



Incorporating Racial Equity and Inclusion into Communication Strategy

REPG Paper Series

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I. Background

Marga Incorporated provides strategic advice and research to philanthropic initiatives and community partnerships. Marga's Race and Equity in Philanthropy Group ([REPG](#)), created in 2006, brings together foundations that are committed to improving their ability to effectively promote racial equity and inclusion in their policies, systems, and practices. Through peer learning, member foundations are able to incorporate new ideas and practices into their institutional efforts, which can lead to transformative change.

REPG has always aimed to influence both its core foundation members as well as the wider philanthropic field. As a result, REPG has been partnering with various Philanthropy Serving Organizations (PSOs) to bring the peer [learning exchange framework](#) to clusters of their foundation members through a series of learning exchanges. Consequently, REPG has a growing network of affiliates from the Northeast, Midwest, and Southeast. Most recently, REPG has partnered with the [United Philanthropy Forum](#) to launch a pilot that will engage member foundations from four PSOs in a series of three learning exchanges. The initiative is intended to help participants bring new concepts back to their foundations in order to develop or refine their policies, systems, and operations related to racial equity and inclusion. Any foundation seeking to transform its policies and practices around racial equity and inclusion and influence sustained systemic change can benefit from participation in REPG.

REPG's thirteen member foundations not only connect to learn from each other, but they are also committed to sharing their experiences and lessons learned more broadly with the philanthropic field. This brief, the second in a thematic series, explores the ways foundations

are communicating their racial equity, and inclusion perspectives, policies, and practices both internally and externally. Communication is an essential part of advancing a commitment to racial equity and inclusion. Without internal communications to define values and create a shared language it is hard to share a consistent message externally with grantees and partners. And conversely, without externally communicating how a foundation is aligning its internal policies and practices with its values it is hard to lead a charge to advance racial equity externally.

REPG seeks to highlight concrete policies and practices that can be instructive to foundations as they navigate the application of ideas about racial equity and inclusion through practical programs, systems, and operations. The [first brief](#) in the series addressed how foundations are prioritizing a commitment to racial equity in their overall strategic priorities.

This paper provides concrete examples of how REPG member foundations are strategically communicating their commitment to racial equity and inclusion both internally and externally.

Eight foundations from REPG's membership were interviewed to develop the profiles featured in the paper. Foundations profiled include:

- Annie E. Casey Foundation
- East Bay Community Foundation
- Ewing Marion Kauffman Foundation
- James Irvine Foundation
- Lumina Foundation
- San Francisco Foundation
- Walton Foundation
- Winthrop Rockefeller Foundation

The paper begins with an examination of how the philanthropic and nonprofit sector is communicating about racial equity, and diversity, equity, and inclusion (DEI). This is followed by a summary of some of the strategies and themes that emerged from REPG discussions on this topic. Foundation profiles are then featured for each institution

named above. Common themes and broad implications for the field are provided at the end of the paper. ■

II. Status of the Field:

Embedding Racial Equity and Inclusion into Communication Strategy

As the United States continues to reckon with a history of racial injustice, foundations have begun finding their role in the process. Some foundations are increasingly answering the call to action in advancing racial equity. In recent years, a growing number of foundations have been making commitments to incorporate racial equity and inclusion into their institutional strategies, including communications.

Organizations are incorporating more explicit messaging around structural racism in both their external and internal communications in line with novel or renewed organizational commitments to racial equity.

Before the pandemic and the racial uprisings that began in 2020, many foundations and nonprofits were already addressing diversity, equity, and inclusion (DEI), however, often these concepts were not clearly defined and did not address racial equity specifically. According to the Communication Network's report and survey from 2019, [Race and Racism: Doing Good Better](#), the role of racism was mostly absent from available equity literature and resources for communicators in the nonprofit and philanthropic field, and the terms race and racism rarely appeared in organizational DEI definitions. The study also found that organizations have different definitions of DEI,

and communications staff may not have a good understanding of these concepts. In terms of messaging, organizations primarily compare multicultural to colorblind frameworks, however, there is a gap in research around racial equity communications frameworks and how these can shift perspectives.

