



THE KRESGE FOUNDATION

# Talent Funder Convening

Leadership and  
Infrastructure  
Funding Team

## What Foundations are Learning About Supporting Nonprofit Leaders' DEI Capacity



Community  
Wealth Partners

by SHARE OUR STRENGTH

*This report was developed by Community Wealth Partners.*

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## Executive Summary

In December 2019, 21 funders met to share what's working well in their efforts to support nonprofit leaders' diversity, equity, and inclusion (DEI) capacity, as well as what's not working.

This report summarizes takeaways from the convening. It includes recommendations and examples from a variety of approaches funders are using as well as challenges and ongoing questions the field is grappling with. Recognizing that funders must also do internal work in order to lead on equity with authenticity, this report also includes some discussion of practices, conversations, and considerations happening within foundations.

Interviews with participants showed that foundations were using some common approaches to supporting leadership among grantees:

- **Supporting technical assistance for grantees to operationalize DEI** (e.g., individual grants for staff training, organizational equity assessment, etc.)
- **Field-building supports** (e.g., grants to help strengthen fieldwide practice to support nonprofit leadership and racial equity through convening and/or capacity building for consultants and service providers)
- **Fellowship programs and learning cohorts** (e.g., building capacity of individuals or a group of leaders to advocate for systems change)
- **Capacity-building programs** (e.g., offering curated capacity-building services to groups of grantees with similar needs)

While funders explored what's working and what's not in a variety of approaches to supporting talent and leadership through a racial equity lens, six common recommendations emerged.

### *In Work with Grantees*

- **Right-size outcome expectations to be commensurate with the amount and duration of support provided.** Advancing equity inside organizations is complex, ongoing work. Set reasonable expectations for what an organization might accomplish in a grant cycle, and help grantees set reasonable expectations for themselves.
- **Create space for sharing and learning about what's working and what's not.** Funders can use their convening power to facilitate learning among grantees, service providers, and other funders to help deepen understanding of promising practices and helpful tools.
- **Trust that grantees know best what support they need and what difference it is making.** As with any capacity-building support, grantees should have a voice in deciding what they need, what changes they hope to see as a result, and how they will know if the work is having the desired effect.

- **Share openly and honestly with grantees about your internal equity work.** This is critical for building trust and credibility with grantees. Funders should show humility and vulnerability if they expect the same of their grantees.

### *In Internal Work*

- **Continue making the case for greater investment in building DEI capacity.** Some described current levels of investment in grantees' DEI capacity as "a drop in the bucket," so more case-making could yield greater investments. Funders encouraged more case-making from white allies as well as a stronger voice from foundation leadership. They cautioned against preaching to the choir about the importance of this support and recommended reaching out to those who are not yet bought in to the importance of investing in DEI capacity.
- **Consider who is receiving support and who is not.** Is the foundation working to advance equity among current grantees, regardless of who they are? Does the foundation want to correct for historical inequities by giving resources to those who have previously not had a seat at the table? Or are both approaches required to achieve the foundation's goals?

## Introduction

For The Kresge Foundation, supporting nonprofit leaders' racial equity capacity is a key way in which the foundation works to expand opportunities in America's cities. The foundation recognizes that nonprofits must have strong leadership that is equipped to advance racial equity in order to achieve meaningful outcomes in their organizations and communities.

In December 2019, 21 funders met to share what's working well in their efforts to support nonprofit leaders' diversity, equity, and inclusion (DEI) capacity, as well as what's not working. The goals of the meeting were as follows:

1. Gain greater awareness of how funders are helping build grantee capacity around talent and leadership development and racial equity.
2. Foster candid conversations about what's working and what's not in the design, management, and evaluation of these programs.
3. Build strong connections among funders taking similar approaches to this work.
4. Leave with practical takeaways about promising practices emerging from talent and leadership development and racial equity capacity-building investments.

