way to put it, how deeply traumatic that incident was and how it was affecting her and her thoughts about her life and her motherhood and all kinds of things.

And she really challenged that the organization wasn't talking about it and how that made the organization, how she experienced the organization as a result of our failure to even hold space, and me as a leader to hold space amongst our team, about what was going on in our country racially at that time. And instead of hearing that from a place of empathy, I really took issue with some of the criticism she had about our organization and our organizational culture. So I responded to that totally inappropriately in a way that was super harmful and probably caused irreparable damage to my relationship with that employee. But what it led to was the realization that in order for our organization to move forward on racial equity work, we had to have a common understanding of what the heck we were talking about. And my behavior in that moment demonstrated that I didn't understand well enough to be leading the organization in that way.

So we ended up doing an intensive three-day training that involved our trustees. It was three sessions, six weeks apart. And back to total basics, like the history of our country, what is racism, what is oppression, how has this built into everything we do? It was a really profound learning experience for everybody on our team, recognizing that we were all coming from different places in terms of knowledge and lived experience. So the people of color on our team surely experienced that training differently than I did or other white people on our team, or our trustees did. But I felt like that kind of coming to a place where we have a shared understanding, shared language and some sort of basic assumptions about why things are the way they are, that became a sort of foundational experience from which we can then kind of move forward and grow and build and start to shift the way we worked. And I think that one of the other big "aha" moments for me from that early experience was, I think I had really been thinking about DEI work really through the lens of grantmaking, and what became apparent was that I really needed to be thinking about everything we do as an organization, our culture, our systems, our practices, how we share leadership, how we include people, all kinds of... I had a much fuller featured sense of what bringing a racial equity lens could mean to our organization, and that I took forward, but it really, I think it was really that sort of beginning painful experience that led to the realization that we needed to do things kind of deeply and differently so that I certainly, as a leader, didn't repeat the harm I had done initially.

Sindhu Knotz:

Thanks Erin for sharing that. And June, I'm curious after hearing what Erin just said too, how did the board that you were working with shift from gender to racial equity? What process did you go through to get there, to be more of a focus on race?

June Wilson:

We brought in a consultant, because initially I was like, we have to do this work. So I started taking the board and the staff through a process. And then I was like, oh, wait, I'm outside of the work. I was like, I have to be inside of this if something's going to change. So we brought in an outside consultant. And

from really 2014 to the time the organization closed, we committed to meeting once a month for over two and a half day process, working deeply together to really understand our history, to understand structural and systemic racism, to understand power and privilege, what it meant for the great work we thought we were doing at the time with our grantees. So it was a long process and I would certainly say the board came along in defiance. They were really not initially okay with it. I would say it took almost a year before some things began to shift.

Sindhu Knotz:

Can you talk a little bit about once the initial commitment was made, the commitment to learning, how did things start to shift and what shifted first? Did you start in your grantmaking, then did you move into other areas? Did you start internal culture? How did things start to roll out in terms of where you started and then ultimately getting into specific practices? Let's start with June.

June Wilson:

Oh, let's see. I would say we ultimately started from a real racialized lens and understanding. We made a commitment to really just look at the vendors that we were working with. It felt like a real concrete practical way to look at what we could shift. And so we really, Quixote did a lot of work bringing our grantees together. We were often engaged in conversation. We had regular caterers, regular consultants we worked with, and we really started to sort of, how can we work with catering companies or chefs of color, and what did that mean?

But what was interesting in that process, I remember we shifted to a particular chef. And when we got the food for our, it was like not exactly in the way that the organization was used to seeing things set up. And there was like nitpicking, like folks were nitpicking. It was like, first of all, the chef that we hired has no infrastructure. Like this is great, the food was delicious, but we were nitpicking what it looked like and how it was laid out. And that was like, there's a problem here. And so we began to look at, oh, we're going to do this. How do we go even deeper underneath? What are the infrastructure needs to begin to look at? Why are there gaps? Why did the food come and why was it sort of set up differently?

And until we could begin to kind of shift overall thinking, not just, okay, all we have to do is change the who, but the how also needed to be, what are the infrastructure supports that needed to change around that? So it meant that once we hired a chef, we kind of committed to him over time to try to help to see him grow. And that process, when we committed to kind of a consultant to engage with, we were looking at how we commit to them over time to build some infrastructure pieces. It wasn't enough to just change. And that's where we began. There's much more, but that's where we began.