With regard to internal communication, the study revealed several important themes. Firstly, there is often a disconnect between the way an organization communicates around racial equity and inclusion and its internal policies and practices. This is often most apparent in the demographics of staff, boards, and senior leadership, and existing hiring guidelines can lead to very few people of color in communication roles. Secondly, the work of racial equity and inclusion is intensely personal and difficult to reduce to a few messages or guidelines. It requires every individual to do the work in terms of ongoing self-reflection and learning. Finally, the study notes that racial equity work is important no matter what a person's role within the organization and that coaching, training, and learning should be made available to all. This leads to strong internal communications and culture-building across the foundation and clearer external communication. Further, given the cost of trainings and ongoing

professional development, the study concludes that foundations should also invest in providing this training to their grantees, which will ensure that racial equity communication practices are more effective.

Since 2020 communications about DEI and race and racism have increased in the nonprofit and philanthropic sectors. The Communication Network's findings from a follow-up study and survey in 2021, outlined in the report [DEI and Communications for Good](#), found: an increase in consideration of DEI in message development; an increase in race and racial inequities being included as an "explicit component" of an organization's messaging; and a stronger understanding of DEI concepts among communicators. In particular, using narratives that frame people by their assets and using a racial equity framework – which clearly articulates racial equity, bias, and institutional racism – is more common in communications now than two years ago. At the same time, the report finds that efforts in applying these ideas could still be better supported and defined and that there is a gap between intent and actual efforts. More than half of the organizations surveyed lack a defined process for speaking out on current events related to DEI issues, which reflects an increase from 2019. Moreover, organizational diversity in terms of the average proportion of staff, senior leadership, and Board of Directors represented by people of color has not significantly changed from 2019. While there has been some progress, there is clearly more work to be done.

For foundations and nonprofit institutions that are being more explicit about racial equity and inclusion in their communications strategy, an important consideration is the intent of their messaging. The Opportunity Agenda highlights [Ten Lessons for Talking about Race, Racism, and Racial Justice](#), in which the primary goal of messaging is to persuade audiences to move toward action. One of the lessons is to use values as a bridge to a focus on racial

equity. Opening conversations with shared values to frame society's role in providing a fair chance to everyone can serve as a bridge to discussing the roles of racial equity and inclusion in fulfilling those values for everyone. In this way, audiences can shift their thinking towards solutions rather than skepticism about, for example, the idea of prevailing discrimination or the ability to address it. Related to this it is important to be solution-oriented and to indicate a clear positive action and who is responsible for the action. However, it is essential to recognize that different audiences need different messages given that understanding of racial justice issues varies as does their willingness to engage on this topic. The authors also recommend discussing the systemic obstacles to equal opportunity and equal justice, displaying the links between historical racism and current racial inequities and emphasizing how racial bias prevents us from reaching our full potential as a country. Another key lesson conveyed is to listen to and center the voices of Black, Indigenous, People of Color (BIPOC), which could include listening to anti-racist BIPOC leaders on aspects like preferred language and strategy. ■

III. REPG and Communications

Each REPG meeting focuses on a specific theme identified by the members through discussion. Each topic is then the focus of two to three peer learning discussions. The theme of communication strategy is one that emerged through REPG meeting discussions about institutional strategy as members identified the importance of being able to communicate their foundation's commitment to racial equity. Subsequently, this topic was the subject of discussion for three meetings.

When the discussions first began there was a strong emphasis on the need for foundations to explicitly call out the work they are doing on racial equity and inclusion and to use this language when communicating with external partners. Related to this was the challenge of ensuring that the internal work is aligned before making public statements. As a result, there was a lot of discussion about building the internal capacity of staff and boards to engage in these conversations and defining and establishing a shared language and framing. The importance of narratives and storytelling emerged as a promising practice in this regard, with some REPG members relying on the use of staff equity narratives to help move their boards. A strong emphasis was also placed on the use of asset-framing in developing narratives.

Several REPG members highlighted various internal trainings and onboarding processes that they had developed and reiterated the importance of communicating values at every point of the staff life cycle. Related to this, members spent time sharing about the structures for facilitating discussions and ensuring representation from every department within the foundation.