Community Wealth Partners, a social sector consulting firm, facilitated the convening and developed this report. (For a list of foundations represented at the convening, see page 19.)

This report summarizes takeaways from the convening. It includes recommendations and examples from a variety of approaches funders are using as well as challenges and ongoing questions the field is grappling with. Recognizing that funders must also do internal work in order to lead on equity with authenticity, this report also includes some discussion of practices, conversations, and considerations happening within foundations.

The perspectives included in this report are from a small group representing 16 foundations, each taking a different approach to investing in nonprofit leaders' DEI capacity. Participants surfaced a set of common considerations, challenges, and questions that are likely to resonate with other foundations as well. The funders represented in this report expressed a desire for more sharing of what works — and what doesn't — to help spur greater action across philanthropy, and the hope is that other funders may find value in the takeaways from this discussion.

### *Defining Terms*

While many funders — particularly those who work primarily in the U.S. — have an explicit focus on racial equity, for some funders — primarily those who fund internationally — the context they are working in places emphasis on different dimensions of equity, such as gender, ethnicity, ability, or sexual orientation. In this report, we will use "DEI" to cover the range of ways funders are working to advance equity. (See key definitions below for more context.)

## *Key Definitions for This Report*

*Capacity Building:* *Capacity* is an abstract term that describes a wide range of capabilities, skills, practices, knowledge, and resources that individuals and organizations need in order to achieve results. *Capacity building* describes investments in individuals and/or organizations to develop and grow specific capacities.

*Talent and Leadership Development (TLD)* is a specific type of capacity building that leverages investments in individuals and/or teams to develop a wide range of capacities in order to build stronger, more well-run, and more sustainable organizations and communities. Examples of capacities built through TLD include:

- Recruitment and hiring
- Management best practices
- Adaptive leadership for systems change
- Collaboration among and across funders, grantees, service providers/trainers, and other key partners

*Diversity* is the demographic mix of a specific collection of people considering elements of individual difference with attention to people who have historically been underrepresented, including racial and ethnic groups, LGBTQ populations, women, and people with disabilities.

*Inclusion* refers to the degree to which diverse individuals can fully participate in the decision-making processes of an organization or group. While an inclusive group is necessarily diverse, a diverse group may not be inclusive.

*Racial Equity is both an **outcome** and a **process**.*

**As an outcome**, it is when race no longer determines socioeconomic outcomes and everyone has what they need to thrive.

**As a process**, we practice racial equity when those most impacted by structural racial inequity are meaningfully involved in the creation and implementation of the policies and practices that impact their lives.

**When we achieve racial equity:**

- People, including people of color, are owners, planners, and decision-makers in the systems that govern their lives.
- We acknowledge and account for past and current inequities, and provide all people, particularly those most impacted by racial inequities, the infrastructure needed to thrive.
- Everyone benefits from a more just, equitable society.

*Diversity and inclusion definitions adapted from D5 Coalition: <https://www.d5coalition.org/about/dei/>.*

*Racial equity definition adapted from the Center for Social Inclusion: <https://www.centerforsocialinclusion.org/our-work/what-is-racial-equity/>*

## Reflections on Common Approaches to Supporting Leadership

Interviews with participating foundations showed that foundations were using some common approaches to supporting leadership among grantees:

- **Supporting technical assistance for grantees to operationalize DEI** (e.g., individual grants for staff training, organizational equity assessment, etc.)
- **Field-building supports** (e.g., grants to help strengthen fieldwide practice to support nonprofit leadership and racial equity through convening and/or capacity building for consultants and service providers)
- **Fellowship programs and learning cohorts** (e.g., building capacity of individuals or a group of leaders to advocate for systems change)
- **Capacity-building programs** (e.g., offering curated capacity-building services to groups of grantees with similar needs)

Most funders were using at least two of these approaches. Fellowship programs were the most offered approach, and only a few of the funders curate capacity-building programs for grantees. Funders shared what's working well in each approach as well as challenges and questions they're grappling with.