Sindhu Knotz:

Erin?

Erin Kahn:

As I mentioned, we kind of did this really intensive, initial training, and that subsequently led to bringing in an outside consultant who helped us do some kind of an org assessment. We later on did learning circles as a team. We did individual coaching. Initially, I think some of the work we did together helped to sharpen our focus on our strategies. So, how does race implicate that the, how is it implicated in the

problems we're trying to solve, and how do we understand those problems with that lens. And that led to shifts in how we approached our grantmaking strategies. So there was that kind of conceptual component of it. And then we started from that org assessment work to really start to identify what are the things we want to change about our internal practices and our team and our culture and our hiring and all kinds of dimensions. And we started off with this really ambitious work, organizational work plan.

And then one of my learnings was that you kind of can't boil the ocean, things take time. And so over the years, we got better at trying to get clearer about what the three to five things we really wanted to try to shift in our organization. And one of the places where I can really see clear examples of that is in our asking staff for feedback, which seems like a really fundamental thing, but we got better at asking different kinds of questions. So rather than just sort of a traditional kind of staff surveys, we were asking questions about how people's sense of belonging and inclusion. And we were asking for feedback on our personnel policies and our benefits, which had really been developed with a certain mental model of like, who is the prototypical employee.

And so then when you have a more diverse team, you have different family structures, you have people from different racial backgrounds, you realize how kind of white normative or I realized how white normative and heteronormative our policies were. So we had a really inclusive team process to try and make changes to our policies and benefits. And that was just one example, but it was an example where previously it was sort of like, I would work with our COO and we make changes to the policies and then we kind of roll them out. And we were trying to move more to a policy of let's get input, let's ask good questions, let's actually have a committee that I wasn't even on that developed recommendations for how the policy should change and adapt.

And so I think we just took a lot more care around including staff in all kinds of different levels of the organization. It became less top down. And I think we were more attentive to the ideas about inclusion and belonging, and that shifted a lot about our organization. And I think we needed to continue to learn and seek outside input and kind of do individual work so that the way we came together as a team could be stronger. And so it was really, I think, a big commitment of time on our own as well as building in. I think like June mentioned, I think we had every other week learning sessions for a period of a couple years where brown bag lunch type of gatherings, where we would read something together and then reflect on it or watch a video and reflect on it. And over time that evolved, but I think making space for it also signaled that we were prioritizing that to the team. So that was important as well.

Sindhu Knotz:

That's really helpful, Erin. And I'm wondering, would you be willing to share a couple of specific either internal policies or practices that changed, and maybe it was something that didn't go well or maybe something that you sound went really well. I think it would be really helpful to hear just a couple of examples.

Erin Kahn:

Yeah. A couple of specific hiring, partly because of the work the organization was doing, we became much more explicit in our job descriptions that we were as an organization on a kind of journey to more deeply integrate racial equity into our work. And so we became more explicit in our framing of our job announcements, that that was an important part of what the organization was doing and that anybody that joined our team, that their kind of genuine engagement in that would be expected. And we were

more intentional in our hiring process about making room for conversations with candidates about that work. And so that alone led to a different composition in our applicant pools. I think naming it in our job description, stating it as a priority really shifted who is applying to our organization to begin with. That showed up differently in our interview protocols and how we compose teams to do interviews and things like that.

Another explicit practice change that we made actually was on personnel policies, was recognizing different types of partnerships, not just married, your spouse, your husband gets healthcare along with the employees. So we made a lot of changes to coverages that included non-traditional family structures. We made room for recognizing religious holidays differently. So some of the things that we just had kind of default and never really questioned, we kind of went through line by line and said like, well, who's really benefiting from this policy? Who might we be overlooking? How could we maybe think more broadly about how people live and how they work?

So we shifted to a more flexible work-from-home policy and that was pre-pandemic because people who, if you were affluent, you could live close to the office. If you weren't, you had to live further away. And having a sort of buts and seats requirement had implications for people that didn't work close to the office. And so just really, actually that one little example, you realize how kind of loaded even that choice of requiring everybody to come to the office, like who's included in that, and who's not. So I feel like we really kind of scrubbed a lot of our policies. And then there was a lot that took time. It didn't happen overnight to get what felt important to people kind of evolved.