Subsequent conversations evolved to focus on how racial equity values and language were being incorporated in external communications, whether via grantee applications, social media and blogs, public statements from CEOs, dialogues with donors, and through requests for demographic data from grantees and partners. Other external communication themes included the importance of community conversations, undertaking capacity-building work and technical assistance around racial equity communications for grantees and partners, and sharing learning gained through DEI audits with external audiences to ensure accountability. A challenge that many foundations struggled with was the right balance in language that would allow them to be bold but also bring others into the tent.

Several REPG foundations have undertaken their own research on effective communication strategies for advancing racial equity and inclusion goals and developed guides to share these lessons with the broader field.

For example, the San Francisco Foundation, created [Messaging for Change: SFF Insights and Best Practices in the Field](#), to share the messages that they have developed in order to create a positive narrative shift. The messaging guide also shares several principles that influence SFF's communications, based on insights from leading practitioners. This includes using language that frames people's assets, leading with a vision of what's possible, and naming not just the problems but the actors that can have an impact. Additionally, they emphasize that people respond more to stories and narratives than statistics and that narratives should focus on our shared humanity rather than winners and losers. Finally, they indicate that naming race explicitly when discussing

economic and employment arguments is important given the deep inequities that exist across racial lines. In [Making Opportunity Real: A Framework for Communicating About Racial Equity](#), the Lumina Foundation, presents an adaptable framework for communicating about racial equity in higher education. The framework highlights the following “big ideas” that can motivate people to pay attention and support racial equity efforts: everyone has a right to real opportunity; opportunity isn’t equal; societal policies, practices, and beliefs unfairly hold BIPOC back; and real actions with real outcomes can make opportunity real for all. This last idea suggests that when meaningful actions are taken to remove historical barriers of discrimination for BIPOC, just and fair outcomes can be achieved for all people.

The learning from the REPG discussions led to the decision to develop the next brief in the series on the topic of communication strategy recognizing the importance of this issue for advancing racial equity goals. Following the learning exchange discussions on the topic, REPG members were interviewed to develop profiles on how their communication efforts have been evolving.

The eight member foundations highlighted in this brief are incorporating learning from the REPG discussions as well as other best practices and strategies as they communicate their racial equity policies, practices, and perspectives both internally and externally. ■

IV. REPG Foundation Profiles

The Annie E. Casey Foundation



Mission: To build a brighter future for children, families, and communities.

“A failure to prepare children of color to succeed has profound consequences in a country with an increasingly diverse child population. Broad progress [in child well-being] masks the reality of deep and stubbornly persistent racial and ethnic inequities that erect hurdles for children of color on the road to success.... If we want America to build from the same unlimited potential it always has, we must ensure that the potential of our children is not limited by our policy choices.”

- Lisa Hamilton, President & CEO (Sacramento Bee, August 2019)

Communicating internally about racial equity and inclusion

The Annie E. Casey Foundation’s mission to create a brighter future for children, families, and communities has led to a focus of working and partnering to strengthen policies, leaders, civic practices, and nonprofits to improve the healthy development of children and youth. As the evolution of the country’s demographics drew attention to the reality that kids of color are soon to represent the majority of the total U.S. population, the Casey Foundation understood that its work would not be truly effective until it worked explicitly to remove the well-documented systemic barriers for children of color.

In 1994, a group of staff formed an internal affinity group called RESPECT with the purpose of incorporating conversations about race, culture, and power within the Casey Foundation. Over the years, RESPECT has been a fervent and successful advocate for internal funding for research on racial equity that has contributed to the Foundation’s shift toward equity strategies.

Dedicated efforts at building internal knowledge culminated with an official three-year arc of learning process, which began in 2015 and was aimed at bringing the entire staff to a point of shared knowledge. For the Casey Foundation, augmenting staff knowledge and communicating about racial equity is part of the institutional strategy. The work of the Foundation requires that staff members develop an understanding of the importance of racial equity and the ability to incorporate equity in developing solutions to improve well-being for all children, youth, families, and communities. This intentional learning was coupled with the appointment of staff specifically responsible for racial equity leadership within the Foundation through the Racial and Ethnic Equity Inclusion unit (now the Equity and Inclusion unit). This unit has the responsibility to lead and inform the Foundation on equity, help build staff and grantee capacity and strengthen internal accountability.

