Grantmaking with a Racial Justice Lens

A PRACTICAL GUIDE

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equity

inclusion

racial justice

movement

leadership

transformation

change

community

Philanthropic
Initiative for
Racial
Equity

structures

advocacy

power

social justice

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Introduction

Since 2003, the **Philanthropic Initiative for Racial Equity (PRE)** has conducted research, convened, and consulted with foundations to raise awareness of structural racism and to establish racial equity as a core aspect of excellent philanthropy.

In 2006, we brought this knowledge to partner with GrantCraft in co-producing **_Grantmaking with a Racial Equity Lens_**,[1] which examined how to advance racial equity in philanthropy. At the time, PRE's emphasis on addressing structural racism and centering racial equity as grantmakers' core goal and practice was in contrast to prevailing popular strategies, such as "colorblindness," "universal" approaches, or focusing on staffing diversity.

PRE and our partners defined a racially equitable world as one in which the distribution of resources, opportunities, and burdens is not determined or predictable by race. We argued that an explicit racial equity lens ensures that the particular needs and assets of communities are taken into account, and that diversity, while important, is insufficient for addressing the deep-seated power imbalances endemic to philanthropy. Grantmakers' attention to racial equity has supported racial justice activists and helped to nurture a growing field of philanthropic

work that includes philanthropic affinity groups, strategic consultants, and intermediaries. This evolving, multidisciplinary practice is what we have come to call grantmaking with a racial equity lens.

Grantmaking with a Racial Justice Lens: A Practical Guide centers the perspectives of racial justice activists first, and then of funders working on change in their institutions, to identify best practices for driving philanthropy beyond racial equity toward racial justice.

This guide will be most useful to an audience of grantmakers who have already made or are close to making racial equity commitments, and who want to drive their work into more ambitious territory that includes power building and structural transformation. Through reflections and frameworks built from the direct experience of activists and funders, we offer practical steps and solutions for advancing racial justice grantmaking in any philanthropic setting.

Communities of Color on the Front Lines of Transformational Change

It is clear that the most impactful work in the country is often done by Black and other people-of-color-led organizations that are deeply committed to long-term systems transformation. The phenomenal work of Black women-led organizations to deliver historic electoral wins, the transformative work of Indigenous leadership to defend Standing Rock, and breakthrough work on immigration rights are just a few examples of organizing in communities of color that is redefining change work and breathing new life into U.S. democracy.

Philanthropy has been making a shift toward recognizing these assets and away from the old dominant paradigm of limited, deficit-oriented funding. The last ten years have seen the rise of a new generation of racial justice leaders from every community, building power among everyday people and making structural change. Activism on racial issues, if not at a provable all-time high, is certainly drawing new recruits at historic levels. Organizations and leaders campaign on a larger scale and with a wider array of

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1   _Grantmaking with a Racial Equity Lens_ was co-developed in 2006 and published January 2007 by the Philanthropic Initiative for Racial Equity (PRE) and GrantCraft. At that time, GrantCraft was a project of the Ford Foundation, and in 2011 moved to Foundation Center. In 2019, Foundation Center merged with GuideStar to form Candid.

sophisticated tools than at any other time in the last fifty years, bringing enough daily media attention to key issues to drive informal conversation around the proverbial water cooler. The vast scope of those key issues underscores the role of racial discrimination in every aspect of life, from birth to death.

The work of racial justice groups has fueled impactful change across the country—and the benefits of these changes reach far beyond communities of color. In Florida, for example, Black-led organizations anchored the campaign to pass Amendment 4, which restored voting rights to people with felony convictions. Only 28 percent of those people are Black; a small portion is Latinx and everyone else is white. Communities of color have also led the way on environmental issues that benefit everyone. In California, multiple counties have banned fracking as a result of organizing by Native American and other communities of color. Finally, the corporate accountability campaigns led by groups of color are forcing change at large companies like Google, which banned ads by bail bond companies, and have driven corporate sponsors away from the American Legislative Exchange Council (ALEC), the right-wing legislative powerhouse. Proximity to affected communities, development of local leaders, and knowledge of the best potential solutions are all assets that racial justice groups led by people of color bring to their work.

In addition to protest and civic action, the racial justice field has also built its communications capacity and pursued culture-shift strategies. These strategies have engaged celebrities and interventions in fields from sports to fashion, bringing racial justice out of technocratic fields and into more accessible arenas. Today, community groups and networks of color sit in television writers' rooms, and key racial justice organizations are name-dropped in dramas and comedies; the Associated Press has removed "illegal immigrant" from its style guide.

Finally, strategists are connecting social movement activity with other forms of social change. There is more coordination and overlap between the social movement and civic engagement sides of the racial justice house, and activists are entering into new forms of organization, including 501c4 efforts. Organizers are also incorporating direct service provision, new community spaces, and the creation of alternative institutions into their strategies.

Funders are grasping the important role of advocacy and organizing and how they interact with other strategic threads. The mass protests of the last decade have forced the nation to confront the systemic nature of phenomena like police violence and environmental degradation. Dynamic campaigns and strategies have revealed the benefits of direct action, especially in combination with civic, cultural, legal, and service strategies in shifting institutional policy and practice. These developments have been accompanied by a burst of creativity in social change methods, with emphasis on engaging real people in meaningful civic action, whether it be voter registration, protest, or new forms of community service.
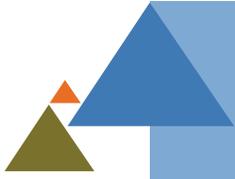
ABOUT THIS GUIDE

Throughout the guide, you will find **useful tools for implementing a racial justice lens** to boost your foundation's success at supporting structural transformation and building power in our communities.

Methodology and Style

Grantmaking with a Racial Justice Lens has been developed through a three-part process that emphasized qualitative data. We began with focus groups and direct interviews with staff at racial justice organizations throughout the U.S. to uncover critical questions about philanthropy in this area. Those questions included:

- **What do racial justice activists want funders to know and change to increase effective and sustainable support for their work?**
- **How do funders understand and define racial equity, racial justice, and power building?**
- **What are change agents within philanthropy running into as barriers to advancing racial justice grantmaking, and how are others overcoming those barriers?**
- **How do funders hold themselves accountable to transformative racial justice goals?**

To answer these questions, we interviewed diverse representatives from foundations of varying size, type, and geography, and at various stages along a continuum of racial justice work. Our philanthropic interview and focus group participants represent a broad range of public, private, community, and intermediary grantmaking institutions in regions across the U.S., as well as more than a dozen global funders who provided critical insight into overarching themes that will be highlighted in future publications.

A diverse team of researchers conducted more than fifty interviews, led six focus groups, and held stakeholder meetings with activists and with staff from foundations and intermediary and support organizations in person and by phone, email, and video conference from August 2017 to October 2019.

Another data set came from PRE program activities conducted in 2018 and 2019. The resulting insights and arguments were tested in PRE Racial Justice Funder Labs and cohorts that, in turn, engaged dozens more foundations. These gatherings featured activist-led and peer-learning activities, and included funders who had already been using a racial equity lens and have been moving toward a racial justice lens.

The research and writing team read the transcripts from every focus group and interview, pulling out themes and key lessons. Simultaneously, PRE staff tracked discussions and examples that arose during labs and cohort meetings.

Anonymity allowed for greater candor as well as a focus on the transferability of any particular experience or insight. We do not attribute these insights and stories, identifying interviewees only by descriptors such as their position, racial/ethnic identity, gender identity, sexual orientation, issue focus, type of foundation, and region. We choose descriptors relevant to the context of the quote to convey the range of voices, but in ways that preserve anonymity. Accordingly, we sometimes use a broader ethnic/racial or foundation-type category rather than something more specific that could identify the speaker. We use Latino/a when quoting a person who identifies as such, and Latinx for the broader community. Quotes and personal accounts have been edited for clarity, not content.

Developments in Racial Justice and Philanthropy

With decades of progress under threat, these times demand the best of our collective abilities. The national context has been defined by the pendulum shift represented by the elections of Barack Obama and Donald Trump, as well as by many lessons learned from the struggles and victories of communities of color. No matter the outcome of future elections, the assault on civil rights protections at the federal and state levels has created, for these communities, an undeniable crisis to be met in the decades ahead.

Without question, racial justice organizing and activism has visibly intensified in the U.S., catalyzed in part by the slaying of Trayvon Martin in Florida in 2012. When Michael Brown was shot to death in Ferguson, Missouri, in 2014, protests swept the country, and grew exponentially with #BlackLivesMatter and #SayHerName as new victims were added to the list of killings by police and vigilantes. Likewise, the immigrant rights movement, despite grave setbacks, has drawn new groups, expanded defenses against deportation and family separation, and continued to demand comprehensive reform.

There has been a significant focus on intersectionality and anti-Blackness in an evolving lexicon and practice of racial justice. While neither concept is new, both are now central elements of the discourse. Intersectionality, the phrase coined by scholar Kimberlé W. Crenshaw—building on lessons of the Combahee River Collective and others originally to advocate for a complex understanding of Black LGBTQ women—generated new connections between race and such systems as sexuality, gender, class, and disability. The #MeToo movement exhibits an intersectional take on sexual violence that highlights race and class while still building solidarity among women across identity lines.

It is becoming clearer to funders that structural racism affects every issue, and there is more willingness to consider the racial dimensions of issues that in the past were deemed race-neutral. Funders in LGBTQ and immigrant rights, the environment, fiscal policy, health, and civic engagement have stepped up their racial equity engagement. Funders for LGBTQ Issues, for example, has executed a multiyear plan to move money to issues and organizations that affect LGBTQ people of color, including report cards on foundation performance and tools to reshape portfolios.

Scholars and activists have also identified anti-Blackness as an organizing principle of racial hierarchy, given the central role of slavery and repression of Black self-determination in U.S. politics and culture, and many funders have stepped up to support Black-led groups focused on social change. To a lesser extent, attention to anti-Indigeneity has illuminated the treatment of Native American history and communities.

Digital organizing has helped grow constituencies among communities of color. Native American organizations and issues gained attention through struggles over voting rights, adoption, stereotypical sports mascots, and environmental degradation. The resistance to the Dakota Access Pipeline near the Standing Rock Sioux reservation drew weeks of national press coverage. The 2016 election and its immediate repercussions generated some of the most frequent and largest demonstrations in the nation's history, including the continuation of Movement for Black Lives protests, the 2017 Women's March, and rallies nationwide against neo-Nazis and white nationalism. A 2018 poll by The Washington Post and the Kaiser Family Foundation found that one-fifth of Americans surveyed had joined a rally or protest in the past year; a fifth of that group reported they had never before attended such an event.[2]

Also without question, philanthropy has strengthened its racial equity muscle in the last decade. Funders have demonstrated genuine interest in—if not perfect execution of—adding racial equity and justice work to their portfolios. High-profile grantmaking campaigns have elevated Black and Native American communities in particular, following assertions by organizers of all colors that these communities had gained too little from earlier patterns of support and needed a serious infusion of resources.

An unprecedented number of foundations and philanthropic infrastructure organizations have added racial equity explicitly to their communications and programming. While not without its critics among some progressives, the language of "diversity, equity, and inclusion" has been codified as DEI. Dozens of foundations, both public and private and across every region of the country, have embraced bold, comprehensive strategies to move racial equity and even racial justice goals. Funding collaboratives have formed to support work led by and serving specific immigrant, Black, Native American, Latinx, Asian American and Pacific Islander, and AMEMSA (Arab, Middle Eastern, Muslim, and South Asian) communities.

Make the Case for a Racial Justice Lens

The daily practice of using a racial equity lens in social change as well as in grantmaking has established a baseline understanding of structural racism, and it has also produced new insights, definitions, mistakes, and nuances.

Since the publication of **Grantmaking with a Racial Equity Lens**, we have seen racial justice concepts take root throughout society. It is increasingly commonplace to see use of the phrases "systemic racism" or "white privilege" on cable news, in mainstream coverage of protest movements, and even on primetime television referencing implicit bias and disproportionate racial impacts. Political events like the elections of Obama and Trump have changed the country's political, economic, and cultural landscapes. Simultaneously, public engagement addressing racism, including organizing and direct action, has risen to historic levels, driven by the contributions of organizers, communicators, journalists, scholars, and artists.

Language evolves; words take different meanings depending on the context. Activists and a growing number of grantmakers have been calling for an evolution from a racial equity lens to a more ambitious racial justice lens.

The Difference Between Racial Equity and Racial Justice

While many people use "racial equity" and "racial justice" interchangeably, important distinctions have emerged in their application. Activists in our focus groups and interviews said that "justice" is a more accurate word for their actual visions. "We are putting forward solutions that we think would actually get to durable harmony within the country," said one Black longtime racial justice activist and leader. "Our programs are designed to be the embodiment of a new vision of community, safety, grounded in restorative justice and economic opportunity."

The term "racial justice" raises the stakes, elevating the positive vision and power of communities of color and centering fundamental systemic transformations. In describing a new "racial justice" lens, PRE invites grantmakers to train their focus on the deepest, most complex aspects of addressing the ways racism permeates political, cultural, and economic norms and what is truly required to uproot it. Depth and complexity include recognizing the ways in which race interacts with other identity hierarchies (gender, sexuality, ability, nationality, geography, class, and more) to shape a community's conditions.

Our interviewees named vision, history, transformation, and self-determination as key features of racial justice that racial equity doesn't always include. Justice is a stronger, more open-ended word that invites examination of the core assumptions of our society and how our institutions uphold those assumptions. For example, one can design a service-delivery or community-education system to reduce racial disparities, which could constitute "racial equity," without ever engaging the recipients of that service whose lives and leadership are crucial to effective solutions, which would be critical to "racial justice."

Racial Equity

Racial Justice

The original guide describes four important features of **a racial equity lens**:

Analyzes data and information about race and ethnicity
Understands disparities and the reasons they exist
Looks at structural root causes of problems
Names race explicitly when talking about problems and solutions

A **racial justice lens** adds four more critical elements:

Understands and acknowledges racial history
Creates a shared affirmative vision of a fair and inclusive society
Focuses explicitly on building civic, cultural, and political power by those most impacted
Emphasizes transformative solutions that impact multiple systems

A racial equity lens separates symptoms from causes, but a racial justice lens brings into view the confrontation of power, the redistribution of resources, and the systemic transformation necessary for real change.