### *Supporting Technical Assistance for Grantees to Operationalize DEI*

(e.g., individual grants for staff training, organizational equity assessment, etc.)

#### *Example: The William and Flora Hewlett Foundation's OE-DEI Grants*

The Hewlett Foundation's DEI-focused capacity-building grantmaking is housed within its organizational effectiveness (OE) portfolio. Hewlett launched its dedicated OE-DEI fund in 2018, specifically for capacity-building projects to advance grantees' work on diversity, equity, and inclusion. OE-DEI funds are allocated to each of the foundation's program areas to decide how to deploy them. OE-DEI grants have supported a wide range of projects, including staff training,

work to define the organization's approach for future DEI work, and organizational equity assessments. Hewlett recently completed an [assessment of early lessons learned from the OE-DEI fund](#), which will inform its grantmaking going forward.

#### *Six-Word Story\**

#### **Multiple intersecting journeys of courage and hope**

*\*Participants were asked to describe the essence of their work to support leadership and/or equity in six words or less. A few "six-word stories" are shared throughout this report.*

### *Considerations for Providing Technical Assistance Support*

While foundations are providing technical assistance in different ways, funders identified some common factors to consider.

- When providing technical assistance for nonprofits to advance DEI in their organizations, it is important to **ensure buy-in and commitment from grantee leadership**. "When we are practicing equity, it can surface a lot for nonprofits that may not be quite ready for

challenges to the current structures and decision-making processes in place,” one funder said. “Leaders may be unprepared for some of the churning happening at the staff level, and this investment may ignite something that is disruptive to the organization.” For example, an equity audit — a common first step for many organizations — may uncover areas that need attention. Leadership must be ready and willing to receive and address the information uncovered.

- **There are many ways nonprofits can approach their internal equity work**, and this can make it challenging for funders to know what type of guidance and support to offer. Many foundations offer flexibility in how grantees use the resources, trusting they know best what they need. At the same time, funders acknowledged that organizations entering this space don’t know what they don’t know, and funders can offer helpful guidance by sharing what they’re learning and pointing grantees to vetted resources.
- **Operationalizing DEI in organizations is complex, ongoing work.** Funders should resource the work in a way that is commensurate with the time and commitment it will require from the organization. Most funders acknowledged the grants they provide for technical assistance are relatively small compared to programmatic funding, and the majority offer one-year grants, some with the option to renew. In these instances, funders can help grantees set more reasonable expectations about how much can be accomplished. For example, in their assessment of their OE-DEI grantmaking, the Hewlett Foundation found most grantees were overly ambitious when stating objectives and activities in the grant proposals, which were on average about \$50,000 over one year. The foundation plans to use findings from the assessment to help grantees right-size their goals in future grantmaking.

### *Field-Building Supports*

(e.g., grants to help strengthen fieldwide practice to support nonprofit leadership and racial equity through convening and/or capacity building for consultants and service providers)

#### *Example: Borealis Philanthropy’s Field-Building Efforts*

As a philanthropic intermediary, Borealis Philanthropy helps connect grantmakers to organizations that meet their mission. Through the [Racial Equity to Accelerate Change \(REACH\) Fund](#), Borealis seeks to build the nonprofit sector’s capacity to address issues of racial and intersectional equity and inclusion and to address the gap between interest and capacity in the sector to pursue racial equity. The fund invests in supporting and lifting up the work of innovative racial equity practitioners and matching nonprofits with them for technical support. Borealis also manages two other racial equity-focused funds, the [Racial Equity in Philanthropy \(REP\) Fund](#), which promotes grantmaking strategies that prioritize structural change and end racial disparities, and the [Racial Equity in Journalism Fund](#), which works to strengthen the capacity and sustainability of news organizations led by people of color and increase civic engagement for communities of color.