Everyone working at the Foundation receives a series of formal trainings accompanied by a set of tools and resources developed to help advance equity practices and strategies. These

resources cover topics such as how to go deeper in initiating conversations about racial inequities, how to use disaggregated data to inform policy practices, and understanding the role of culture in this work. Casey developed [Embracing Racial Equity: 7 Steps to Advance and Embed Race Equity and Inclusion Within Your Organization](#), a foundational resource designed to assist both staff and those within the field to apply an equity lens in their internal and external work. In 2014, the Foundation released the first [Race for Results](#) report under the KIDS COUNT® brand, a collection of data disaggregated by race and ethnicity that offers a state-by-state comparison of how children are progressing on key milestones across racial and ethnic groups. The next [Race for Results report](#), released in 2017, included an updated index and focused on keeping immigrant children with their families.

An internal web portal provides a way to share news about strategies and efforts being undertaken throughout the Foundation and includes a section devoted to racial equity that includes blog posts and new resources. Through this portal, staff is constantly reminded and updated about racial equity and how it relates to the issues they are working on. The Foundation also captures equity data from programs and internal operations through a biannual survey. The survey, designed to align with the seven steps for operationalizing equity, helps the Foundation measure progress in implementing race, equity, and inclusion strategies.

Communicating externally about racial equity and inclusion

Fostering dialogues on racial equity and inclusion is a key feature of the institutional strategy at the Casey Foundation. Senior leaders regularly raise issues of racial equity in external speeches and presentations, and many of the resources and tools for navigating racial equity and inclusion used by staff members

are made available to partners and the general public. Given that Casey is just one of many entities within the philanthropic sector working to acknowledge racial equity work as a core responsibility, Casey maintains a dialogue with other foundations like those in REPG to share strategies and learnings from their work. This is an important aspect of external communication as it offers transparency around institutional values.

Beyond the dissemination of resources and tools for racial equity work, Casey also collaborates with grantees to support their growth and development in racial equity competence. This includes helping them better understand how to advocate for and conduct racial equity impact assessments of policy and how to share this information with others.

Key challenges and factors that have contributed to Casey's progress in communicating about racial equity and inclusion

While Casey understands that mainstreaming such topics requires meaningful conversation at all tiers within an organization, achieving a shared understanding of racial equity comes with challenges. Conversations that center race can still be uncomfortable for people, as they require acknowledging one's role in structural racism. Many have a hard time grappling with the history of these issues. Furthermore, people are entering these conversations from diverse backgrounds and with varying levels of knowledge.

From an organizational perspective, one of the challenges is identifying the right way to structure and frame the conversation so that staff will both hear and receive it. This takes time and requires continuous repetition, including making sure that new staff joining the Foundation are equipped with the tools they need to take up the equity work.

Specific factors that have contributed to Casey's progress in communicating about racial equity and inclusion include both a high level of commitment from leadership as well as the courage and commitment of staff to continually raise racial equity issues even though these conversations can be uncomfortable. While the bottom-up approach was a catalytic factor at the Casey Foundation, equity work would not have been incorporated so quickly into the Foundation's culture without the clearly stated directives of the CEO, which endorsed the importance of equity to the Foundation's mission and provided a framework within which to take efforts to scale. Staff recognizes that racial equity is a critical component of the way the Foundation sees the world and operates. This focus on the structural and institutional aspects of equity is embedded within the culture and ethos of the Foundation. ■

East Bay Community Foundation



Mission: To partner with donors, social movements, and the community to eliminate structural barriers, advance racial equity and transform political, social, and economic outcomes for all who call the East Bay home.

“As an organization committed to advancing racial equity and social justice, East Bay Community Foundation is prepared to take bold measures not only within our grantmaking but throughout the organization, to be 100% mission-aligned, this includes taking some perceived risks and sharing best practices to encourage other philanthropic organizations to join alongside us.”