Justice requires urgent fundamental changes that reposition communities of color in relation to power and resources, which includes being able to challenge and shape the many institutions that determine a community's conditions. A Black program officer at a private foundation said, "You can't say 'justice' and not imply that something must be done and must be done now."

One Native organizer described the difference between equity and justice:

"It's not enough for Indian people, other people of color, and white people to all be equal if we don't address the systemic roots of the inequities, which is an economic system which has never provided for the vast majority. So many philanthropies are rooted on corporate profits and their desire to do good with some of their money. Unless they're investing in Indian Country, understanding that we need a fundamental transformation of governance and access to resources, then they're investing blindly and only investing in Band-Aids."

Creating a shared affirmative vision of society is a central component of racial justice. Principles for that vision include imagining new systems and moving past defensive postures to proactive visions. "Justice entails a transformation of circumstances," a Black program officer said, "whereas equity is about operating from the same circumstances and conditions." The Black executive director of a private foundation put it this way: "Racial equity is the absence of violence; racial justice is the presence of peace, wholeness, and abundance."

While "racial justice" evokes a higher standard, the wording and aims of equity may offer a starting point and still be useful. In the context of "diversity, equity, and inclusion," it's important to ensure that the equity isn't diminished.

One white funder involved in an issue-based funder network said, "The group landed on equity because it was open enough that there was room to define it. That might be an invitation for foundations who probably, within their own institutions, could not explicitly say racial justice, for example. A racial justice frame is a bit more overt and clear, and maybe more perceived as political by some institutions."

Whatever the lexicon, the most important thing is that funders, grantees, and communities have a shared

understanding of their intent, goals, and evaluation measures.

For example, a healthcare foundation that had been using racial equity in its mission statement for more than a decade recently decided to add racial justice. The foundation kept the equity language because its audiences are familiar with it, but felt that expanding to include "justice" enabled it not only to build strategy, but also to address root causes, historic harm, and potential reparative solutions based on current conditions, which tend to focus on lack of access to institutions and resources. The expansion also signaled the foundation's commitment to organizing. "Justice includes an element of power building that the conversation about equity hasn't been very explicit about," the foundation's Black president said. "The reparative and the power building are the two pieces of the justice framework that are different from equity and need to be a part of the work."

Many activists noted that they are able to be much more explicit about racial justice with funders, and shared a range of evolving practices that point to often surprising shifts in approaches or among individuals within foundations. One Latinx activist shared that it has become easier over the past few years to talk explicitly about race with philanthropy: "After lots of tough conversations, funders are definitely starting to recognize not just the importance of Latinx issues and representation, but also that we as Latinx communities experience racism and struggle with racial hierarchy even in the context of migration and global economics."

Examples of philanthropic leadership geared toward achieving racial justice abound across the country, just as they do in neighborhoods, schools, workplaces, and city halls. Effective leaders design and direct processes that align staff and boards, enabling grantmaking that makes racial justice more possible. The next section explores obstacles and solutions to building agreement on a racial justice lens.

Align Foundation Practices with a Racial Justice Vision

Racial justice requires long-term transformations that are only possible with an ecosystem of organizations, leaders, and resources robust enough to keep opening new opportunities for asserting community power and generating new decisions and systems. Pursuing a positive vision is, in fact, much more difficult than solving a narrowly defined problem, requiring even more of the best practices philanthropy has to offer.

Stable, long-term investments have the most significant impact on the structures and relations of power. Long trajectories require deeper alignment among the members of an ecosystem, including its funders. Backsliding on previous racial justice victories is commonplace and it can be difficult to maintain a proactive stance when the movement is forced into a defensive posture by its opponents.

Simply put, social movements require sustained funding and support so that they can pivot as needed amid many tactics and arenas of struggle (e.g., from exercising civic power on housing law to exercising consumer power on hate crimes). Momentum on issues like workplace discrimination and criminal justice reform has taken a decade or more to build—far longer than the three- to five-year time frames of most foundation initiatives.

Recognizing that a portfolio full of long-term commitments can block responsiveness or shut out emerging groups, some foundations have chosen to increase their payout to create at least a small fund for new investments.

Develop Explicit, Shared, and Tested Language

The first element of alignment is establishing a shared language and concepts about the problem to be addressed, and a collective view of the root causes and proposed solutions. Real consideration and thought need to go into ensuring that a foundation's racial justice values are accompanied by a structural strategy for change.

Some program staff and other foundation leaders continue to hold reservations about how vocal they can be—that is, when to employ codes and when to be fully explicit. An "under the radar" approach that relies on discretionary, special projects or even the interests of a specific program officer can indeed get dollars out the door. But this level of pragmatism also has obvious drawbacks: Commitments may be erased with the exit of a key champion, or boards may pull back from similar grants under external pressure for which they are unprepared. A South Asian foundation president said, "When you don't have an institution giving you a clear commitment that has really been built out at the board level, then programmatically it is inconsistent."

Program officers facing these choices can ask themselves: What is driving my perception of the risk, and who is bearing that risk? Is the immediate gain truly in the grantee's interest, and is there a longer-term cost to not being explicit? Could those costs include setting back standards for racial justice funding across the field into the sort that can only be done under the

radar? It takes courage and smart strategy to advocate for an explicit racial justice lens, but stories of leaders who have done just that abound. Philanthropists taking a more visible step have no shortage of inspiring peer examples.

Even among the more advanced level of funders we engaged, their institution's comfort level clearly shaped their language. Once the language changes, they continue to clarify its meaning and implications. Noted one Black program officer,

> "We talk about diversity and inclusion, but we actually need to say the words "race" and "racism." Even though this is a progressive or racial justice-minded foundation, there still is a lot of work to do to really make that core case that when you're supporting communities of color, you are supporting the entire boat of people to be lifted. It requires people even at more progressive places to be vigilant and unapologetic about what racism is—past and present—and how it affects disparity."

One community foundation executive said, "Our board doesn't have any fear around the notion that power dynamics are what's driving this inequality. They do have some concerns as to how we talk about power, how we phrase it to avoid clichés that tend to become lightning rods. Instead of the transfer of power, we talk about organizing and movement building that creates a greater level of civic engagement, that then creates a greater level of accountability, that then also instills change in the institutions."

Testing for shared meaning is much harder, but worth doing because those definitions determine the actual grants one will make.

It is better to agree on less ambitious language and make real, concrete grant gains than to agree on lofty language with vague program implications. When staff attempt to make grants under those vague guidelines, they can often encounter resistance: The very different lenses that are often in place based on identity, prior experience, and consciousness about race and racism can leave some decision-makers having one interpretation of the language, while change agents may take very different meaning.

One philanthropic advisor/consultant told a story about a foundation with an all-white board of more than twenty people holding views across the political
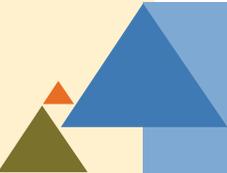
TEST FOR SHARED MEANING

Foundation leaders can assess the level of shared understanding of the vocabulary and agreement with key concepts **by using the following practices:**

1. **Ask for a repeat back**—find out what people think a word or phrase means.

2. **Debrief old grants against new concepts** to see where they line up or diverge.

3. **Discuss real-world events,** both one-on-one and together, to build shared analysis.

4. **Observe the positive or negative responses** to exposure to movement voices.

5. **Note reactions to potential grants** that seem to indicate understanding or misunderstanding of concepts.

spectrum that adopted extremely progressive, structural racial justice language for a new RFP. When the consultant saw the RFP, she responded, "Your board has no idea what they just passed. And while you may have been able to get this through, you'll never get the grants through." The foundation leaders then assessed the gaps between staff and board thinking, ultimately pulling back on the language to something less ambitious and visionary, yet nonetheless making meaningful grants and pushing for deeper understanding and alignment that will enable more ambition.

In another example, the president of a women's foundation challenged the board to confront racial facts. "We've always named gender, but for us to start naming race explicitly, we needed to have the data to help us deal with the pushback from leadership," she said. "What it came down to is once we made our case with data, then those board members who were afraid of adopting the racial justice language were now in a position where their refusal to take the realities into account would put the foundation's credibility on the line."

When any of these steps surface differences in understanding, we have great opportunities to clarify our collective thinking.

Set Your Goals, and Follow Through

Foundations taking an explicit, transparent approach to setting goals and guidelines for racial justice work have the best conditions to succeed. But they must be prepared to defend the centrality of organizing among their peers and others. Power building among disenfranchised people may threaten current power holders—including the philanthropic class.

Moreover, a simple diversity lens, without equity or justice attached, can lead to random grants to organizations of color that may not have a racial justice mission, or to historically and/or predominantly white organizations seeking new demographics without embracing racial justice values and goals. For example, a Native American funder notes that they can receive proposals from Native groups whose version of self-determination differs from the foundation's: "We get proposals also that come from Native people, but they're not rooted to a culture, to a people, to a history, to a place. And they're about acculturating themselves or others."

Set the Tone Through Your Foundation Leaders

Presidents, trustees, and other foundation leaders, regardless of identity, set the tone. To champion racial justice out loud may be the first step to aligning the entire foundation. That, in itself, takes commitment and humility. For example, a Black program director reflected on preparing the funder's white president to lead on racial justice:

"I provided lots of data about the demographic shift. I made the case that we care about kids and families, and we always say that we want to do our part to ensure that kids are going to be successful, so this is the reality we have to deal with. That alone was enough for the president to say, 'I never thought of it like that. This is our mission. These are our kids. And we've got to think about all kids.'

He acknowledged that we talked about these kids indirectly and implicitly, referring to them as disadvantaged or in distressed communities. We weren't very articulate and explicit about who we were talking about. The president needed the words to use, and he needed to know that the field supported him stepping out as he did."

To move a racial justice agenda, leadership must be both consistent and explicit. As one community foundation president noted, "This work takes a very committed level of leadership, at the board level especially. It has to be definitive and wanting to stick with this, has to want to wrestle with the more difficult, murky, complex issues related to race. Because you can't do it if you're vacillating back and forth between talking about it and not."

One white grantmaker at a large mainstream foundation noted the difference in her experiences when there was clarity from the top: "There was a different frankness and candidness about talking about these underlying issues when the CEO said it was okay, and when there was a new CEO that changed. That was

the only time I've been exposed to explicitness on a continual basis. Even then, it only came up when it was forced or when it was an obvious factor that needed to be acknowledged."

Likewise, a Latina program officer noted that only deep advocacy by the CEO moved racial justice from the category of "things we should discuss sometime": "Our CEO has been a big proponent of having this conversation," she said. "What has really given us permission to really go forward is to get goals from the top. Because there is a goal, we can now have support. Through the years there have been some board members talking about it, but we never took a dive until now. So now it's the CEO, now it's the board, and it's a directive."

Engage All Parts of a Foundation

As a foundation aligns its philosophy and operations to pursue racial justice goals, it is important to communicate all the way through that process and to

make sure that the vocabulary is both clear and shared.

In addition to programs, all parts of a foundation—communications, operations, grants management, finance, development, and others—should engage at the start of the alignment process, rather than at the end, and repeatedly address the following questions:

1. Why are we focusing on racial justice?

2. What impact do we want?

3. What process are we using to learn, develop options, and make decisions?

4. Who will be making what decisions?

5. What is the timeline for change? Which phase are we in now?

Remember That Identity is Not Analysis

More people of color have found a place in philanthropy in recent years, but their still-modest presence doesn't necessarily correlate with the use by their foundations of a racial justice lens. For example, from 2006 to 2015, foundations with over $1 billion in assets reported an increase of staff of color at all levels by 4.1 percent.[3] While foundation funding for communities of color increased during this time, the percentage of giving to communities of color went down slightly.[4]

Nonetheless, both activists and grantmakers acknowledged that the entry of people of color—especially former organizers and other activists—into philanthropy has opened some opportunities for racial justice work. One Black former community organizer who is now on the grantmaking side noted, "After [a] site visit concluded, the [nonprofit] executive director came to me. She said, 'It's really good to be able to talk to someone in philanthropy that gets the work, understands the work, so I don't have to build all of that out to someone that doesn't really get it or understand it.' That's when I realized how beneficial my background

was to being in this position."

But diversifying the sector isn't enough to fuel racial justice goals. Interviewees and focus group members noted that even philanthropic staff who come from communities of color don't always themselves embrace explicit racial justice goals, or the concepts of power building and systemic transformation. If they do, they also face significant barriers to incorporating racial justice. A Native American program officer called out these shortcomings: "I don't know that philanthropy truly has been challenged to the point of action. I'm not confident that philanthropy, as a sector, really wants to change. I've watched it over the last twenty-five years change in terms of the faces in the room and some of the vernacular, but not its systems and core."

It is certainly possible for foundations employing people of color to make grants without a racial justice lens. Some foundations hire people of color into key positions and then expect them to cover all the racial justice ground. While coming from impacted communities can certainly shape a foundation staffer's

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3   *The State of Change: An Analysis of Women and People of Color in the Philanthropic Sector*, Floyd Mills, Council on Foundations.
4   *What Does Philanthropy Need to Know to Prioritize Racial Justice?* Philanthropic Initiative for Racial Equity, Race Forward, and Foundation Center.

point of view, we cannot expect one person to either represent a whole community or to answer all the race questions. As one Latino program officer observed, "My experience has been, 'We're glad that you can bring a certain group of networks. We're glad that you have knowledge in a particular community.' But there is a point in which you convert [i.e., are pigeonholed] to the Latino advocate. That could be problematic when I want to talk about other parts of the work."

Sharing a particular identity doesn't mean that we all approach racial issues systemically rather than individually, or that we hold systems accountable rather than the people who are impacted by the problem we are trying to solve. One grantmaker said, "One of the key lessons for me early on was that just because I was a Black grantmaker didn't mean I knew how to do

racial justice grantmaking. There's an important course of study that I needed to engage in even to inform my own aspirations."

A Black program officer noted, "Just because you are a person of color does not automatically mean that you believe that race needs to be centered. It doesn't automatically mean that you know how to organize and that you understand organizing. It doesn't automatically mean that you are a progressive. I've had conversations with people that I thought had the same understanding about the work, and we don't. We just have very different experiences and expectations."