## Considerations for Supporting Field Building

Advancing equity within nonprofits requires a strong ecosystem of service providers who can meet organizations where they are and provide a range of offerings to help build their capacity. Funders can play an important role in building the field of DEI service providers and ensuring they are well equipped to collectively contribute to strengthening the sector. Funders discussed two approaches to doing this.

One approach funders have found helpful is using their convening power to **create space for service providers to learn from one another and explore opportunities for coordination and collaboration**. When The Kresge Foundation did this as part of its Fostering Urban Equitable Leadership (FUEL) program, service providers found value in sharing practices that influenced their delivery, identifying opportunities to differentiate or expand their work, creating new relationships that led to collaborations in some instances, and finding opportunities for their own learning and professional development. (See page 9 for a description of Kresge’s FUEL program.)

When convening service providers, navigating the power dynamics that are inherent with a funder’s role can be tricky. Some funders have opted to create the space but not be in the room. Others have decided to join the gathering but play a supporting, not lead, role; to name the power dynamics that are present; and to be explicit about how they see their role as funder and how they intend to support the group.

### Six-Word Story

Understanding white privilege, acting anti-racist

Funders also recommended finding ways to ensure convening time is supportive and not a burden for service providers. For example, consider holding a convening connected to a conference that people are already attending.

A second way funders can help build the field is by **providing capacity-building grants to service providers to help them advance equity inside their organizations**. Because their client base (nonprofits) is a price-sensitive market, many providers operate on thin margins and have limited resources to invest in their own capacity. Funders can contribute to their capacity by offering funding or learning opportunities. For example, the Barr Foundation is partnering with The Boston Foundation to support TSNE Mission Works and the Institute for Nonprofit Practice to create a DEI curriculum for organizational development practitioners. This will provide service providers with knowledge and training and will also help nonprofits when trying to discern among different providers.

Funders acknowledged they could do better in paying attention to who is receiving field-building support and who may not be at the table. While many funders are providing support to help service providers who are at the earlier stages of centering equity in their work and/or have white people in the executive role, it is important not to overlook service providers who have been leading on DEI for a long time and invest in their continued growth and development as well.

## *Fellowship Programs and Learning Cohorts*

(e.g., building capacity of leaders to advocate for systems change)

### *Example: W.K. Kellogg Foundation's Community Leadership Network*

One of W.K. Kellogg Foundation's core leadership programs is the [WKKF Community Leadership Network](#) with the Center for Creative Leadership. This 18-month fellowship program supports 80 local leaders in personal leadership development, deepening their capacity for community

engagement, advancing racial equity, and fostering collaborative action for systems change.

#### *Six-Word Story*

**Acknowledging others' experiences, begin breaking, reimagining**

The fellowship brings together dynamic and diverse leaders from across the United States and sovereign tribes. The fellowship is organized into cohorts based in Michigan, Mississippi, New Mexico and New Orleans — the foundation's priority U.S. places — as well as one U.S. national cohort. In addition, fellows become part of a vast network of more than 1,700 alumni can who provide ongoing support to affect systemic change.

### *Considerations for Fellowship Programs and Learning Cohorts*

Fellowship programs and learning cohorts can help achieve a range of objectives. Some foundations, including the W.K. Kellogg Foundation, are designing programs focused on supporting leaders' learning and practice related to equity. Other fellowships — such as Sterling Network NYC, sponsored by the Robert Sterling Clark Foundation — were created to bring together a diverse group of leaders from across the community to spark collaboration and innovation to address specific challenges or issues. And some foundations, including the Charles and Lynn Schusterman Family Foundation, have created fellowships to help build more diverse leadership pipelines. Even though the objectives for fellowships and learning cohorts may differ, funders agreed on some important considerations for designing and facilitating these programs.