Sindhu Knotz:

And Erin, we had a question from the participants. Did you use any internal audits or assessments in specific ones?

Erin Kahn:

We looked at a few different ones. I feel like we looked at the D5 assessment tool. What I think is useful about assessments is it can tell you what good looks like, because part of the challenge that I really faced as a white leader was I felt like I didn't know what good looked like. So I didn't know what the goal was, because I personally had never worked in a really inclusive organization. I had never had a person of color as a leader or manager. So I kind of led as a leader, just like the organizations I had previously been in. So I had no mental model of what a more inclusive, diverse, equity centered like, because I had never worked in one. And yet I was trying to lead our organization to that place.

And so, the assessment tools help to illuminate many different ways of looking at what equity can look like across different facets of your organization. And now in the field of philanthropy, there are so many more tools, there's so many more resources, there's so many more sessions every conference you go to. Back six or seven years ago when I was an ED, that was just getting, it was just starting to really blossom in the field of philanthropy. So I feel like it took a different kind of work to find the resources than it does now. But I think those assessment tools can be really helpful.

And I do think that outside consulting is irreplaceable because there are things that even when you feel like you being as open and honest and transparent and learning in public, there are still times where people won't speak truth to power and that's where outside consulting can help to say things that people don't feel comfortable saying or to put things on the table that might be hard for you to

recognize when you're from the inside. So somebody from the outside coming in can really be that neutral, bring forward observations that you can learn and grow from that it's hard to do just in a self-guided way.

Sindhu Knotz:

That's so true. And June, I'd love to hear either from the work you're doing consulting to family foundations or you work at Quixote, what specific practices have you seen really start to shift and that are gaining traction, things that you think have been working really well in terms of really integrating racial equity across internal operations policies? Oh, and you're on mute.

June Wilson:

The big conversation right now and that I'm hearing with families that I am advising is around diversifying the board. And that is huge because that's where so much of the power lies, decision making and ongoing power lies. And it is a very difficult process, particularly in family foundations because when there are boards where families, they say they have all the power. And to bring someone both outside of the family to be part of that is also difficult for the folks that you bring in to make sure that you've engaged in the process that supports your ability to really share power with others. And that takes some work and some process.

I think that has been really critical when families are able to do that. And frankly, next gen folks in family foundations, they are really pushing often the older gen families around this work and they are eager and ready and committed and want to learn and really are open to how to think about that. So that is one of the places that I'm seeing a lot of conversation and some momentum shifting broadly in the field. Quixote was a small board and it just had three board members and I sat on the board of Quixote in the last few years. So it was a different beast, but that's where I'm seeing the greatest shift.

Sindhu Knotz:

Yeah. And I'd love to ask you both, as you've moved in your leadership roles, as you were taking on these initiatives, what roadblocks or challenges did you face and what actions or steps helped you move through those moments? Maybe we'll go to you first, Erin.

Erin Kahn:

Well, certainly I felt like my own learning curve was a roadblock, honestly. I think that I didn't know what I didn't know, and has a lot of blind spots. I think that got better over time as we kind of did more learning together, I did more executive, got coaching of my own, and I had the experience, like I participated with you Sindhu in the CEO cohort, the DEI CEO cohort, and so learned a lot from peers. So that was really helpful. That kind of ongoing need in my leadership role to kind of pay attention and lean into that work.

I think that one roadblock we encountered was, honestly a couple employees who were having a really hard time with these pivots that our organization was making. And I think in one case in particular, it got to the point where I just had to say, "Hey, this is where we're headed. This is why it's important. This is how it's consistent with our organizational values around learning and growth and ongoing improvement. And I kind of need you to either decide that you're okay with that, or you're not. And if

you're not that's okay, but then this is not going to be the place you want to be." And that person did decide to leave the organization. And I think a while that's always hard to navigate. It was productive because allowed everybody else who really was curious and wanting to move forward and wanting to make changes, it gave us room to not be kind of dragging someone along with us.