- **Valerie Red-Horse Mohl**, EBCF’s Chief Financial Officer

Communicating internally about racial equity and inclusion

The East Bay Community Foundation (EBCF) is one of the nation’s oldest community foundations. Given that the East Bay of Northern California is an extremely diverse region, the Foundation strives to ensure that its programs and investments reflect this diversity. The mission of EBCF is to partner with donors, social movements, and the community to eliminate structural barriers, advance racial equity and transform political, social, and economic outcomes for all who call the East Bay home.

In 2016, James Head was named as the CEO & President, and under his direction and leadership, the Foundation committed to an even deeper and bolder dedication to social justice and racial equity. In the Spring of 2019, EBCF announced its new mission and vision for an inclusive, fair, and just East Bay and released a report titled [Towards a Just East Bay](#), which was the culmination of years of work, listening, and learning from community partners and piloting various targeted initiatives in collaboration with community leaders. Although EBCF provides solid and consistent

messaging to its external partners and community, the Foundation has not completed as much work internally with staff on developing a shared language for communicating and defining racial equity/racial justice. In 2019, EBCF organized a Racial Equity Working Group within the senior leadership team to examine the Foundation’s policies, practices, and messaging. They worked periodically with a consultant but, primarily due to the urgent emergency response to the community needs caused by the COVID-19 pandemic, much of this work was interrupted and postponed.

In December 2020, the Racial Equity Working Group was reconvened and reformatted by expanding its size to include staff across the Foundation, regardless of title or position, who were interested in this work. Striving for clarity and sharper focus, they examine what the terms racial equity and racial justice mean for the Foundation. The group has discussed whether to use the term DEI (diversity, equity, and inclusion) because for many people of color the term inclusion represents a power dynamic with which they are not comfortable. The group has considered the work of John A. Powell, who leads the UC Berkeley [Othering and Belonging Institute](#), including his work on democratized

language as they consider changes in language and communication, as well as his concepts of co-authorship and co-creation. EBCF recognizes that it is important to embrace all aspects of equity, including race, religion, nationality, and sexuality but to also consider power dynamics, trust, and decision making.

EBCF has a staff of forty-seven people, ten of whom are in the Racial Equity Working Group. Staff are now engaged and have formed a diverse steering committee across the Foundation. This process has created more staff involvement and understanding about the importance of language and communication in strengthening work amongst the team. The group is committed to transparency and strives for an open forum for communication within the Foundation as well as shared collaborative decision making. To address internal communications, the group reports monthly at the All-Staff meeting. Additionally, it recently developed and administered a survey to staff with in-depth questions to ascertain how the staff thinks the Foundation is doing with regards to racial equity both externally and internally. Thirty-seven of the forty-seven staff members responded to this survey; the responses indicate that the Foundation still has work to do. The group maintains an open invitation to anyone who wishes to be involved. In on-going efforts, the Racial Equity Working Group wants to explore more broadly and deeply how the organization can communicate its values further and consider what kinds of policies should be implemented. The Working Group plans to take its time to thoughtfully review the survey responses as well as to then develop a work plan which may include working long term with a consultant.

In its employment practices, the Foundation communicates its commitment to racial equity in job descriptions, on the website, through programs, and discussions held during the interview process.

Communicating externally about racial equity and inclusion

EBCF's goal is to be 100% mission-aligned in all that it does.

The EBCF's commitment to racial equity and its mission is reflected throughout its messaging, programming, and work. It can be found in visual imagery as well as in written communication on its website, in newsletters, on donor profiles, in its news blog, and reports. The Foundation also makes extensive use of social media in its communication strategy.

EBCF communicates its racial equity values programmatically through many of its programs. One capacity-building program, called Accelerating and Stabilizing Communities through Equitable Nonprofit Development (ASCEND: BLO), has an emphasis on Black-led organizations. Informed by a 2017 report that less than two percent (2%) of funding from the nation's top foundations is specifically targeted to the Black community, EBCF works with a group of funders to provide capacity-building grants that put race in the center of philanthropy. Officially launched in 2019, this program addresses networking, capacity building, and organizational stability.