- It is important to **have clarity on where the foundation hopes to have influence through this program**. Is the goal to influence individual leadership, to strengthen organizations, to spark systems change, or to have an impact at multiple levels?
- Convening diverse groups is critical, and that often requires foundations to reach beyond their immediate network to help **ensure the opportunity is widely publicized and accessible**. Some funders said this is an ongoing challenge, but they shared some approaches they are using to try to extend their reach. For example, several funders rely on advisory committees or alumni networks to nominate potential participants or help spread the word. Funders acknowledged that cultivating a diverse applicant pool requires time and resources — this phase could take six to eight months.

- **Find ways to meet people where they are while at the same time getting to a common understanding and vision for the work.** Convening a diverse group will likely mean that participants are coming from different levels of understanding and applying the content being offered. This may be especially true when equity is part of the curriculum. The design and facilitation should allow for people to enter the cohort from different places of knowledge and experience and leave with shared understanding and a common vision for moving forward.
- Fellowship programs often require deep personal work, and it is important to **assess readiness to ensure participants are prepared** for the work at hand. Assessing readiness among applicants is a common challenge for many fellowship programs. The S. D. Bechtel Jr. Foundation found this to be the case when selecting participants for its DEI learning cohorts and developed a proposal scoring rubric to help assess readiness. The rubric includes factors such as indication that applicants expect their personal participation in the fellowship to lead to organizational change and evidence of prior work to change internal systems or processes to advance DEI.
- **Create safety in the group so participants will feel comfortable sharing openly.** It is especially important to consider the safety of participants of color. Things that can help create safety include ensuring no one is “the only one” in the group (i.e., pay attention to representation across different dimensions of diversity) and creating space for participants to support one another through peer coaching or other means.

### *Capacity-Building Programs*

(e.g., offering curated capacity-building services to groups of grantees with similar needs)

#### *Example: The Kresge Foundation’s FUEL Program*

The Kresge Foundation’s leadership and infrastructure funding team (LIFT) provides support for the field of equity-focused nonprofit talent and leadership development with a \$2 million budget. LIFT’s core capacity-building program, [Fostering Urban Equitable Leadership \(FUEL\)](#), gives approximately 150 nominated Kresge grantees the opportunity to access talent and leadership development programs and resources from nonprofit providers like CompassPoint, Achieve Mission, and Change Elemental. The programs focus on a range of areas including race equity and succession planning, managing for more equitable outcomes, and embedding equity into organizational processes and structures.

#### *Considerations for Capacity-Building Programs*

Because grantees tend to have some common capacity needs, some funders have found success with approaches that offer curated services to groups of grantees. In these approaches, **giving grantees voice in shaping the offerings** ensures the services meet their needs.

Funders also are **reflecting on who has access to these types of programs and ways they might be more inclusive**. Some acknowledged that long-standing grantees access these services more often because they have strong relationships with program officers, and they know to ask for this type of support. Funders who are pushing themselves to be more inclusive and cast a wider net in offering these services recognized that leaders of color may feel less comfortable raising their capacity needs than white leaders because there may not be the same depth of relationship and trust with the foundation.

Finally, funders named the unintended signals they could be sending when inviting grantees to participate in capacity-building programs. Grantees may hesitate to decline an invitation from a funder if they are not clear what the implications of saying no could be. If the program is optional, make sure that is clear. When communicating this offering to grantees, **position the opportunity as an investment to strengthen and amplify the good work the organization is already doing**, not a correction for a flaw or weakness.

## Assessing the Impact

In conversations with participants before the convening, one question consistently rose to the top: ***How do we assess the impact of our support for nonprofit leaders' DEI capacity?***

Supporting nonprofit leaders' DEI capacity requires a **long-term commitment and flexibility**. Grantmakers working to advance equity in organizations and communities look to long-term outcomes as well as short-term outcomes that signal the work is on the right track and are commensurate with the amount and duration of funding provided. For example, while a long-term outcome may point to the impact an organization is having in the community, a

reasonable outcome for a 12-month grant could be that the organization has greater clarity of how racial equity connects to their mission and a plan for further work to build their organizational capacity.