Address Resistance

Resistance is bound to arise as a foundation undergoes these explicit, clarifying processes that will determine its grantmaking approach. It is a normal part of antiracist organizational development.

Resistance can take active, passive, and, at times, diversionary forms. The active might include expressing reservations about a racial justice direction or constant deflection of race discussions in favor of class, democracy, or another exclusive, non-racialized frame. The passive might look like raising concerns about staff getting ahead of board or management, and yet withholding full participation in educational sessions. Diversionary resistance is increasingly common as racial justice concerns become harder to avoid. To divert, funders generate lots of activity without actual action—

for example, by requiring duplicative field scans or continually adding new layers of processing before decisions can be made and action taken.

It's easy to ascribe motivations behind opposition to a racial justice lens, but inquiry should always be the first step. Not all resistance is the same. Ask questions, engage, and try to identify the source of objections through one-on-one and group conversations. Common sources of resistance include fear of displacement, disagreement that racial justice is central to social change, reluctance to name racism explicitly even if that agreement exists, or anxiety about capacity and overwork. (See following graphic for ways to respond to these objections.)

Don't Run Away From Conflict

It's better to create supported openings for conflicts to come forth than to try to hide or quiet them. Conflicts frequently arise over whether or not to be explicit about a racial justice lens and commitment. Leaders of public foundations may fear losing donors; all foundations may fear reputational damage or being labeled as "racist" for naming race as a factor in the first place.

Honest dialogue that leads to resolution and new actions is entirely possible to achieve, but it does require a high tolerance for real talk and a real ability to handle reactions. Normalizing truth-telling from

different perspectives, developing individual and collective feedback muscles, and being open to emergent thinking are all helpful to alignment.

A white staffer at a funder network talked about "an explosive confrontation" that took place during a national meeting when a colleague of color pointed to the group's lack of inclusiveness and the feeling that the women of color carried the entire burden of advancing racial justice within the organization because its white members were doing too little. Even being in a curious, listening stance during such confrontations, rather than

RESISTANCE AND RESPONSES

RESISTANCE CLAIM OR SUBTEXT   **SUGGESTED RESPONSE**

STRATEGIC
"But is this really our mission?"
- Let the data prove the point.
- Show examples from the field.
- Name and work through scenarios.
- Bring in foundation leaders who have gone through this process to share their stories.

TACTICAL
"Won't that turn some people off?"
- Question assumptions about audience: Is it assumed to be white policymakers, partners, donors, impacted communities, or POC changemakers (and specific racial groups within those audiences)?
- Recognize that supporters may not have the same access to foundation leadership as resisters do.

WORKLOAD
"When will we have time?"
- Recognize existing choice points, and that seemingly deracialized processes are a choice to preserve the status quo.
- Discuss what can be deprioritized.
- Discuss how the process may seem a lot at first, but with time will be integrated into ongoing work and feel less overwhelming.

FEAR OF DISPLACEMENT
"What does that mean for my area or role?"
- Provide space for honest discussion and exploration of concerns.
- Work to recognize and realign roles; provide opportunities for training, development, and repositioning.
- Recognize that transitioning staff or board members may be a necessary requirement if alignment can't be achieved.

FEAR OF RACIAL CONFLICT
"Will I get called out? Will I have to call someone out?"
- Conflict is a natural part of this process.
- Strengthen conflict-resolution muscles.
- Prepare through training and coaching.
- Build strong relationships with the racial justice field.
- Name and work through scenarios.
- Build individual confidence about talking about racial justice, and work toward normalizing the conversation within the organization by creating different opportunities.

trying to shut down or avoid them, constitutes a step forward. "One colleague who was a woman of color expressed deep anger and frustration to me, a white woman; later, she told me how appreciative she felt of having been able to vent and be heard. I was able to hear the truth of my colleague's experience." The experience built trust and moved the group toward practices better grounded in racial justice principles.

In another example, the president of a family foundation spoke about a board that had always been committed to racial and social justice, eventually naming these explicitly: "But the board itself was reluctant to change its composition from being all-white and family only. One board member was reluctant to add people of color; her fear was that new people would come on and judge her qualifications—'You're

only on the board because you're family.' Not ignoring that led us to honest discussion about how we all got here, and what we bring to the table, and the value of all those roles."

There may come a point when it is clear that for any number of reasons, from active disagreement to a lack of skills for the challenges ahead, a staff person or trustee cannot or does not share an explicit racial justice lens. Proactively preparing for that possibility as a group (e.g., board, management team) and creating a fair process for a clean resolution will prevent separation conflict from overshadowing important gains.

Create Opportunities to Revisit and Strengthen Racial Justice Commitments

Alignment is an ongoing process. It doesn't end once you've achieved agreement, but instead has to be regenerated at regular intervals. The onboarding of new staff and trustees, for example, provides fresh opportunities to revisit racial justice commitments. Changing conditions may require rethinking portions of a foundation's strategy.

The stronger a foundation's relationship with people working in the racial justice field, the more likely it is to succeed in achieving internal alignment and conducting impactful grantmaking. Ultimately, the field is the best resource for proving that building power for racial justice works. Establishing a respectful, synergistic relationship requires bringing the field of current and potential grantees in on a foundation's current strategy and potential directions.

Grantees are the partners who are closest to the work, and their insights—while not all-powerful—should guide philanthropic choices, rather than the opposite. "Carry out foundation projects" will not be found in any grantee mission statement. Their work is to conceive and execute meaningful programs that will strategically improve conditions for their communities, including bolstering their power.

Foundations operating without a racial justice lens are missing critical opportunities, no matter the issues they work on, because racial discrimination is a factor in every arena. As an environmental funder noted,

"For decades, the mainstream environmental movement has not found a way to recognize the particular concerns of communities of color, who often faced more immediate serious harm from environmental depredation. The indifference to the experience of these communities effectively deprived the climate movement of the advocacy power these communities could have contributed. It comes down to the question of who gets to be an 'expert' and who gets invited to the strategy table."

One nonprofit leader talked about the experience of mutual respect between funder and grantee:

"Since I've been an executive director, I've been able to have direct, open, and honest conversations with program officers around ideas, challenges, even shortcomings that we are trying to overcome. Like—'Hey, this is what we are thinking, what we're doing. Here's the challenges we are having. Here is the initiative that we want to take'—and just giving their honest feedback. Like, 'Oh, yeah. I think this is good.' Or: 'I don't know. That sounds quite risky or too far-fetched.' 'Here's somebody you should talk to.' 'What if you reframe it this way?' That's been a beautiful thing."

Observing the dynamics of a grantee relationship built on a partnership orientation, a Black foundation program director said: "It has been a really powerful statement, that we are trying to reflect the work that they do. We know that often they have to hide it or contort themselves in ways that fit into a philanthropy agenda that doesn't say race. We want to be clear that it is our focus to eliminate structural racism."

AM I ALIGNING EVERY ASPECT OF MY FOUNDATION TO RACIAL JUSTICE?

A racial justice analysis for grantmaking needs to be grounded in a foundation that is working steadily to operationalize racial justice in every part of the organization.[5]

Use this checklist to ensure that a racial justice lens permeates all aspects of the foundation's work:

☐ **LEADERSHIP ALIGNMENT:** Foundation leaders, including trustees/board members, understand conceptually structural racism, power, and privilege; speak to how it shows up; and are willing to take risks and to ensure accountability for the foundation's actions with those most impacted, specifically communities of color.

☐ **POLICY ALIGNMENT:** We use racial equity assessment and impact assessment tools to develop policies that are informed by stakeholders, dismantle inequities, and create a multiracial and equitable culture.

☐ **PRACTICE ALIGNMENT:** Our theory of change for programs and strategies—that is, how they are expected to lead to results—as well as worldviews and assumptions, spoken and unspoken, are based on racial justice principles (e.g., focus on power building, movement strategy, intersectionality).

☐ **CULTURAL ALIGNMENT:** We assess how systemic white dominant culture leeches into internal policies and practices. Recently there has been more emphasis on identifying these characteristics, which is important to do yet sometimes ends up centering whiteness rather than integrating practices that center the voices and leadership of people of color. Centering people of color is about shifting power, control, well-being, and comfort to people of color.[6]

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5   Primarily from *Operationalizing Racial Justice*, Maggie Potapchuk.
6   *Five Ways to Center People of Color,* Erin O, Fakequity.

Invest in Racial Justice

The state of the art in philanthropy has evolved greatly in the past decades to recognize many critical best practices in grantmaking.

Over the last decade, there has been exponential growth in resources aimed at improving philanthropy and grantmaking practices, including crafting an accessible application process. Yet, the actual enactment of many perennially called-for practices still lags. The National Committee for Responsive Philanthropy's *__Criteria for Philanthropy at its Best__* publication lists three elements of effectiveness as "providing at least 50% of dollars for general operating support, at least 50% in multiyear grants and ensuring that the application time required of the grantee is commensurate with grant size."[7] According to the NCRP, only 15.5 percent of the foundations it surveyed met these criteria.

All of these often-stated best practices will also improve racial justice grantmaking, but multiyear, general support funding appears to allow the combination of stability and flexibility that racial justice organizations need to deepen, expand, or replicate their work within an effective ecosystem.

Funders working on racial justice commitments will need to decide what to fund and how to fund it. In the next section, which addresses what to fund, we offer the framework of a focus on power building, defining the impact of racial justice work. We also offer some potential course corrections around trending practices in grantmaking with a racial justice lens.

WHAT TO FUND: Prioritize Building Power

Racial justice cannot be achieved without dramatically growing the power of communities of color. The exercise of that power will inevitably generate conflict with existing power holders who may be part of a foundation's donor base, staff and trustees, or social and professional networks. In order to distinguish good strategy from the bad or nonexistent, and to be able to defend the strategic use of conflict, funders in this space need to be well-versed in the language and practices of grassroots and constituent power.

These elements of power are often reflected in the language of organizing. For this guide, we define organizing as a broad approach rather than any specific form of activism. This approach highlights the participation, decision-making roles, and visibility of the people most negatively impacted by structural racism, their confrontation of the decision-makers in multiple systems, and their work to build new norms, institutions, and systems. As one Black community foundation president observed, "It is not possible

to get to racial justice without changing the power dynamic, because the power dynamic is what's driving the inequity."

Much community and labor organizing produces direct action campaigns demanding institutional change, but the common element is participation and leadership, rather than a specific set of tactics. Racial justice activists use organizing methods to intervene in culture, politics, and economics—in short, in every arena available to the exercise of collective grassroots power.

Emphasizing power building for racial justice may change significant aspects of a foundation's grantmaking. The president of a women's foundation recalled that as the foundation was reconsidering its portfolio after examining race as well as gender data, its desire to support communities of color making structural change led it to a new pool of potential grantees that looked quite different from its previous set: "It means that we are funding smaller, more

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7   https://www.ncrp.org/about-us/philanthropy-at-its-best

grassroots organizations led by women of color, led by people of color; possibly impacting a smaller number of people, but with much more systems-change work and advocacy work—versus the grantmaking that we have done historically, which tends to be predominantly direct service with a tiny bit of advocacy sprinkled in here and there."

Several of the funders we spoke to have acted on this realization to expand the kinds of groups they fund. One community foundation president said, "We are trying to move our grantmaking in the direction of a balance between grantmaking that supports organizations that do service delivery [and] organizations that are actually doing organizing and movement building around issues. That has also caused us to make an assumption that we should not just be supporting C3 organizations, but supporting C4 organizations as well."

A white environmental funder noted that a power-building approach to that issue opened up new arenas of struggle:

"With the climate community's focus on technical issues, what got lost is the realization that you need political power to make every kind of change, and the way you build political power is by working on things that actually matter in people's lives. The justice-focused groups have a much stronger orientation around making people's lives better, informed by the lived reality of people in low-income communities and the multitude of stresses and challenges that they contend with, so it leads to solutions that are less technical around climate and more integrated into addressing other things that are related to climate."

The elements of a power-building strategy, described below, would also ground evaluation and progress metrics.

ELEMENTS OF POWER-BUILDING STRATEGIES

CONSTITUENCY
- Activating an impacted community
- Building disruptive economic, civic, or cultural power
- Siting decision-making power with constituent leaders
- Building structures for participation, leadership, and conflict
- Providing support and training for leaders

SYSTEMS FOCUS
- Race and racism examined in both diagnosis and solution
- Solutions not reliant on individual goodwill or charity
- Root causes identified
- Solutions institutionalized through policy or legislation
- Solutions can be leveraged for further change

FRAMING
- Values asserted in language, stories, images
- Points to history, root causes, and systems
- Centers the voice and experience of those directly impacted
- Sets new norms and introduces new concepts
- Emotionally resonant
- Enables action

TACTICS
- Diverse activities that build support, pressure the system
- May include research, community arts projects, direct action, boycotts, legislative lobbying, voter registration and turnout, protests, civil disobedience, petitions, negotiation

WHAT TO FUND: Redefine Impact

Reflecting on the effect of shifting to a racial justice lens in discussion with nonprofits, one foundation CEO shared that it opened up greater possibilities for defining success. During an analytic exercise with grantees, someone noted that tracking the root causes of community problems led to complex, long-term, "unwinnable" solutions. Confronting the dilemma that any real improvements would be impossible without structural transformation, the CEO said, "That was a stunning realization for me, that there was this 'winning' criterion, and that may be cutting off possibilities that we just won't explore." The ability to pursue such long-term goals is closely tied to the stability of an organization's money.