I think one asset that we had and that I had, two important things, one had very brave people of color on my team who were willing to push me, who were willing to challenge, and really were patient with the organization, kind of sometimes what I'm sure felt like a very slow piece of change. And so I'm super grateful for that. And then I all also had trustees that had a lot of learning to do too, but approached it from a sense of, I'll share one very short story, that intensive three-day training that I mentioned. That proposal for that training I actually shared with my trustees, which was not a typical process. I could kind of unilaterally approve those things, but I actually shared it because the trainer described what we were going to cover, used language like white supremacy, which six, seven years ago, wasn't bandied about the way it is now.

I was terrified when I hit sent on that email. Like, I want to send this to them so they know what to expect. So they're not like what the heck is this, but I really didn't know at that time how they were going to react. And to their credit, one trustee in particular said, I sat down to discuss this proposal in a meeting. And he said, this seems like really hard work. And then he said, but if it's not hard, it's probably not worth doing. And I couldn't have asked for a better response from a trustee whose kind of perspective at that time I hadn't yet tested. And so I really appreciated that my trustees were willing to kind of lean into it, they were willing to learn, and they were willing to allocate resources for our organization to do the work that we needed to do.

Later, along the way, there were lots of points of friction, but I had a kind of starting point that it wasn't an uphill battle right out of the gate. I will say that's not true for a lot of people that I work with in my consulting role. Kind of as June alluded too, there can be a lot of resistance among boards in particular and that's where sort of patience and persistence I think can pay off. And some bravery from the staff to be willing to sort of challenge

Sindhu Knotz:

Yeah. Watching the transformation of your trustees over that period Erin was really amazing to watch. Thank you for sharing that. June, I'd love to hear from you a little bit about roadblock and challenges. I know we could spend a whole other hour talking about all this, but in a few minutes, tell us a little bit about some of the things, and you shared some, but...

June Wilson:

Yeah. I would say in the middle of our working together, once we stopped to do caucusing work, that was a huge challenge and almost a reconcilable roadblock. And it was challenging because when you have particularly trustees who are used to always being engaged and hearing what everyone is saying, that idea that there would be a caucus for the people of color to have conversation without the white folks in the room was dramatically challenging for organization and our leaders. And that took a long time to really unravel and grapple with. And Heidi, who was our consultant was extraordinary. And we ultimately had to also then bring in a somatic practitioner to help us just also began to engage what's going on in the body, what's going on with the reaction, but that was sort of midway through the process and it was difficult. We ultimately kept doing it. We did it slightly different, but we kept doing it

because we were trying to shift kind of that normative behavior of I get to hear everything. So I would say that's it in a nutshell.

And I see Eliza, can I address Eliza's question in the Q & A, how do you recommend that staff members who aren't senior leaders in their orgs make the case for deeper engagement on DEI issues with leadership? And I would say sometimes senior leaders also have challenges, but trying to find inside your organization, folks who can commit to it with you so that you're not alone, that you're really beginning to engage in conversations with others in order to push it forward to the senior leadership. And at the time when we started the process, I was executive director and I still had to work with some of my other staff team to just continue to say, how are we going to talk about this? How are we going to move this forward so that we can carry it forward at the board level? So continuing to find those in your organization, who could you and broaching the conversation is one way of doing it.

Sindhu Knotz:

Thanks June. Erin, do you want to reflect on that question too? I'm going to start to weave in some of these questions.

Erin Kahn:

Yeah. And I just put in the chat that one of the assessment tools that we used. I think one thing that was useful to us was bringing in like outside, like we have a board meeting and having like a learning session at a board meeting where we had an outside speaker. Another foundation might come and talk about some of the work that they've been doing. And that might be a specific area like how they were shifting their grantmaking practices or how they were launching in a new programmatic area that had more of a racial equity focus to it.

So I think learning from peers and suggesting that type of learning opportunity could be one approach. I think having using some kind of assessment tool could be another approach and I think bringing in, I guess I would partly just encourage folks to raise it with whoever their manager is and say like, Hey, this is a really important value to me and I'm wondering how our organization could be doing more to explore this area of work.