### *Six-Word Story*

**Focusing, defining, trying, failing, learning, tripping**

Many funders rely on grantee feedback to indicate short-term outcomes in advancing equity inside organizations. Funders ask grantees to identify the changes they want to see as a result of funding and then to report on the extent to which those changes took place. The Robert Sterling Clark Foundation, which practices trust-based philanthropy<sup>1</sup>, gathers this information through conversations with grantees in lieu of written grant reports. The foundation shares questions with grantees in advance to give them time to reflect and prepare.

To get an honest account of changes happening inside organizations working to advance equity, **trust is critical**. DEI work is complex and messy. It requires dismantling practices and policies in order to create space for new ways of working. As a result, many organizations report feelings of taking one step forward and then two steps back when making internal changes, and the work often feels personal and painful. Grantees may be reluctant to share these stories with funders without strong trust that this information is safe to share and that there will be no negative repercussions.

Finally, funders shared they are considering ways to **bring equitable approaches to foundation evaluation** as well. Evaluation involves mining the data and stories of people, which has been harmful to some groups over time. Funders should be mindful of this and consider what this means for their evaluation practice. One simple way to correct for this is to design evaluation products in collaboration with grantees so the information will be useful to them as well.<sup>2</sup>

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<sup>1</sup> Trust-based philanthropy is a movement to address power in philanthropy by reimagining the grantmaker-grantee relationship. There are six principles that comprise this approach. For more information see [www.trustbasedphilanthropy.org](http://www.trustbasedphilanthropy.org).

<sup>2</sup> For more on equitable evaluation practices, see [www.equitableeval.org](http://www.equitableeval.org).

### *The Winthrop Rockefeller Foundation's Approach to Evaluation*

In 2019, the Winthrop Rockefeller Foundation announced a new strategic direction, AR Equity 2025, and a new mission statement — to relentlessly pursue economic, educational, social, ethnic, and racial equity for all Arkansans. AR Equity 2025 describes three bold goals that support the vision of an Arkansas where all residents have jobs that pay a livable wage, a quality education, and the chance to thrive and prosper. The foundation will use various statewide data measures to develop strategy and assess progress toward goals. For example, the foundation will use ALICE (Asset Limited, Income Constrained, Employed) data to understand the number of families that are earning above the federal poverty level but still unable to afford a basic household budget.

One of the first steps in implementing the new strategy is to identify partners most suited to advance the outcomes the foundation desires to achieve and invest in their capacity. To assess progress in this early stage, the foundation will use its theory of action to determine progress milestones:

- 1. Change the Conversation – increase **public awareness** to change knowledge and attitudes*
- 2. Change Who's in the Conversation – build **community-driven models** that reflect the voices and perspectives of residents*
- 3. Change Behavior – support **policy change** to dismantle and rebuild systems*
- 4. Change to an Equity Funder – use an equity audit to identify opportunities to continue the transition of **initiatives and investments** to impact equity outcomes*

For more information on the foundation's strategy, visit [www.wrfoundation.org](http://www.wrfoundation.org).

## Advancing Equity Inside Foundations

Funders acknowledged that advancing equity inside nonprofits requires foundations to reflect on their own culture, policies, and practices, and make changes to pursue equity. All organizations must grapple with the ways in which aspects of white dominant culture show up in their organizations, perpetuate inequities, and cause harm for marginalized individuals. Funders cannot ask grantees to undergo this type of reflection without doing it themselves.

The funders at the gathering are in different places in their internal work and are taking different approaches. Most funders expressed a desire to continuously improve the work happening internally and to learn from other funders. While each foundation is taking a unique approach to advancing equity internally, conversations surfaced some common elements that most funders agreed would be ideal. The following are factors foundations could aspire to in their internal work to advance equity.