A Native American organizer noted the importance of relationships as an impact category:

> "Systems change is a complicated organizing process that is both objective and subjective. For Indian Country, the guiding principle is relationality. We are in relationship with others in our community, in relationship with the natural world, in relationship with the economic, cultural, political arenas. Philanthropy needs to assess their investment based on how the relationships develop: are they growing stronger, in a good way, with mutuality, reciprocity, respect—a values-driven, spiritually driven strategy. That's what they need to assess to see whether or not they're actually changing conditions on the ground."
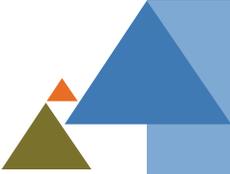
INDICATORS FOR SUSTAINABILITY OF RACIAL JUSTICE EFFORTS

Key indicators for the sustainability of racial justice efforts include:

- **the conditions for stable leadership** that can transition smoothly when the time is right;

- **a deep bench of leaders** within an organization, with adequate staffing and infrastructure;

- **broadening and/or deepening an active base;**

- **increasing power, representation, and agency among historically marginalized communities** by establishing sustainable, well-functioning institutions led by those directly impacted;

- **consistent alliances** that deepen, grow, and take on bigger projects over time;

- **growing knowledge of root causes and systems** among the constituency, policymakers, and/or the public;

- **establishment of specific policies** in public and private institutions;

- **shifting media coverage** of an issue or community; and

- **growing ability to raise money from diversified sources.**

A white foundation president reflected on the purpose of site visits in this context:

"Building power for self-governance and self-determination is a critical factor. How are the actual people who are affected by the issue making decisions and controlling the power within the organization? Who's on the board; who's on the staff? It's really talking to members and asking them, 'So if you have a problem, what do you do?' How do you say, 'I think this strategy is not going to work?' or how do you say, 'That's really not what I care about?' You can't do this from a written proposal. It has to involve people-to-people contact."

Impact-evaluation frameworks for measuring progress on racial justice should be developed in consultation with grantees. In addition to assessment of changing conditions for communities, impact measures in power building for racial justice include qualitative reflection on relationships, consciousness, and leadership capacity. Metrics should be developed in partnership with grantees and based on what they are trying to accomplish that you wish to support.

As one program director said, "We constantly have to be in that rigor, have to always ask: How are people of color being affected? What leadership are they bringing in this moment? How are they expressing how they understand solutions? Where are the structural challenges for them around race?"

WHAT TO FUND: Make Course Corrections

The proliferation of racial justice efforts in philanthropy has revealed several patterns that deserve examination. Inevitably, a field that is experimenting and innovating will find some of its results imperfect, even if it's all moving in a generally positive direction. Through interviews, observations, and discussions during PRE's program work, activists and funders identified some trends that require updated analysis and potential course corrections. These patterns may emerge from over-corrections or un-nuanced interpretations of racial justice principles, and can be hard to unearth when philanthropy has so few feedback loops that can act as a check or balance.

This is not a comprehensive list of such trends, but we name those that drew attention by how frequently they surfaced in debate and accounts of personal experience. In this section, we raise questions about several practices that are initiated for positive reasons, with a particular connection to ideals of advancing racial equity or even racial justice, but that may generate unintended and unacknowledged costs. We present questions that can guide consideration of funder-initiated convenings, collaborative funding models, support for predominantly white organizations, and the role of direct service in power-building strategies.

Do We Really Need That Convening?

So much of building a stronger racial justice movement involves deepening relationships, understanding, and

connection. It is natural that there was interest and encouragement from many organizations seeking to gather and find space to learn, strategize, and build together. It was also unsurprising that so many foundations sought both to strengthen their own understanding and to use their resources to help provide such spaces.

However, because convenings take grantees away from their primary work, they should be designed to optimize usefulness, planned in collaboration with grantee partners, and include the movement activists and leaders whom the field considers necessary. Wherever possible, grantees should have access to funds that enable them to convene themselves, with and without funders present. One Asian American activist said, "I can be on the road once or even twice a month for funder meetings and conferences. To show up somewhere for a day and a half, I have to take two days to get there and get home. That's almost four days where I could be raising money, connecting with my team, or planning our next big project. But not showing up is often not a real option."

In planning a convening, funders will benefit from applying an ecosystem analysis (described more fully in the Support Movement Ecosystems section on page 30), recognizing that grantees are in dialogue and community with a broad range of players that reaches beyond one foundation's current grantees. Activists want funders to collaborate with grantees and with each other in planning and hosting convenings.
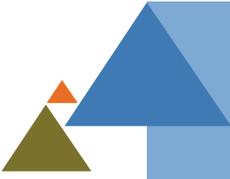
TO CONVENE, OR NOT TO CONVENE?

These are seven basic questions to ask about a potential racial justice convening:

1. Who called for a convening?
2. What do the callers hope to accomplish with this convening?
3. What is the position/power/role of those who we may be seeking to be convened?
4. If favorable, would their goals be the same as ours?
5. If favorable, do they want funders to join them?
6. Would a phone or video call suffice?
7. Are there better uses for the funds, time, and energy required to convene?

One longtime racial justice leader noted that it's unhelpful when a foundation has a convening of only its own grantees to tackle concerns facing the entire movement:

"It would be better if foundations first talked with each other, saw where their Venn diagrams overlap, and then invited people more broadly so that a gathering isn't grantee-specific. Because sometimes it's like we're in a particular fishbowl because we all receive funding from that foundation, and some of the partnerships or some of the relationships are mediated by that. It's great that we're together, but these other groups should also be in the room, and they're not because they don't happen to be funded by the same foundation."

In the same vein, inviting groups who are not grantees should mean being fair about expectations. In some cases, funders will invite a group of grantees along with those not receiving funds and expect non-grantees to take part in follow-up activities and other initiatives developed at the convening without any funding for their participation.

Convenings that create new relationships or expand skills get the highest marks. The activist cited above noted the benefits of a local foundation that gathered second-tier leaders among grantees for skill and

relationship building—one of the more successful foundation-led efforts. Another foundation that routinely gathered its grantee partners conducted training on how to handle contentious discussions about race.

To the extent that convenings lead to new collaborations or coalitions, funders must ask themselves if their presence is a help or a hindrance. A Black activist said, "Funder-driven collaborations are challenging. I think they're well-intentioned in terms of trying to get different groups to work together, relate to one another. But the best thing would be to figure out ways to support existing coalitions and collaborations, rather than starting new ones based on funding."

Funders should be extra careful about convenings. Because of the power differential with grantees, few are likely to say that they disagree with the need for convening—so funders have to listen for undertones that indicate grantee enthusiasm, or the lack of it.

The Philanthropic Infrastructure's Roles and Costs

Independent of a racial justice focus, throughout philanthropy there has been exponential growth in

layers of infrastructure in response to the sector's many needs. Funders routinely initiate new intermediaries, such as grantmaking collaboratives, networks, and formal philanthropic support organizations; communities or donors can give rise to intermediaries like public foundations.

These developments demonstrate the complexities of progress. While innovators can experiment with getting grants to smaller organizations through collaborative grantmaking and grantmakers of color often find helpful peer support in affinity groups, each layer of infrastructure brings substantial costs that require fundraising that may, in effect, undermine the goal of getting dollars to the field.

It is important to recognize that the first formal funder affinity group was born out of the racial justice struggle. The Association of Black Foundation Executives (ABFE) was created in 1970 when Black funders protested the lack of representation on the slate of the Council on Foundations board. Over the next five decades, hundreds of formal and informal funder affinity groups or networks formed, including those from other racial and ethnic communities, as well as countless issue-based and geographic-based associations. While there were some like ABFE that always focused on racial and ethnic community groups such as Asian Americans and Pacific Islanders in Philanthropy, Hispanics in Philanthropy, and Native Americans in Philanthropy, others also had strong social justice frames like Funders for LGBTQ Issues or Neighborhood Funders Group. As late as 2006, the numbers of other such organizations that had an explicit racial equity lens was not significant. Certainly, the number of those leading with this focus as a primary component of their work, while expanding, was still low. However, as the field evolved, and as organizations like ABFE, PRE, Race Forward and others intentionally partnered with many of these networks to strengthen their own approaches, the work has grown exponentially.

With the increased interest in society, shifts in staff, and more funding opportunities for expanding their work on racial equity, 51 percent of philanthropy-serving organizations (PSOs) polled in a recent survey by the United Philanthropy Forum said they were at an intermediate level of work on racial equity, 43 percent were just beginning, and a small number were advanced. In fact, it is difficult to find a funder association conference that doesn't elevate issues of racial equity or justice, something that simply was not the case even six years ago.

In addition to the funder associations that serve as peer networks, smaller, more formalized collaborative funds have also developed; they can have anywhere from two to dozens of foundation partners with specific regranting agendas. Collaborative funds can add value when they are thoughtfully crafted, ease relationships between funders and field, and rigorously assess their position in the movement ecosystem. Such funds can provide a low-risk entry point for donors to explore racial justice organizations; organize multiple foundations to respond quickly to important events; raise the visibility of communities, issues, or trends; share philanthropic power; and create a path for smaller organizations—especially regional or local ones—to engage large foundations.

Many funders appreciate PSOs and collaborative funds for peer organizing and collective learning. Through activities like briefings and site visits, they can expose staff at larger foundations, which often aren't set up to make smaller grants, to a rich new set of leaders and organizations. Funders working to generate support for grants that might be considered "too radical" within their own institutions can leverage validators through a relatively low-risk engagement.

Intermediaries or public foundations are also part of the philanthropic infrastructure that is particularly relevant to racial justice. These are often started in response to the needs of communities of color, women, regions, or communities with less support, allowing donors with shared interest to actively center movement needs over donor interests and build a real path for racial justice. They are typically in closer relationship and alignment with the field and are more willing to make investments that others working from a range of biases or lack of knowledge may view as riskier. One president of a private foundation said, "If you look at emerging grassroots organizations, often their first grant will come from an intermediary."

The leader of a Native American intermediary noted that regranting organizations often know best how to get critical resources out the door. "Our partners in philanthropy reach out to us and others to do that specifically because they know they can't," she said. "They don't have the contacts. They don't have the eye. It can be a really effective delivery model to help nurture the dreams and aspirations of the communities they're hoping to support."

PSOs, collaboratives, and intermediary or public foundations can also help bring new people into racial

justice grantmaking. An Asian program officer at a women's foundation pointed to giving circles among women of color as both a training ground and a donor expansion strategy. A private foundation and a funder affinity group created a pooled fund to support Native organizations doing racial justice and sovereignty work, with activists and nonprofit leaders joining professional grantmakers on the selection committees for each round of funding.

One organizer who participated as a reviewer described the effect of the process: "It was a brief moment of self-determination. A taste of sovereignty, looking at all of our peoples together and bringing my best self to the table to say, 'This is what we need for Indian Country as a whole'—getting out of that sharp-elbow mode."

However, in our research, racial justice activists and funders spoke of this growing infrastructure with a mix of appreciation and concern. The overarching questions from the field were tied to concerns of whether these were ultimately building more resources for work on the ground, whether the layers were increasing their access to relationships with funders or becoming a new gatekeeper, and where their accountability lay.

The question driving collaborative racial justice grantmaking has to be: "Is more transformational, sustainable money getting out into the field because we exist?"

This question implicates both hard costs, like the resources required for staffing a new organization, and soft costs, like the potential for inappropriate gatekeeping that limits direct access to foundations. For example, successful intermediaries are adequately funded (many collaborative funds set a minimum amount for membership) and adequately staffed—particularly with development directors, who are at a premium in the racial justice field. That reality creates both a hard cost (money to operate) and a soft cost (recruitment of development staff from organizations of color).
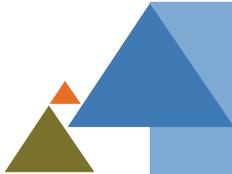
DO WE NEED A PHILANTHROPIC INTERMEDIARY?

These questions are important for any consideration of funding intermediaries, **but are especially useful for increasing racial justice resources:**

1. **Where is the impetus for an intermediary layer coming from?** Is it community-driven or funder-driven?

2. **If it is funder-driven, will the intermediary support organizations that truly could not be supported directly by the foundation or is it intended to avoid added burden, time, political energy, or risk?** If any of the latter set, have the costs of those tradeoffs been carefully considered, centering community long-term goals and needs—especially the need to be in direct relationship with larger foundations?

3. **What is the accountability mechanism for the intermediary?** Through its function, it will now likely have greater access to more funders than will the grantees it is tasked with supporting and yet likely will not have the natural accountability of a base. How is it accountable to a field versus soley to its funders?

Additional soft costs include the benefits of direct relationship with larger funders. Perhaps of greatest concern to racial justice activists and funders was the notion that funding collaboratives allow some funders to maintain distance from progressive organizations led by people of color. While there may be certain tactical reasons for such an approach, it may also block potential relationship building between communities and funders or cost activist groups the prestige that can be gained from being a trusted grantee of larger foundations. Other options, such as improving internal strategies to argue for direct funding, still need to be pursued.

To be truly effective in shifting funding trends, collaborative funds need to be closely tied to the field. But that relationship can also encourage gatekeeping, perhaps by creating a feedback loop with established activists and organizations or by erecting additional barriers for new or innovative efforts. A collaborative fund should never, for example, accept money that would otherwise go or is currently going directly to groups, or exempt funders from the expectation that they will invest in racial justice directly as well as through the collaborative. Some funds are geared toward moving groups out of the collaborative bucket and into direct relationships with member funds. One former leader of a funding collaborative said, "If you're not actually changing what the broader philanthropic sector funds, then you're just doing expensive grantmaking."

It is important to note the distinction between funding intermediaries. Some are developed to help organize and move resources to groups in communities or sectors. Others are rooted intermediary organizations, founded to support community and/or sector work and development—people-of-color-led institutions providing legal and policy research that are rooted in specific movements and/or communities, for example, or national networks of local organizing groups doing work together that are looking to pool expertise and resources in order to scale up their impact. These kinds of intermediaries are critical to the sustainable growth and development of the racial justice sector. Without them, organizations are asked to rely on predominantly white intermediaries that have limited experience working in their communities for research, strategic communications, fiscal sponsorship, and other support.

Lack of support for these organic, people-of-color-led intermediaries also tends to concentrate resources for racial justice at the smaller, local levels of grantmaking,

when all work—local, regional, and national—requires investment for a healthy sector.