And one maybe bit of advice, I had alluded to that, I think once you start to roll up your sleeve, I observe the tendency to be is like, oh, we can do all these things. And you come up with like 150 ideas that take time and money and investment of at all kinds of levels, and then the people can be disappointed because you're not making progress on all 150 of those ideas. So I think maybe there's just a couple things that you can try and frame it as trying, saying not like, oh, we have to shift all these practices and we have to profoundly make all these permanent changes, but say, Hey, can we try this thing for six months and see how it goes and make a commitment to each other that we're going to check back in.

So we, for example, did these, like June mentioned this sort of race-specific caucusing groups, like learning circles that were divided. That was a more mature step I think after we had done much more work as an organization, but we partly said, let's do these for six months and have an agreement that we're going to come back in and see how it's going and reflect on whether we want to do things differently in the future. So I think moving away from this idea that things feel scary when you have to commit to them for life, but if you can frame it as let's try this, let's see what we like or don't like about it, and hold open the possibility that we might do it differently down the road can sometimes be a more

palatable way of introducing new practices or policies to an organization that feel a little less disruptive maybe to the leaders.

Sindhu Knotz:

Thanks, Erin. I'm going to go to one of these questions here. You both talked a little bit about resistance, and I think this question speaks a little bit to this. What are your suggestions for dismantling the white normative norm that prevails on hiring practices, policies and grantmaking? Many leaders provide justification for keeping these systems intact. For example, we interviewed BIPOC, but other organizations hired them before we did et cetera. Erin, if you want to take that one?

Erin Kahn:

Can you repeat the first part of the question?

Sindhu Knotz:

What are your suggestions for dismantling white normative culture that prevails in hiring practices, policies and grantmaking?

June Wilson:

I would say the first part of it is being able to name it. What is the white normative culture, what's actually happening, because for folks who haven't done a lot of deep work, it's difficult to see. So consistently trying to name it, consistently trying to also work with folks who really can understand the way in which, particularly in hiring, who are your consultants that you're working with, if you're working with consultants to do hiring, how do you look at the process by which you think about hiring? So for example, there was a way that's still folks, well, we didn't get the qualified folks to apply. And so if you commit to not even reviewing applicants until you have a diverse pool, then you can't use that excuse. Oh, well, no one, we didn't get the qualified, the work has to be on the front end and continuing to recognize and build awareness around what you can even see. So that's one example. Erin?

Erin Kahn:

I 100% agree with that. There is a document, I think it's called like, it's white dominant culture.

Sindhu Knotz:

White Supremacy Culture, Tema Okun's article?

Erin Kahn:

Yes. And think It's been updated. And so that, like June was saying, being able to name what these practices might look like and just becoming more mindful of places where in hiring are you requiring qualifications that if you really step back and think about it, like, do we really need a master's degree to do X job? And I think just being curious about what are the things that we're doing that maybe we have these sort of assumptions that we should kind of examine. I think one of the things that I started to really pay attention to in hiring was just the capacity for self-reflection. And people who could, I love to

ask in an interview, tell me about a time that you really blew it at work and what did you learn from that? And it's really telling when in an interview, somebody starts with something they messed up on, but somehow later in the explanation is someone else's fault.

There are people who can really kind of accept responsibility and demonstrate a desire to learn and grow. I found of myself wanting to hire people that brought that perspective as, because it often to me is linked to how they might lean into racial equity work, particularly if they're white. And to June's point, being willing to say this pool is not good enough to even start interview candidates is something that we did and served us well, because it either meant that we weren't quite framing the job properly, or we weren't doing enough legwork on the front end to really make sure that we had a good diverse pool to even consider before we moved into that more intensive kind of interview stage. So being willing to go back to the drawing board is I think very helpful.

Sindhu Knotz:

There's another question here around specific positive outcomes beyond staff morale. So if someone is saying, I'm thinking about trying to build a compelling case for the work, what has shifted, what positive outcomes did you see that could be helpful for other family foundations who are starting the journey?

June Wilson:

Could you restate the question?

Sindhu Knotz:

Some specific examples of positive outcomes to build a compelling case for the work?