### *Six-Word Story*

**Advancing equity to include new voices**

### *Buy-In and Authentic Involvement of Leadership*

Just as for nonprofits, a stated commitment to equity and active engagement from leadership are helpful indicators that the foundation will stick with this work for the long-term and devote resources to it. Many foundations have publicly available equity statements that define what equity means for their organization. At the Barr Foundation, the president and vice president play an active role in the internal DEI working group, and the board chair participates in all trainings, retreats, and working groups organized for staff. This gives leadership deeper insight into the experiences and ideas of staff of varied identities and at all levels of the organization.

### *Multi-Level, Inclusive Approaches*

While leadership buy-in is important, top-down approaches alone are insufficient for advancing equity. Many funders have found it helpful to engage committees or working groups that are representative of various personal identities and levels within the organization. Participating in these groups can be emotionally taxing, especially for people of color. Consider providing compensation or other incentives in recognition for what these individuals are contributing to the organization outside their job descriptions.

### *Balancing Reliance on External Consultants and Building Internal Capacity*

External consultants can provide tremendous value in providing training, offering frameworks and approaches, and providing an outside perspective to deepen self-awareness. At the same time, funders named the importance of building internal capacity to ensure this work can endure. This can include activities such as building the cultural competency of managers or offering program officers tools and resources to help them engage with grantees differently.

### *Reflection on Who Receives Funding and Why*

Historically, much of the work of institutional philanthropy has gone to organizations with white executives. Many organizations leading the way on racial equity, in particular organizations led by people of color, have not benefitted from foundation support. As part of their internal work, some funders are reflecting on their history and practices, as well as who receives funding and who does not. Funders recommended honest reflection on questions such as: Is the foundation working to advance equity among current grantees, regardless of who they are? Does the foundation want to correct for historical inequities by giving resources to those who have previously not had a seat at the table? Or is it a mix of both? When the Kresge Foundation reflected on these questions, they decided they needed to pursue both approaches. The foundation's Detroit program, for example, places highest priority on neighborhood-based, resident-led organizations. At the same time, the foundation funds larger, white-led organizations that are important partners in advancing policy in areas including education, environment, and health. Building the racial equity capacity of these grantees is important as well.

### *Building on the Work Others Have Done*

While it makes sense that each foundation would craft its own approach to advancing equity internally, there is much to learn from what other foundations have done. For example, the Kellogg Foundation and others have found value in using the Intercultural Development Inventory assessment for staff. Several foundations, including the Charles and Lynn Shusterman Family Foundation, have planned trips for staff and board members to travel together to Montgomery, Alabama, for an immersive educational trip to better understand racism and the struggle for civil rights in United States history. Funders called for more sharing of foundations' internal equity work so that they can build on the experiences of others.

### *Honesty and Transparency About the Foundation's Learning With Grantees*

Advancing equity requires humility and vulnerability. Honestly sharing with grantees your own learning and experiences related to equity is important for building credibility and trust. Ideally, funders would not ask grantees to share reflections or experiences without sharing in return. Funders recommended opening conversations on equity with an honest account of personal learning and reflection or what's happening at the foundation.



### *The Bush Foundation's Internal Equity Work*

Since 2012, the Bush Foundation has made a decisive strategic turn to incorporate equity into all aspects of its work, including reworking its leadership programming, internal grantmaking, and operational practices.

The work began with a focus on building a more inclusive culture, which has led to changes in policies and practices across the organization including revised personnel policies, hiring and recruitment policies, and an updated vendor policy. The foundation has also completed the Intercultural Development Inventory twice to gauge its progress over time.

Bush has authored several public papers on lessons learned from applying an equity lens, both overall at the foundation and specifically within their leadership funding, which are available on their website's "[Our Equity Work](#)" page.

## Key Takeaways and Considerations for Sustaining the Work

While funders explored what's working and what's not in a variety of approaches to supporting talent and leadership through a racial equity lens, six common recommendations emerged.