Fund Predominantly White Organizations Only Under These Conditions

Over the past decade plus, as philanthropy recognized that so many existing institutional leaders in various sectors needed to increase their focus on racial equity, resources often flowed to support predominantly white organizations to diversify their staff and focus. In some cases, as racial equity became more palatable and "trendy," largely white organizations have been funded to create projects that move others in their field. Often the initial motivations to get many of these organizations to focus on race was the desire for reform, changing sources of money (moving existing resources), or simply the recognition that in order to be vital and relevant they needed to be more responsive to changing demographics. However, as funders have greater willingness to fund racial equity, there has been concern that they are more apt to fund change in the often predominantly white organizations with whom they're already familiar, rather than change the way they are funding to trust more organizations led by people of color.

However, a power-building approach to racial justice means that the goal of our grantmaking has to be self-determination and agency among communities of color themselves. Therefore, funding of predominantly white organizations to carry out racial justice work has to be contingent on rigorous criteria—far more rigorous than our interviewees had observed or experienced as common practice.

By predominantly white, we mean grantseekers whose decision-makers are majority white, which, depending on the organization's structure, could mean board members or executive staff. We do not conflate this definition with having a white CEO—there are organizations with CEOs of color that operate without a racial justice commitment. We also exempt from this discussion white groups that deliberately organize other white people to participate in racial justice struggles, which is work that was recognized as critical by both activists and funders in our research.

There is a long history of predominantly white organizations entering irresponsibly into racial justice spaces. According to funders and activists we

interviewed, one consequence of diversity and inclusion framing is that energy and money are directed toward predominantly white organizations to take on racial justice projects, including internal diversification efforts and externally facing program work. These grants may fund outreach to people of color, internal training, or an advocacy project related to structural racism, among other things. There are two common rationales for such investment: first, that as a result of white organizations waking up, communities of color can access and use their power and resources to build their own organizations; and second, that groups of color don't have the capacity to accept large grants or start a new body of work, so the engagement of a white group is required. The negative effects of such entry reshape the political and cultural landscape and can do lasting harm to the goal of building capacity and infrastructure that is owned and operated by people of color. These effects include:

1. Lowered standards and unearned credibility for white organizations that put wrong frames out into the world that gain traction because of their access to media and social capital, or whose good work fails to credit adequately the people and organizations of color that helped make it so.

2. A drain on the capacity of leaders and organizations of color whose work the white organization uses to create its own products. It is highly unlikely any predominantly white organization is proposing to conduct racial justice work without seeking guidance and input from organizations, intermediaries, and leaders of color that have been working, sometimes for decades, to build their base of people, knowledge, and legitimacy.

3. White organizations that focus entirely on internal diversity efforts, but have no commitment to changing their strategy and program for racial justice goals, or—as we also see—the exact opposite: white organizations creating external products, but not addressing their own demographics and internal power relations.

4. Unchanged relationships, or even a growing gap between people of color working on racial groups and the funders who become interested in that work. Grants to white organizations can further consolidate their access to funders while continuing to shut out groups of color that can't get a meeting.

Many racial justice funders see access and capacity rationales as simply a dismissal of the leadership of people of color. A Native American funder said, "Capacity [is] a code word that we've learned over these last twenty, thirty years, as being, I guess, 'She's a little bit brown. A little bit too Black. You're probably just a little bit too this or that.'" These arguments can also constitute a self-perpetuating belief among funders who fail to recognize existing strengths in organizations of color and then create the very capacity shortfalls they aim to work around.

White organizations sincere in their desire to engage racial justice still may be unaware of what is actually required to align their programs, operations, leadership, and culture to contribute well to the ecosystem. "If I were a funder who was asked to fund change at a predominantly white organization," a white president of a private foundation said, "I would need to have a very high level of confidence that the people were aware of what they were actually asking of themselves, and willing to take it on." Indications of this high level of commitment include an active commitment to using a racial justice lens in crafting strategy, usually developed through trusted partnerships with organizations and communities of color, with commensurate internal change—hiring, culture, decision structures—to implement the strategy.

Some white organizations will argue that they are the best messengers to change attitudes and actions in their predominantly white field (e.g. health, environment, economic development, the arts). That is a different conversation than mobilizing white communities to support racial justice principles and policies, and it obscures the need for intermediary infrastructure built directly in and with communities of color in ways that institutionalize their expertise, solutions, and approaches. The usual flow of money goes from a foundation to a white organization, and then to an organization of color in the form of a contract or stipend (if even that). On occasion, we see white organizations subcontract with an organization of color to produce research or strategy, which is then credited to the white organization rather than to the creator of color. By credited, we refer to the social and political capital that results from the product, not solely to the people named in bylines.

While contracts may "compensate" the experts of color in a narrow sense, they do not cover the true cost of meeting the white organization's needs. Those true costs would surely include the opportunity costs for the
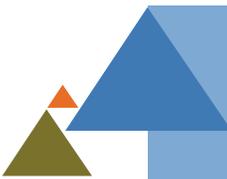
CRITERIA BEFORE FUNDING PREDOMINANTLY WHITE ORGANIZATIONS TO DO RACIAL JUSTICE WORK

Foundations considering support for predominantly white organizations on racial justice should first ask themselves these questions:

1. Is there an organization of color working in the same space or are there other investments that would build power and self-determination for communities of color directly?

2. Does the grantseeker understand the scale of change that would be required to become a truly multiracial organization and operate with racial justice values?

3. Has the grantseeker made investments in change work through their general operating funds, and have they ensured the work remains a top priority?

4. What would be the actual benefit to communities of color of the white organization's entry or expansion in racial justice; which communities, issues, or solutions would be elevated, for example?

5. Has the organization shown enough progress and a unique enough contribution to the work to justify continued racial justice grants?

6. Do they have authentic and lasting relationships with communities of color?

If after considering all of these criteria, investments in predominantly white organizations seeking to advance racial justice and equity still seem worthwhile, funders and these nonprofits should still consider how to operate in ways that offset the systemic inequities they are purporting to challenge. These are a few options:

1. Predominantly white nonprofits working on racial justice can introduce their POC partners directly to their funders, either in joint applications or to independently apply.

2. If the white nonprofits in a sector need training support, funders can send grants directly to respected racial justice training organizations to partner with the institutions that meet criteria as being both strategic and committed.

3. Any grant applications from predominantly white nonprofits for racial justice work should show how much of their current and projected core funding will be aimed at that work independent of the supplemental support they are seeking. It should simply be a non-starter if work on equity and justice is only happening if this group can get added funds to do it.

people of color—are those contracts taking them away from their own work? Additionally, the initial frames and final decisions come from the white organization, so the people of color who are brought in have to spend intellectual, physical, and emotional energy either catering to frames with which they don't agree or correcting them at the risk of being labeled "difficult."

Another way funders have been supporting their predominantly white grantees to shift is not with added grant dollars, but providing direct access to tools and resources. The following example reveals a positive, fruitful intervention in which a foundation's actions pushed a predominantly white grantee. A place-based foundation provided consultants to help grantees with understanding structural racism, eventually building a racial-impact assessment tool into its RFP. The foundation itself uses the tool to build shared analysis and a suite of solutions. The foundation provides a workshop on how to use the tool as a free service to local organizations; even those that don't apply then still get exposure to the language and practice of racial justice.

The president of this foundation tells a story of a white-led, very progressive advocacy organization that had kept a bit of distance from the foundation's racial justice focus. She received an email one day from the executive director, noting that the program and development staff were working through the impact assessment together. "I thought, 'Okay, cool, interesting.' Then, when I read the proposal, I was so shocked." The group proposed to expand its traditional agenda of advocating for more housing vouchers to address bias and discrimination by landlords through local policies. "They were naming a long history of housing discrimination," the foundation president said. "I was shocked to see this acknowledgement coming from previous resistance, and actually going from acknowledgement to 'here's what our policy work will look like this year.'"

Another circumstance that warrants positive consideration may appear when a new CEO of color takes leadership of a predominantly white organization. If the new CEO intends to move a racial justice agenda, it is critical that board, staff, and funders prepare to stand behind that person, rather than taking the "wait and see" attitude that frequently accompanies these leadership transitions and often jeopardizes their success. But it is entirely possible that a CEO of color doesn't want or won't be able to change decision-making norms or structures. The criteria questions

above should be applied to largely white organizations even if they have CEOs of color, examining changes to program, culture, and practice beyond a single— though undoubtedly significant— hire.

Does Direct Service Fit in a Systems-Change Approach?

There has long been a false dichotomy between direct service provision and organizing. Grantmaking with a racial justice lens does not mean cutting direct service providers from a racial justice-oriented portfolio. Instead, it should support flexible approaches to organizing that build power, whether it uses aspects of direct service provision or more recognized tools such as canvassing and rallies.

A Black president of a private foundation shared the metaphor of saving babies from the river with her board as they were seeking to impact systems change: "Do we stand downstream to pull them out, or try to prevent them from falling in the first place—to engage grantees in examining root causes and challenge the either/or notion of support for policy versus direct service. It's not just a relocation to focus on policy but to really have an understanding that folks in the community are the ones to solve the root causes of the problems with the resources. And that folks working in direct service often are extremely knowledgeable about what those root causes are and what the systemic intervention should be."

The national Building Movement Project notes in *Social Service and Social Change: A Process Guide*, that most direct service organizations already adopt missions related to ending the suffering caused by inequality and injustice; that they come into contact with thousands of directly impacted people, which gives them a close view of how the systems play out; and that the U.S. social service network is massive and varied. This guide advises social service providers on a process to shift their interaction with service seekers to seeing them as consumers rather than clients and then ultimately, as constituents: This allows them to both be a vital lifeline as well as address larger systemic issues. The Guide notes:

> "Addressing these larger systemic barriers is a daunting task, especially at a time when so many service providers face growing demands and reduced funding. We believe that a way must be found to meet clients' day-to-day needs as well as to change the circumstances that currently reinforce
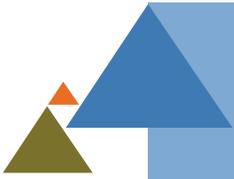
To determine the role that direct service organizations play in a racial justice process, these are helpful questions to ask:

1. **What do they think causes the problem?**

2. **Do they see the people they serve as agents of change?**

3. **Are they in relationship with organizing or advocacy groups?**

4. **Do they introduce the people they serve to systemic analysis or advocacy groups?**

inequality, injustice, poverty, and lack of access."

Community and labor organizers have long seen service as a key tactic. Some of the most important organizing efforts—like the Black Panther Party's breakfast program and the United Farm Workers' pantry programs—used direct services as part of a comprehensive approach to power building and change. Racial justice organizations across the nation either provide direct services in some form themselves, or work closely with other organizations to craft and execute winning strategies. One organization runs adult literacy classes and a little clinic alongside its civic participation program. Another runs exercise classes and summer reading programs.

Sometimes a proposal that looks like direct service comes from an organizing approach. An education funder told a story about receiving an application from an immigrant organization for funding to set up a program to train and place Spanish-speaking mothers as volunteer classroom assistants in their children's schools. The funder thought at first that the project had no relationship to power, or maybe even exploited the labor of immigrant parents. But further inquiry revealed that the program was designed to create regular and direct access to teachers and administrators for monolingual immigrant parents. Their growing base of knowledge then allowed parents to advocate effectively for the measures their children needed to succeed.

HOW TO FUND: Support Movement Ecosystems

While a foundation may focus on a particular constituency, issue, or strategy, a holistic view of all the factors that affect a community or an issue is critical to carving out a specific contribution. Funders in multiple fields have considered how they related to a field's ecosystem—how they could work together to build and sustain the field of arts education, healthcare, or economic justice, for example. The racial justice ecosystem has a specific set of assets and obstacles, its own conventions and innovations, and its own dilemmas to navigate.

No community is monolithic: Age, gender, sexuality, nationality, geography, ability, and class are only some of the additional factors that affect how a person of color experiences life. A structural analysis requires thinking in units larger than a single organization, issue, or strategy. Deep analysis reveals that racial injustice is generated by multiple institutions, layers of laws and regulations, cultural as well as political actions, and deep histories of conflict between communities. Therefore, racial justice implicates multiple arenas of life (economic, political, cultural), both public and private

institutions, and new forms of cooperation between communities. Turning our gaze to the larger ecosystem is useful because it reveals the particular impact of each intervention in the context of the other current and potential interventions.

Relating well to an ecosystem entails a kind of effort that's often not specifically recognized in traditional grantmaking practice. A funder whose work led her to an explicit understanding that she needed to support movement building identified a number of women who acted as "connective tissue" among organizations; this work went beyond their official roles and titles and was essential to creating a sense of unified purpose and cooperation across the field. This grantmaker lifted up their work to her board, which then decided to offer several of the key women's organizations $10,000 apiece in unsolicited funding in recognition of their important role.

The Asian American executive director of a place-based family foundation described how a movement ecosystem orientation elevated the importance of relationships among organizations:

> "Given everything that has happened in the last ten years, racial justice organizations are units of movement that are so important. We need them to be strong. We also need to align them and have a better way for these organizations to be in relationship with each other. How do people actually hold each other? How do people understand, live, breathe what solidarity looks like? That is also critical work that has to happen and it has to be invested in and thought about and strategized about as seriously as we strategize around a campaign."

Several funders, including that of the executive director quoted above, have responded to leadership burnout among racial justice leaders by prioritizing peer support that sustains people over decades. These grants not only invested in organizations, but also allowed individual leaders to rest, engage in lifelong learning, travel, and build relationships with other exceptional leaders who act as "connective tissue" for a movement.

Foundations also help to determine how collegial or competitive the organizations within an ecosystem will be. A Native American organizer noted that deep underinvestment in Native communities has

driven unnecessary fissures that are preventing the consolidation of multitribal Native power: "Because less than 1 percent of philanthropy is given to us, we operate in a culture of scarcity where the elbows are very sharp. It's such a small pie that we have to push each other out of the way to get a sliver."

In addition to support for the ecosystem at the level of groups within various communities and their intersections, it is also important to look at the strength of the various sectors and capacities required to be effective—the capacity to communicate and tell stories, for example, or technological capacity.

The racial justice ecosystem is made up of many ecosystems—some place-based, some multisector and global. The underdevelopment of key expertise (due to centuries of underinvestment and disinvestment) has meant that groups of color are often forced, often by funders, to work with culturally incompetent technicians for critical needs: Black liberation organizations that contract with all-white tech teams, or people-of-color groups that must invest their hard-won resources with white development firms, often with poor results and little accountability. These are just a few examples of why an ecosystem perspective also means working with groups and emerging networks to build out needed sectors and capacities that support and strengthen the work overall.