June Wilson:

This is a specific example. Quixote had been practicing in our grant-making really having conversations and listening and hearing from the community. And we were engaging in a process around reproductive rights that was a five year grant-making area and it was a deep process, regional, with folks leading in the work from the legal in and advocacy in. And we were hearing from communities and there was a design process that asked that collectively folks came to the values and what they wanted to do, and what the community wanted was something very different from what Quixote wanted. And what the community wanted was to really look at the shackling of women in prison, and that they considered that as a reproductive rights issue. And what Quixote wanted was something very different in that design. And it was really in that process for me that began to sort of made it clear that because of the power and privilege and the point of view that Quixote had and perspective that unless we did this work and did it in a deep way, we could never again ask the community for their input. Otherwise it was real problematic, because it would mean that we were asking the community, not agreeing and then not funding. And that was a real disconnect. And that is what really shifted both for me, and then the collective conversation for why this work was critical and it transformed us.

Sindhu Knotz:

That's great, June. Erin do you want to share any thoughts on that question?

Erin Kahn:

A couple come to mind. One I mentioned the diverse applicant pool when we start getting more centered on racial equity. It drew different people to our organization, which I think was a really good outcome. I think job satisfaction and kind of, I think generally people were, the staff morale did get better, also I think for a period of time got worse because I think as people learn and grow, their bar changes. And so then your deficiencies are kind of more laid bare. So I think you kind of go from a high to like a low, and then hopefully come out again.

I think from a grantmaking side, we started to invest more in capacity building around DEI for our grantees, and they really were grateful for that support. And we got a lot of really strong feedback about the transformative experiences those grantees were having as a result of that investment. And then I think we just got better about our strategies. I think we got smarter about, for example, we were funding in public education and previously had like no kind no racial, almost no racial lens on what we were trying to change in public education. And when we started to pivot our strategy, I think we got much sharper about how race impacts and is implicated in the design of a public education system. So our diagnosis of the problem shifted, how we were going about our strategy shifted, and I think it led to much more impactful results in the areas that we were trying to move the needle on. And so I really saw like a really, those shifts were happening already, but I think we got some headwind in that our tailwind. I can't remember, I guess you want the wind behind you in that work as the organization's overall focus on DEI became more central.

We funded in youth homeless, and that's our understanding of how that system is deeply racialized outcomes for which kids face homelessness and how providers were serving them. We really started to dig into that more. So I think there were a lot of different places where in our grantmaking we were making smart decisions about who to fund and what to fund as a result of the work we were doing organizationally and the learning on the team that was happening.

Sindhu Knotz:

Thanks so much, Erin. I knew this would happen. We're running out of time. I wanted to just ask each of you to say a quick word of advice by way of closing to our wonderful participants on the webinar today before we close out. Or closing thought if you feel like sharing enough advice.

June Wilson:

I think both, I was thinking is my closing thought the same as advice? Think about the work being long term, that even when it's hard and it will be hard, it is transformative. It is totally transformative.

Sindhu Knotz:

Beautiful. Thank you, June. Erin?

Erin Kahn:

I agree with those comments. Find some allies and support peer. We started convening other foundations in our region to kind of have peer groups around like, how do we do better? And particularly, how do we navigate? Not so much wasn't my challenge, but for many other people, frankly,

how do they navigate the board and the gap between where the staff wanted to go and where the board was ready to go. So find your learning and connection opportunities to give you ideas. And then I think you don't have to boil the ocean, start with concrete steps, be willing to try something, it's better than nothing, and be willing to acknowledge mistakes and what worked and what didn't work and do something differently in the future.

And then I think particularly for white people on this call, we got to be braver than we've been. And I think one of the, and just like June said, you're going to make a lot of mistakes. I made so many mistakes and things I can't undo, but what I can do is try to get better. And now, I'm much more aware of when I'm making mistakes, when I'm making them. I'm like, ah, I just totally blew that. So it's not like the mistake making is done. You don't ever, I don't think you arrive, the work isn't complete, but I think you have to then say, okay, well, I need to just do better next time. So just having a kind of learning mindset I think is a really powerful tool.

Sindhu Knotz:

Thank you so much, Erin and June. I learned so much from both of you all the time. I'm going to hand it back over to Jason.

Jason Born:

Thanks so much Sindhu and Erin and June as well for all of your wisdom you shared today for your personal commitment to DEI work, and for, of course, the ongoing guidance that you're providing to families and donors in this area. We can't thank you enough.