### *In Work with Grantees*

- **Right-size outcome expectations to be commensurate with the amount and duration of support provided.** Advancing equity inside organizations is complex, ongoing work. Set reasonable expectations for what an organization might accomplish in a grant cycle, and help grantees set reasonable expectations for themselves.
- **Create space for sharing and learning about what's working and what's not.** Funders can use their convening power to facilitate learning among grantees, service providers, and other funders to help deepen understanding of promising practices and helpful tools.
- **Trust that grantees know best what support they need and what difference it is making.** As with any capacity-building support, grantees should have a voice in deciding what they need, what changes they hope to see as a result, and how they will know if the work is having the desired effect.
- **Share openly and honestly with grantees about your internal equity work.** This is critical for building trust and credibility with grantees. Funders should show humility and vulnerability if they expect the same of their grantees.

### *In Internal Work*

- **Continue making the case for greater investment in building DEI capacity.** Some described current levels of investment in grantees' DEI capacity as "a drop in the bucket," so more case-making could yield greater investments. Funders encouraged more case-making from white allies as well as a stronger voice from foundation leadership. They also cautioned against preaching to the choir about the importance of this support and instead encouraged reaching out to those who are not yet bought in to the importance of investing in DEI capacity.
- **Consider who is receiving support and who is not.** Is the foundation working to advance equity among current grantees, regardless of who they are? Does the foundation want to correct for historical inequities by giving resources to those who have previously not had a seat at the table? Or are both approaches required to achieve the foundations' goals?

## *Sustaining the Work*

When the funders came together, there was a common desire to find ways to sustain this work so that equity does not become a passing fad or merely the latest philanthropy buzzword. Questions that came up included *How do we ensure this work endures within our grantees and within our foundation?* and *What can we do to support the people who are doing this difficult work?*

While funders came to this conversation with more questions than answers, two common recommendations emerged to help sustain the work, both individually and within organizations.

Most important is the need to continue to make the case for advancing equity, both within foundations and externally. Funders recognized the need for foundations to devote more time and money to this work and to make equity a stated priority. Many funders shared that, despite

### *Six-Word Story*

**Aim for transformation, long journey ahead**

the foundation's stated commitment to equity, funds to support DEI capacity were just a small portion of the foundation's total grantmaking budget, and some foundations are structuring equity work as a side project

or special initiative. There was a desire among funders to see more foundations hold equity central to their work and devote more attention and resources to it.

In addition to making the case for greater investment within foundations currently supporting equity, some funders also identified a need to make the case outside their foundations to other funders who aren't yet prioritizing equity. Funders expressed a desire to see equity as a commonly held value across philanthropy. This is especially important for white people in philanthropy. People of color expressed fatigue about being the ones most often championing equity. It is time for white people to show more courage, use their voices, and be the ones to call for greater investments in equity.

Greater sharing and learning across foundations can also help funders sustain this work. While funders recognized that there are many different approaches organizations can take to supporting nonprofit leaders' DEI capacity, there was a desire to move beyond experimenting with various different approaches and align around promising practices. Funders expressed a desire for more sharing of examples of what's working and what's not working, both in grantmaking and in internal work. This will help move more funders from talk to action.

## Appendix: List of Foundations Represented at the Convening

Barr Foundation  
S. D. Bechtel, Jr. Foundation  
Borealis Philanthropy  
Bush Foundation  
Bill and Melinda Gates Foundation  
Evelyn and Walter Haas Jr., Fund  
William and Flora Hewlett Foundation  
Jim Joseph Foundation  
W.K. Kellogg Foundation  
Kresge Foundation  
Meyer Memorial Trust  
David and Lucille Packard Foundation  
Winthrop Rockefeller Foundation  
Charles and Lynn Schusterman Family Foundation  
Robert Sterling Clark Foundation  
Robert Wood Johnson Foundation