Foundations may not choose to address every aspect of this holistic view, but they should be able to help build a philanthropic ecosystem that matches the fullest needs of the field. Keeping the movement ecosystem in view allows us to see other opportunities to be helpful beyond a specific portfolio.

A funder who knows that her resource constraints won't allow her to take on every worthy new applicant communicates very early in the process when she knows she will not be able to fund them. Recognizing that these groups are already structurally disenfranchised, she respects that their time is too limited a resource to be wasted on an application process that will bear no fruit. At the same time, she makes efforts to connect them with other possible funding sources and establish partnerships in the field.

Constituencies

A holistic view of the people who need to be organized or supported includes understanding how the complex mix of identities and systems of hierarchy affect individuals. **Complete racial justice requires seeing communities of color fully, and realizing that our experiences are further shaped by other parts of our identities. Simply put, people of color hold identities in addition to the one that interests a funder.**

"Our grant partners are working with folks who are also parents," said the Asian American director of a private foundation. "They're churchgoers. They're people who are renters or want to be homeowners. They're people who have chronic illnesses who need healthcare. We fund only one portion of their impact. How do we then talk with other foundations that do things we don't, like healthcare funding?"

A Black activist noted that an intersectional approach[8,9] to racial justice requires understanding how various systems overlap to generate compounded harm, and how they could overlap to generate positive outcomes instead: "We have a focus on criminalization, but we can also talk about our work as it relates to gender justice and economic justice and racial justice."

The complexities include the varied relationships that communities of color have with U.S. governments or corporations. For example, Native Americans, unlike anyone else, relate to the federal government as nations. One activist said, "We need racial justice to make good on our legal rights as sovereign nations, but because we are a nation within a nation, we also have to negotiate that status." One implication, this activist noted, is the complexity of the movement ecosystem in Indian Country. "Because treaties are in force but unfulfilled, we have to engage philanthropy. We were guaranteed healthcare from birth to death, but it's denied us as it is to the overall population. Tribes are running education, housing programs, healthcare, infrastructure like water and highways. How are they investing in the ecosystem that is Indian Country—Native organizations, tribal governments, service providers, both urban and on the land base?"

Groups that organize around one or more identities can find themselves unable to escape perceptions of their appropriate funding "silo." An Asian LGBTQ activist noted the very real challenge of so many organizations

when funders—and in reality, many of the organizations within specific communities—fail to effectively incorporate an intersectional racial justice lens: "With LGBT funders, there's a reality that the majority do not center communities of color and racial justice. On the flip side, when we are approaching racial justice funders funding communities of color, it's a real challenge for us to even get in the door because there's such a perception of LGBT work as being white and as not having a racial justice lens to it."

One funder of LGBTQ issues made an explicit decision not to focus on state-based policy campaigns, but instead to build a portfolio around particular constituencies. The decision allowed the foundation to support a wider range of work led by and serving people of color. The range of issues this constituency takes on looks substantially different from those supported by more mainstream and whiter LGBTQ organizations—they included addressing not just bullying, but also the criminalization of young queer people who are both bullied and victimized by punitive discipline policies. "There was really no way for us to respond with our grantmaking and other programs without acknowledging the other aspects of their identity that had implications for solutions that would help improve their lives," the Latinx funder said. "We understood that you could advance policies and yet people could still not have improved lives."

Issues

Recognizing that many foundations choose their issues out of donor interest, organizing grantmaking by issue areas can meet foundation needs and contribute to racial justice ecosystems. Foundations are often attracted to issue-based efforts because they can track outcomes and hire experts to shape the grantmaking based on deep knowledge of field debates and relationships. But issue-based portfolios also have downsides—among them, limiting the flexibility of racial justice groups whose primary goal is power building.

One education funder combines an issue focus on education with a strategy of grassroots direct-action organizing. A grantee could be working on any aspect of public education systems as long as it can relate that aspect to power building and racial justice. The ecosystem of grantees that this foundation supports works on a range of education issues, including school financing, juvenile justice, and surveillance in schools.

8   *A Primer on Intersectionality*, African American Policy Forum
9   *How to Do Intersectionality*, Rinku Sen

But groups focused on power building tend to move from issue to issue over time depending on where they see the best potential for the exercise of community power. Also, like a narrow constituency focus, issue-based portfolios can marginalize organizations and campaigns that fit in multiple categories, only to be rejected because they do not fit neatly into the existing issue strategy.

Strategies

Funders who have moved from issues to a strategy focus have done so partly out of respect for the self-determination and leadership of grantees. Holding power-building strategies or the movement ecosystem as the "center" allows some foundations to address multiple issues and needs.

When the new president of a private foundation that had worked traditionally on reproductive rights and worker organizing came across a group organizing pregnant workers, she was positive it was a doubly good fit. The organization's stories were compelling, it had a real base of women, and it addressed root causes of pregnancy discrimination, fitting in both reproductive justice and economic justice. "I thought, 'check, check, check' on all our criteria," she said. But the group was rejected. "The reality of the practice internally was that it didn't get picked up by either one."

In debriefing this example, the foundation's board and staff concluded that their issue areas created constraints that actually worked against their stated values of trusting grantee leadership. "Does it really make sense for us to decide what's most essential, to set the agenda?" the president asked. Engaging grantees revealed that issues were less important than the strategy grantees were pursuing. Issues changed, but grantees held a core strategy of building community power to tackle whichever issues energized the base, involved institutions that were vulnerable to community pressure, and offered space for solutions they could expand upon: "When we asked how they talk about their work when they're talking to their communities," the foundation president said, "people consistently came back with, 'When we talk to our communities, we talk about building power.'"

A TRIED AND TRUE PATH FROM ISSUES TO STRATEGIES AND ECOSYSTEMS

1. **CLARIFY VALUES:** Identify what is essential to preserve and what motivates both trustees and staff.

2. **LOOK TO THE MARGINS:** The organizations and work at the margins of current issue portfolios will likely reveal intersectional problems resulting from multiple causes.

3. **TALK TO THE GRANTEES:** Ask what would happen if you shifted from issues, and note the various strategies the grantees are using—not just the issues.

4. **CREATE A SINGLE PORTFOLIO:** Craft one portfolio that all program officers work on. Shift grant-tracking tools accordingly.

5. **COLLABORATE:** Build a collaborative staff structure and culture.

6. **INCREASE PAYOUT:** Consider increasing payout to be able to create fair transitions for grantees.

The foundation eventually eliminated issue portfolios and restructured its staff to emphasize expertise on organizing and social change, which the foundation calls "movement building." The shift has created a more collaborative culture that relies more on close teamwork than on the issue expertise of any member. The reorientation to a grassroots strategy revealed new aspects of even longtime grantees, including the full range of issues they worked on and where they fit in a larger movement ecosystem. It also gave them a clearer view of that ecosystem and specific gaps in the racial justice and progressive infrastructure, such as the lack of well-supported Black-led organizations.

HOW TO FUND: Ease the Burden on Grantees

Mounds of philanthropic research confirm best practices that support grantee stability and growth as well as constructive, trusting relationships between grantees and funders. General support, multiyear funding, a streamlined process, and reasonable reporting requirements are good for all groups. But organizations of color and those tackling racial justice can be particularly harmed by the lack of best practice because they are often deeply and disproportionately under-resourced. In choosing their own practices, foundations should accept an appropriate portion of the burden for the work required to make a grant.

This type of under-investment by philanthropy can add strain even to groups of color with high capacity, particularly among those that have achieved it on some measures at the cost of others, such as fewer staff members to manage development or back-office operations. To be clear, a deficit mindset is a persistent challenge in the field, and across the grantmaking landscape capacity building is recognized as fundamental to impact. And there are some racial justice organizations doing their work with sophisticated development operations and significant assets. But the uneven playing field is a fact: The percentage of annual grant money for African Americans decreased from 21.8 percent in 2005 to 17.5 percent in 2014. For Indigenous peoples, it went from 5.8 percent to 4.2 percent; for Latinx people, it went from 14.9 percent to 14.8 percent; and for Asian Americans and Pacific Islanders, from 3.5 percent to 3.7 percent. Those working on racial justice explicitly receive even less—of overall giving in 2014, only 1.7 percent was for grants with explicit racial justice language.[10]

Beyond the disproportionate impact of bad practice, some grant processes constrain grantees whose lens differs from those of elite foundation decision-makers (of any race). Many long-established foundation practices took shape in the context of an overwhelmingly white business, philanthropic, and nonprofit culture. Foundation processes, just like those of other institutions in the context of structural racism, reward the organizations best able to code switch or adapt to the pace, language, media, and images that fit within mainstream culture. Even when program officers and CEOs are people of color, they often need to communicate context, rationale for support, or program objectives to others who operate in ways that marginalize community practices, such as specific modes of communication, or that exhibit predominantly white cultural biases and conventions.

While there is clear value in ensuring racial and ethnic diversity among grantmakers, these identities don't guarantee a racial justice lens. A racial justice lens sees time as a key resource, and seeks to expand that resource among grantees rather than extract it through excessive scrutiny or lack of preparation. Typically, a foundation has more flexibility to shift practice than a grantee will have to shift workloads to manage fundraising. It is the grantmaker's job to manage that process without shifting an undue burden onto the grantseeker. In one example, a Black program officer recalled a grantee unable to submit a proposal because of multiple ICE raids affecting its constituency: "They had to work with communities underground that were in a state of trauma and chaos," she said. "Their docket was coming up and they were not able to get me a proposal on time. I realized that my timelines do not matter in the broader context. I could move them to another docket. Our job is to get the money out the door. It's not to penalize organizations for dealing with a real-world event."

When shifting to a new practice, collect grantee input. For example, many foundations have adopted Fluxx or other automated systems for uploading proposals and reports. These programs tend to limit word and

10   Philanthropic Initiative for Racial Equity, Race Forward, and Foundation Center. (2017). _What Does Philanthropy Need to Know to Prioritize Racial Justice?_

character counts. While this may feel no different from an analog page limit for proposals, a strict character count can easily eat up an hour or more to manage—time the grantee might have used for organizing or recruiting a new donor.

The guidance appearing in Box 5 is based on interviews with activists about their favorite foundation practices, those that they feel genuinely ease access and build real relationships with grantees. A partnership approach to grantees means not viewing them as the foundation's contractors. Indeed, the foundation could see itself as the service provider to the grantee, and aim for great customer relations by making the entire process as easy as possible.

Increasingly, as funders try to deepen their relationship to and understanding of racial justice, they can and
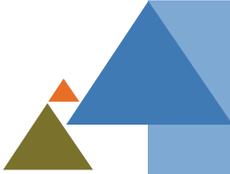
INCREASE ACCESS AND LESSEN BURDEN IN RACIAL JUSTICE GRANTMAKING

EXPANDING ACCESS TO RACIAL JUSTICE GRANTS

1. **Be explicit about racial justice,** so groups know you're open to that topic.

2. **Limit questions to those required for grant decisions.** Avoid the interesting but extraneous.

3. **Offer application support** (e.g., a "how to apply" webinar).

4. **Give adequate preparation time.**

5. **Allow a conversation to replace a written application or report.**

6. **Avoid strict character-count requirements.**

7. **Adopt a common grant application with similar foundations.**

8. **Provide at least 25 percent for infrastructure in project grants** (instead of the typical 10–15 percent).

9. **Research the grantees and leaders applying for grant money.**

10. **Limit site visits;** when they do occur, cover costs for staff, lunch, etc.

11. **Seek grantee recommendations outside of your usual circles.**

12. **Avoid requiring convenings or collaboration as a condition of funding.**

13. **Support collaborative projects as well as individual grantees.**

14. **Provide feedback if the grant is not approved.**

REDUCING THE BURDEN AFTER A GRANT IS MADE

1. **Use identical language** on reporting templates and online proposals.

2. **Don't word reporting templates with the presumption that a predominantly white organization is trying to diversify its work.**

3. **Require one final report** instead of a series of written progress updates.

4. **Employ evaluation for larger grants,** not for smaller or single-year grants with no likelihood of ongoing traction.

5. **Offer stipends for grantee conversations or board check-ins after the grant is made.**

6. **Weigh the benefits of funder-driven learning communities;** despite positive feedback from some grantees, they are costly in terms of time, energy, and opportunity.

should reach out to new or potential grantees. In doing so, however, they need to be aware of their "magic megaphones." To a grantee or potential grantee, there is no such thing as a casual question from a funder. Take data collection as one example: Activists are often asked by funders for information—sometimes not even their own—and must scramble to find or create it. One activist told a story of meeting one such request, only to receive no acknowledgement or follow-up on the data. Funders seeking data to make a case or craft a strategy should do all they can to find that information themselves.

Immediately after the 2016 U.S. election, a South Asian organizer was jumping into Muslim defense and planning to proceed with or without resources. He received a call from a new foundation contact seeking information on his organizing of Muslim communities. At the end of a forty-five-minute call, the funder said, "I think it will be approved."

"Approved for what?" the organizer asked.

"A rapid-response grant," the funder replied. "That's what this call was for."

The organizer realized that he hadn't read the original email closely enough. "Okay. So, when do I submit a proposal?"

"No, this call was a proposal," the funder said. "We're going to run it by leadership. You will have our response by next week, but I think you are in a good place."

The grant was approved a week later. "Really, as an ED, money never leaves your mind," the organizer said. "In that moment I thought, 'Okay. I can take it out from the back of my mind and just completely out of my mind.' It allowed us to focus on the work."

HOW TO FUND: Be Accountable to the Racial Justice Field

Debates about the role of philanthropy in a democratic society have existed since John D. Rockefeller applied for a federal charter to start the Rockefeller Foundation. People worried that government responsibility, which by definition involves public scrutiny, would be replaced by philanthropy and thereby allow the wealthy too much influence through their charities on national discourse, politics, and the economy.

In recent decades, the entry and rise of people of color in philanthropy have combined with efforts by groups and coalitions of color urging antiracist practices or specific support for racial justice organizations. Some of these interventions are framed positively: "We would like you to do it this way." Others are more critical: "You messed up and need to fix it." While some foundations have made tactical or even strategic changes, they have done so entirely voluntarily because there is no actual requirement to be responsive to grantees or the field.

The law requires little of the sector beyond an adequate annual payout for program purposes. There is no professional licensing for grantmakers, for example, that could be revoked in the case of unethical behavior. There is no peer- or grantee-review body that can adjudicate conflicts. This lack of accountability surely contributes to, if not causes, vast disparities in philanthropic dollars going to communities of color, whether or not those dollars are intended to support racial justice work.

Identify Ways to Structure in Accountability

The onus is on the foundation itself to go beyond the law or convention, to be in close contact with the field, to open the door for critique, and to realize that the power dynamics will inevitably limit the candor with which people raise issues. Some foundations have addressed this problem structurally. A family foundation might add independent trustees to its board, or a public foundation may create a grantmaking committee or community giving circle that engages the constituency itself in decision-making.

Even with Diversity, There is a Need for Intentional Humility and Listening

Others hire people of color from affected communities. However, former organizers and activists who became funders noted that they have to maintain humility in their new roles. One Black program officer said,

"I'm coming from a space where you are used to soda, cold pizza, and paper plates, and now I come into a space where there's china, where lunch is prepared by an on-site chef. Just the amount of resources at our disposal is a head trip. If you do not remain humble and self-reflective, you will lose all credibility that you have coming from the field. Having access to these resources, you almost begin to take it for granted. I check myself. I am very clear that I am not in the field anymore. I am not doing that work."

Another grantmaker noted that over the course of her career, she's been deliberate in spending time on both sides of the money. "It's been really important that I haven't spent my whole career in philanthropy," she said. "When I left the last foundation, I raised money; so, it's in my recent memory what it's like to ask for resources."

Be Honest About the Power Differential and its Impact on Relationships with Grantees

Even for funders with the most accessible demeanors, the power imbalance between foundations and grantees remains a fact. "We try to be in deep, honest relationships so that people on the individual level can hold us accountable," said the CEO of one private foundation. "I don't think it's possible in my position to say, 'I have an open door with my grantees,' or, 'I have such good relationships, so if I was doing something wrong they would tell me.' At the end of the day, this new program we're doing, it could be really stupid, and who's going to come and hold me accountable for that?"

Foundations that are willing to listen harder can move past missteps and actually adopt new practices. One Latina grantmaker told of organizing a conference with another funder on youth and justice issues,

fully intending to respect activist voices and elevate organizers and the experiences of impacted communities. Just before the conference began, they heard that a number of people were upset with the agenda and intended to take the mic at the start, even though some of those with objections had participated in the planning. The subsequent conversation was revelatory, she said: "We thought we were being in real community with folks. Someone even told us, 'We don't understand why you bring people together. Why not just give us this money in a grant?'"

The funder observed that the field has higher expectations for funders who are people of color: "That tension is real. What does it mean to be in this role and in this community, and yet from this other space as well?" In planning a new gathering on another issue,

this person has tried to engage communities more proactively through a clear advisory structure, so the community can own the convening more. "We have been super-mindful of the role that the grantees play," she said, "everything from helping us think through workshops to picking the workshops to describing the workshops, to see if that helps even out the power dynamics a little bit. We'll see."

Philanthropic accountability is no less important for being voluntary. Foundations that want to make positive contributions to the racial justice ecosystem ultimately have to set standards that are based not just on their values and intentions, but also on an accurate read of the racial justice ecosystem, which comes from deep relationships with groups and leaders in the field.

Critical Questions to Ask When Selecting Tools and Resources for Aligning Your Foundation with Racial Justice

By Maggie Potapchuk[11]

Often when foundations embark on operationalizing racial justice, one of the many questions that comes up is, "What tools or frameworks should we use?"

New grantmaker-focused tools, resources, and frameworks are being developed frequently, but many already exist, including those outlined here, that can be helpful throughout the racial justice change process. At the same time, it is essential for internal expertise and wisdom to be prioritized—especially that of staff of color—to create, innovate, and share their truths and ideas on integrating racial justice. Listening to and centering this internal wisdom, as well as those of stakeholders and residents of the communities with which a foundation is working, are critical tools that drive racial justice.

Answer these four important questions to pick the right tools and resources

As foundations' leaders align operations, culture, and grantmaking with their racial justice values, they can sift through the many resources available with the following questions.

1. Does your organization have shared explicit language and concepts?

The first element of creating alignment is getting to shared language and concepts of structural racism, power, and privilege, and to a shared view of root causes.

Many of the tools we suggest in this guide require a common racial justice analysis before a foundation can begin co-creating an action plan. See the "Test for shared meaning" sidebar on page 12 for a sample of questions that foundation leaders can ask to assess the level of shared understanding of key concepts among staff, board, and other internal stakeholders.

2. What are you hoping to gain from the tool?

It is important to be clear on your intent for a tool. Is it to gain clarity, knowledge, or buy-in? Is it to collect data?

Sometimes adopting a tool brings with it the assumption that the tool will result in an easy fix of the challenges in the change process. But what is really needed is to slow down the process and begin listening. One of the ongoing tensions in racial justice work is its urgency; and yet an organization can get caught up in defining and achieving an arbitrary set of deliverables and outcomes. The racial justice change process, however, needs to be emergent and adaptive to reflect the growing needs within the organization. To advance racial justice, an organization must center equitable and inclusive processes and relationships and invest in building staff knowledge, skill, and confidence while ensuring that those who are most impacted are informing and leading.

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11   The collections of tools and resources were primarily written, as well as collected, annotated, and, in some cases, developed, by Maggie Potapchuk of MP Associates. Over the past decade, she has partnered on several projects with Gita Gulati-Partee of Open Source Leadership Strategies on supporting organizations in the philanthropic sector to operationalize racial equity. Some of the points made and lessons learned reflect their collective work.

Racial justice work is messy. This is why sometimes it gets compartmentalized, internal roadblocks are created, or an external consultant will be hired to accomplish a deliverable rather than to support staff and trustees in doing the heavy lifting necessary to sustain the work.

Clarity on what your needs are and who will lead and provide necessary support is important to achieve upfront.

3. How do I know if a tool or framework is using a racial justice analysis?

You need to ensure that all tools being used reflect your racial justice analysis and that they pay attention to power and privilege. Here are a few questions, including some from the tip sheet *Reviewing Resources*[12] from www.racialequitytools.org, prior to adopting a tool or a framework:

- What seem to be the assumptions about how change happens?

- Does the tool include discussion of addressing privilege, racism, oppression, and power?

- Does the tool acknowledge the existence of persistent differences in power, life experiences, and perspectives among various racial/ethnic groups, or does it assume there is a single worldview or that all people have roughly the same opportunities and challenges?

- Are terms such as "diversity," "racism," and "inclusion" being used interchangeably or with precision?

- Does the tool take into account power in the context of structural racism?

- What does the tool imply about why things are as they are, particularly in terms of different outcomes for people of different identities?

- Does the tool ask you to consider the ways racial inequities are maintained?

- Does the tool help you choose strategies that consider systemic, institutional, intergroup, and individual levels of privilege and racism, and how they act to interrupt or reinforce each other?

4. What are our leadership and capacity-building needs when implementing a tool or using a framework?

In the change process, best practice calls for establishing an equity leadership team.[13] This team is typically cross-functional and diverse by identities and informal/formal leadership, and guides the change process along with the senior leadership team. The two teams work closely together and have different roles, though each are messengers, ensure time is allocated and the work continues to be prioritized, model equitable practices, and support staff throughout the change process.

Taking time to invest in building the capacity of these two teams, as well as working to build relationships and create accountability practices, is key to developing a strong foundation for the overall change process. These teams can take a lead in identifying and introducing a tool or framework.

In a mission-driven organization that works toward racial justice outcomes, centering relationships as a core value is typically not tracked as part of the progress toward racial justice for either the funder or grantee deliverables. However, building and prioritizing authentic and respectful relationships with a racial justice lens means setting up inclusive processes for getting work done, centering people of color's leadership, normalizing conversations about racism, and developing

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12   *What Are Some Tips for Reviewing Resources With a Racial Equity Lens?*, Center for Assessment and Policy Development and MP Associates. www.racialequitytools.org

13   Here are two resources that discuss more the equity leadership team's role: *Racial Equity Core Teams: The Engine of Institutional Change*, Government Alliance on Race & Equity, and *Driving Toward Equity—Building a Racial Equity Team*, Urban Sustainability Directors Network,

feedback and conflict muscles. This is all part of racial justice work—not an addition to it. Building organizational capacity means supporting each individual staff person's learning agenda as well as that of the group as a whole. Some foundations provide professional development dollars for individual staff to participate in workshops, others provide racial equity workshops or learning series for the full staff, and still others offer a combination of these approaches. To move the work internally, we recommend that staff and board be introduced to the same framework. This will help later on when reviewing the assessment data and developing a road map for advancing racial justice.

In planning for training, provide sufficient time for the facilitators to obtain baseline information about the participants and organizational issues, and ensure post-workshop steps are planned. Dissonance and workplace disruption typically follow any training process—some of it due to the time needed for people to understand the concepts or to take in the stories shared about the impact of inequities that may not have been known. People could also be unsure about individual and organizational responsibility as well as the risks in working toward institutionalizing racial justice.

The Role of Assessments

Groups often use a racial justice organizational assessment tool early on to engage stakeholders on how the foundation is working (or not) to advance racial justice. The assessment process can involve just staff, or it can also include partner organizations, grantees, and peer funders.

The following are some areas an organization may want to examine:[14]

- How explicitly the foundation uses terms of race, racism, power, privilege, and racial inequities in organizational documents, conversations, and internal and external communication.

- Experiences, perspectives, and knowledge about race, racism, power, and white privilege provide baseline data on staff and board knowledge and skills, which can help inform the education sessions and be a benchmark for the organization.

- How policies, practices, and culture are aligning with the value of racial justice, specifically looking at manifestations of white dominant culture in organizational policies and practices.

- Any recent harm and the impact on staff and board.

- Opportunities to leverage in developing the next steps in the racial justice change process.

- Ideas on how to institutionalize racial justice.

The data collected can help foundations see and understand different points of view and the impact of policies, practices, and culture on different stakeholders and members of identity groups. It is helpful for the racial equity leadership team and senior foundation leaders to review the data in advance, make meaning of them, and design the best process to engage the staff and trustees.

After discussing outcomes of a racial equity assessment, collectively the staff and trustees can create a road map—prioritizing what needs to be addressed and determining what other tools to use, strategies, roles, and a timeline. It is critical for there to be a process in place to act on what is learned. If you are asking people to share their truths and the impact of racial inequities within the organization, then the organization is accountable for stepping up and working to address them— and, more importantly, working collectively for a common vision of a racially just organization.

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14   *Transforming Organizational Culture Assessment Tool,* Maggie Potapchuk, MP Associates.

The Way Forward

Philanthropy is again in a significant moment of critique and self-reflection.

Scholars, journalists, and activists, as well as foundation leaders, have called for a (clear-eyed) reckoning with the role foundations play not just in solving or aggravating social problems, but in the very shape of democracy itself.[15] The threats to democracy, human rights, and the planet appear to be of historic proportions. The pessimists among us can easily argue that the worst is yet to come.

It is the way of timely debates to lose their currency after a year or so. We urge the field to sustain the scrutiny, self-evaluation, and transformation that this moment demands from all of us. The visions and strategies of racial justice constituencies challenge philanthropic structures as they do all others. This includes attention to the ethics that determine how the money is made in the first place, not just how it is distributed through donor largesse. If these visions and strategies are successfully enacted, foundations, too, will be affected, primarily by the redirection of currently privatized resources into public institutions.

Foundations should expect, and respond positively to, calls for greater transparency, greater connection to the field, greater diversity, greater democracy, and less abuse of power. Grantmaking with a racial justice lens implicates all of these ideas and more.

Inspiration yet abounds. All over the country, people are activating themselves and each other to fight for and put into practice a truly inclusive vision of peace, dignity, and freedom for all. Racial justice leaders have created openings in virtually every arena of life in the United States, and they maintain a stalwart presence even with very few resources. The spirit of the racial justice movement is strong. Together, we can ensure that the movement's body is equally healthy, and that both will remain so for the unprecedented challenges ahead.

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15   A broad range of critiques that are too numerous to cite in full include: *Winners Take All: The Elite Charade of Changing the World*, Amand Giridharadas, 2018, Knopf; *Is Philanthropy Bad for Democracy?* Gara LaMarche, The Atlantic, October 30, 2014, ; *Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance*, Edgar Villanueva, 2018, Berrett-Koehler Publishers; *White People in Philanthropy—This Is Our Move*, Pamela Shifman, Chronicle of Philanthropy, February 22, 2018; *How Foundations Can Grapple With the Reality That Their Wealth Was Accumulated Unjustly*, Lori Bezahler and Lateefah Simon, Chronicle of Philanthropy, November 7, 2019; *The Revolution Will Not Be Funded*: *Beyond the Non-Profit Industrial Complex*, Incite! 2017, Duke University Press Books; *America is Burning*, Vanessa Daniel, Groundswell Fund.; *The Price of Civil Rights: Black Lives, White Funding and Movement Capture*, Megan Ming Francis.; *From Generosity to Justice: A New Gospel of Wealth*, Darren Walker, 2019, Disruption Books.

Appendix: Tools and Resources for Aligning Your Foundation with Racial Justice

By Maggie Potapchuk[16]

Criteria for Tools Inclusion

We have included tools that are particularly relevant for moving from racial equity to racial justice, and especially if they were created directly for the philanthropic sector. Practitioners have also created a robust body of reports and tools around racial equity and justice, as well as around philanthropy, over the last decade. Rather than try to cite all of the tools, we point to a comprehensive clearinghouse that is continually updated, such as www.racialequitytools.org, and also to www.changephilanthropy.org.

Align Foundation Practices with a Racial Justice Vision

Below are racial equity assessment tools and questions that can be modified to create surveys and focus groups and/or interview questions, followed by tools on other aspects of aligning your foundation.

- *Philanthropy Self-Assessment for Working with Tribal Communities,* Native Americans in Philanthropy.

- *Before You Begin: What Is the Role of Privilege and Risk in Exercising Foundation Power?,* In L. Ranghelli, J. Choi, & D. Petegorsky, *Power Moves: Your Essential Philanthropy Assessment Guide for Equity and Justice* (pp. 10-14).National Committee for Responsive Philanthropy.

- *Building Power: Self-Assessment Data Gathering Tools,* In L. Ranghelli, J. Choi & D. Petegorsky, Power Moves: Your Essential Guide for Equity and Justice (pp. 19-28). National Committee for Responsive Philanthropy.

- *Catalytic Change: Lessons Learned from the Racial Justice Grantmaking Assessment,* Philanthropic Initiative for Racial Equity and Applied Research Center (now Race Forward).

- *Operationalizing a Structural Racism Framework: A Guide for Community Level Research and Action*, Stacey A Sutton, Aspen Roundtable Structural Racism and Revitalization Project.

- *Race Matters: Organizational Self-Assessment,* Annie E. Casey Foundation.

- *Race Matters, Racial Equity Impact Analysis, Assessing Policies, Programs and Practices,* Annie E. Casey Foundation.

- *Questions for Grantmakers: Understanding How Structural Racism Affects Grantees,* Funders for LGBTQ Issues.

- *Standing Together: Coming Out for Racial Justice - An Anti-Racist Organizational Development Toolkit for LGBT Equality Groups and Activists,* Basic Rights Education Fund, pp. 147-163

- *Unite for Equity Assessment,* Change Philanthropy.

- *Transforming Organizational Culture Assessment Tool,* Maggie Potapchuk, MP Associates.

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16   The collections of tools and resources were primarily written, as well as collected, annotated, and, in some cases, developed, by Maggie Potapchuk of MP Associates. Over the past decade, she has partnered on several projects with Gita Gulati-Partee of Open Source Leadership Strategies on supporting organizations in the philanthropic sector to operationalize racial equity. Some of the points made and lessons learned reflect their collective work.

OPERATIONALIZE RACIAL JUSTICE

The following list includes examples of how foundations have operationalized racial justice, along with tools, frameworks, and resources focused on operationalizing racial justice and racial equity.

For the sake of narrowing focus, we are primarily only including those resources that are designed specifically for grantmaking institutions, though of course there are a plethora of valuable tools created for nonprofits, schools, government and other sectors that are helpful to review. Toward this end,, a clearinghouse for searching research, tips, and curricula can be found at **www.racialequitytools.org**; it includes more than 2,500 curated resources.[17]

CASE STUDIES

- *Catalytic Change: Lessons Learned from the Racial Justice Grantmaking Assessment,* Philanthropic Initiative for Racial Equity and Applied Research Center (now Race Forward).

- *Grantmaking with a Racial Equity Lens,* Philanthropic Initiative for Racial Equity and GrantCraft.

- *Operationalizing Equity: Putting the Annie E. Casey Foundation's Racial and Ethnic Equity and Inclusion Framework into Action,* Annie E. Casey Foundation.

- *Paths Along the Way to Racial Justice: Four Foundation Case Studies* Lisa McGill and Maggie Potapchuk, *Philanthropic Initiative for Racial Equity Critical Issues Forum*, June 2014, Vol. 5.

- *Paying Attention to White Culture and Privilege: A Missing Link to Advancing Racial Equity*, Gita Gulati-Partee and Maggie Potapchuk, The Foundation Review, 2014, Vol. 6, Iss. 1, pp. 25-38.

TOOLKITS

- *The Choir Book: A Framework for Social Justice Philanthropy,* Justice Funders.

- *The Diversity, Equity, and Inclusion Toolkit for Consultants to Grantmakers,* National Network of Consultants to Grantmakers.

- *Equity Footprint*, Frontline Solutions.

- *Resonance: A Framework For Philanthropic Transformation,* Justice Funders.

- *Power Moves,* National Committee for Responsive Philanthropy.

- *Responsive Philanthropy in Black Communities: A Framework and Agenda for Change.* Association for Black Foundation Executives.

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17   *Racial Equity Tools* is developed and maintained by Maggie Potapchuk, MP Associates, Sally and Stephanie Leiderman, Center for Assessment and Policy Development; and Shakti Butler, World Trust Educational Services, and can be found at www.racialequitytools.org.

DEVELOP EXPLICIT, SHARED, AND TESTED LANGUAGE

The following list includes curricula, lesson plans, and videos that can be used in the early and ongoing stages of developing and aligning around explicit, shared, and tested language. There are many consulting firms and organizations that can be engaged to provide this education to staff and trustees.

In choosing a curriculum and/or consultant, ask two questions:

1. Is the curriculum based on structural analysis and does it discuss power?
2. Does the process center the voices and leadership of people of color?

CURRICULA

- *The 1619 Project Curriculum*, Pulitzer Center.

- *Racial Equity Learning Curriculum*, World Trust Educational Services.

- *Transforming White Privilege: A 21st Century Leadership Capacity Curriculum*, Shakti Butler – World Trust Educational Services, Sally Leiderman - Center for Assessment and Policy Development, and Maggie Potapchuk - MP Associates.

- *Asian American Racial Justice Toolkit*, Lucia Lin and Timmy Lu.

- *Dismantling Anti-Black Bias in Democratic Workplaces: A Toolkit*, AORTA.

- *Standing Together Coming Out for Racial Justice: An Anti-Racist Organizational Development Toolkit for LGBT Equality Groups and Activists*, Basic Rights Education Fund. pp. 12-57.

- *Teaching a People's History,* Zinn Education Project.

- *Facilitator's Guide for Continuous Improvement Conversations with a Racial Equity Lens*, Living Cities.

- *Group Norms for Breakthrough Social Change,* OpenSource Leadership Strategies.

- *Race Matters PowerPoint Presentation*, Annie E. Casey Foundation.

- *Systems Thinking and Race Workshop Summary*, Connie Campang Heller and john a. powell.

VIDEOS

- *The Disturbing History of the Suburbs,* Adam Ruins Everything.

- *Cracking the Codes: The System of Racial Inequity,* World Trust Educational Services.

- *Race: The Power of an Illusion,* PBS.

- *What is Systemic Racism,* Race Forward.

SET YOUR GOALS AND FOLLOW THROUGH

- *__Moving the Race Conversation Forward,__* Race Forward.

- *__Standing Together Coming Out for Racial Justice: An Anti-Racist Organizational Development Toolkit for LGBT Equality Groups and Activists,__* Basic Rights Education Fund, pp.172-180.

- *__Talking About Race Toolkit,__* The Center for Social Inclusion.

- *__Telling a New Story,__* Opportunity Agenda.

- *__Ten Lessons for Talking About Race, Racism and Racial Justice,__* Opportunity Agenda.

COMMUNICATIONS AND MESSAGING

- *__Talking About Race Toolkit,__* Center for Social Inclusion.

- *__Telling a New Story: A Collaborative Checklist for Social Justice Leaders Using Narrative Strategies for Change,__* Opportunity Agenda.

- *__Ten Lessons for Talking About Race, Racism and Racial Justice,__* Opportunity Agenda.

- *__We ARE (Advancing Racial Equity),__* Consumer Health Foundation.

ADDRESS RESISTANCE

The following resources support operationalizing racial justice by building skills for addressing conflict and talking about racism:

- *__7 Agreements for Productive Conversations During Difficult Times,__* Vu Le, Nonprofit AF

- *__Conflict: A Force for Breakthrough Social Change,__* Open Source Leadership Strategies

- *__Race Matters: How to Talk About Race,__* Annie E. Casey Foundation

- *__Re-Railing the Conversation on Race,__* Autumn Brown, AORTA; and Danielle Sered.

DON'T RUN AWAY FROM CONFLICT

The following resources support operationalizing racial justice by building skills for addressing conflict and talking about racism:

- *__Ten Lessons for Taking Leadership on Racial Equity,__* The Aspen Institute.

- *__The Five Core Practices of Effective Leadership for Social Justice,__* Social Justice Leadership.

- *__Are You Guilty of Equity Offset?__* NonprofitAF.

- *__Guiding Principles and Values: Resonance Framework,__* Justice Funders.

Invest in Racial Justice

PRIORITIZE BUILDING POWER

- *As the South Grows: Strong Roots,* Ryan Schlegel and Stephanie Peng, National Committee for Responsive Philanthropy and Grantmakers for Southern Progress.

- *Building Power, Power Moves,* National Committee for Responsive Philanthropy.

- *The Case for Funding Black-Led Social Change,* Susan Taylor Batten, ABFE and Nat Chioke Williams, Hill Snowden Foundation.

- *Changing the Conversation: Philanthropic Funding and Community Organizing in Detroit,* Allied Media Project, Detroit People's Platform, and Building Movement.

- *From the Roots: Building the Power of Communities of Color to Challenge Structural Racism,* Akonadi Foundation.

- *Mobilizing Community Power to Address Structural Racism,* Philanthropic Initiative for Racial Equity Critical Issues Forum, 2012, Vol. 4.

REDEFINE IMPACT

- *Advancing the Mission: Tools for Equity, Diversity, and Inclusion,* Annie E. Casey Foundation.

- *Advancing Racial Equity and Transforming Government,* Government Alliance on Race and Equity.

- *Measuring Love in the Journey for Justice: A Brown Paper,* Shiree Teng and Sammy Nuñez.

- *Questions for Grantmakers: Understanding How Structural Racism Affects Grantees,* Funders for LGBTQ Issues.

- *Racial Impact Assessment Toolkit,* Race Forward.

- *Tools for Thought: Using Racial Equity Impact Assessments for Effective Policymaking,* Annie E. Casey Foundation.

- *Tipsheets,* (viz., Aligning Evaluation With Your Work; Collecting Information, Using and Sharing Evaluation Results), Racial Equity Tools, Center for Assessment and Policy Development, MP Associates, World Trust Educational Services.

- *Marking Progress: Movement Toward Racial Justice,* Philanthropic Initiative for Racial Equity Critical Issues Forum, July 2010, Vol. 3.

THE PHILANTHROPIC INFRASTRUCTURE'S ROLES AND COST

- *Authentic & Equitable Partnerships: A Framework for Building Movements,* Gita Gulati-Partee, OpenSource Leadership Strategies, and Maggie Potapchuk, MP Associates, for Funders for Reproductive Equity.

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

- *Wielding Power, Power Moves,* National Committee for Responsive Philanthropy.

- *Funding Movement Building: Bay Area Approaches,* Bay Area Justice Funders Network.

- *Walking Forward: Racial Justice Funding Lessons from the Field,* Julie Quiroz, *Philanthropic Initiative for Racial Equity Critical Issues Forum,* June 2014, Vol. 5.

SUPPORT MOVEMENT ECOSYSTEMS

- *14 Characteristics of an Intersectional Mass Movement,* Drew Serres, Organizing Change.

- *BOLD Report 2017,* N'Tanya Lee, Prudence Browne, and Zuri Murphy, BOLD.

- *Crisis Pimping or Preparedness Investing in Social Movement Encapsulation,* Allen Frimpong, Movement Netlab.

- *Ecosystem Grantmaking: A Systemic Approach to Supporting Movements,* Akonadi Foundation.

- *Movement-Building Practice: Margins to Center,* Transformative Movement Building Webinar Series, Move to End Violence

- *Making Change: How Social Movements Work and How to Support Them,* Manuel Pastor and Rhonda Ortiz, March 2009, Program for Environmental and Regional Equity, University of Southern California.

- *Movement Cycles in the Struggle for Black Lives,* Allen Frimpong, Movement NetLab.

- *Journey Towards Intersectional Grant-Making,* Mari Ryono, Funders for a Just Economy.

BE ACCOUNTABLE TO THE RACIAL JUSTICE FIELD

- *Gender Oppression, Abuse, Violence: Community Accountability Within the People of Color Progressive Movement,* INCITE! Women of Color Against Violence.

- *European Dissent Accountability Statement,* People's Institute for Survival and Beyond.

- *Organizational Change and Accountability,* Paul Kivel.

- *Protocol and Principles for White People Working to Support the Black Liberation Movement,* Bay Area Solidarity Team.

Acknowledgements

Grantmaking With a Racial Justice Lens was developed by the **Philanthropic Initiative for Racial Equity (PRE)** and draws on interviews with racial justice practitioners, grantmakers, consultants, and foundation executives working in all parts of the U.S. in many fields and in a wide range of international, national, community, and family foundations. PRE also convened focus groups of racial justice practitioners, grantmakers, and other infrastructure organizations in the field of philanthropy to gather stories and ideas for making this document as useful as possible.

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18   Over the past decade, Maggie has partnered on several projects with Gita Gulati-Partee of Open Source Leadership Strategies on supporting organizations in the philanthropic sector to operationalize racial equity. Some of the points made and lessons learned reflect their collective work.

19   Please note: Throughout these acknowledgements, we included the name of the organization with which interviewees were affiliated when they gave input. Those interviewees whose names are marked with an asterisk have since moved to a new organization.

Since its launch in 2003, the goal of the Philanthropic Initiative for Racial Equity (PRE) has been to increase the amount and effectiveness of resources aimed at combating institutional and structural racism in communities through capacity building, education, and convening of grantmakers and grantseekers. It is led by an intersectionally diverse board of racial justice activists, researchers, and practitioners.

Are you ready to move beyond racial equity to a racial justice lens?

racialequity.org

🐦 RJGrantmakers

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PRE is a project of Tides Center

Sen, Rinku, and Villarosa, Lori. *Grantmaking With a Racial Justice Lens: A Practical Guide*. Philanthropic Initiative for Racial Equity. 2019.

Potapchuk, Maggie. *Critical Questions to Ask When Selecting Tools and Resources for Aligning Your Foundation with Racial Justice, Grantmaking With a Racial Justice Lens: A Practical Guide*, Rinku Sen and Lori Villarosa, Philanthropic Initiative for Racial Equity, 2019, [pgs 39-41]

Potapchuk, Maggie. *Tools and Resources for Aligning Your Foundation With Racial Justice. Grantmaking With a Racial Justice Lens: A Practical Guide*, Rinku Sen and Lori Villarosa, Philanthropic Initiative for Racial Equity, 2019, [pgs 43-48]