Another way that EBCF communicates its racial equity values externally is by examining the social impact and racial diversity of its investments. In 2018, the Foundation began a series of activities to ensure that its financial investments aligned with its organizational values. In 2019 they created an Opportunity Pool whereby those assets are required to be invested in BIPOC, women, or disabled fund managers (MWDs). In 2020 they hired Valerie Red-Horse Mohl as CFO, a Native American woman with an extensive finance and investment background in asset management with racial equity and Environmental, Social, and Governance (ESG) priorities. With her guidance and leadership, in 2021 the

foundation's investment committee updated its Investment Policy Statement, ("IPS") to codify a quadruple bottom line and made advances within impact investing across all asset classes of the organization.

EBCF is finding new ways to engage donors and partners in [impact investing](#) opportunities. In all areas of impact investing, EBCF is sharing best practices with many other community foundations. EBCF is building a roadmap for other foundations and investment consultants to examine how to assess if a fund is aligned with a foundation's values. Staff work with external portfolio managers to help them understand EBCF's priorities. When they identify misaligned strategies (such as investments in organizations that do not have equity in pay based on gender or race), they help the partner organizations to understand EBCF's position and to encourage change as needed. EBCF strives to be a role model to others, in any part of the country, to have equity embedded in the fabric of everything that they do. On the drawing board but not yet introduced are strategies to ensure that mission-aligned investments are made with employee 401K accounts and in vendor selections across the organization. EBCF's roadmap will help other organizations look at the entire culture of their work and know where their money is being invested.

Within grantmaking at EBCF, equity messaging is reflected in the online portal. The Foundation is working on a process to codify its social values and protocols for grantees for full transparency and to ensure clear messaging, donor organizing, and broad alignment with its values. For example, in grant agreements, the Foundation has included a statement that they reserve the right to refuse to make grants to any organization on the [Southern Poverty Law Center's Hate Group List](#). For EBCF, this suggests that the organization would not be mission aligned with its values.

Key factors and challenges that have contributed to EBCF's progress in communicating about racial equity and inclusion.

Several key factors that have contributed to the Foundation's progress include staff involvement and the use of consultants. EBCF is a Black-led organization that has a remarkably diverse staff. Senior staff have played a major role in EBCF's racial equity work by leading the early work of the Racial Equity Working Group and laying a strong foundation for the direction of the organization. With the expansion of the Racial Equity Working Group to include staff at all levels, this work is embedded across all departments. There is no single staff person or department responsible for leading the Foundation's equity efforts. Also, by including staff at all levels, there is an understanding of how everyone thinks about this work, not just the senior leadership.

EBCF uses external consultants to help staff have tools and skill-building sets. They lead exercises, training, and media messaging across the spectrum of its publications, technology platforms, and other communication channels. This promotes consistency in knowledge and messaging across the Foundation. Often the work with consultants makes people more comfortable in discussions. One of the challenges for EBCF is that less focus was placed on internal work around racial equity initially. With a large staff who have a broad range of perspectives, some of which come from lived experiences, it can be difficult to determine how far to go with language. It can also be complicated to codify a set of diverse values across the range of programs and donor-advised funds that the Foundation manages and supports. The Racial Equity Working Group now looks closely at its internal culture and asks what kind of policies they should be implementing and what they are missing if they want to be 100% mission-aligned including organizational equity, trust, and collaborative decision making. ■

Ewing Marion Kauffman Foundation



Mission: To help individuals attain economic independence by advancing educational achievement and entrepreneurial success.

“We are early and earnest in our approach to Racial Equity, Diversity, and Inclusion. It takes devoted time and concentrated intention. However, it’s necessary for our culture to be one of belonging if we are going to meet the aspiration of our mission and have the impact we seek.”
- **Wendy Guillies**, President and CEO

Communicating internally about racial equity and inclusion

The mission of the Ewing Marion Kauffman Foundation, one of the largest private foundations in the US, is to help individuals attain economic independence by advancing educational achievement and entrepreneurial success.

The Kauffman Foundation started on a dedicated journey to embed diversity, equity, and inclusion (DEI) into its work, from programmatic to internal efforts as a result of external factors. The Foundation had partnered with Promise54 to begin work on a [DEI Accelerator](#) program and ten of its grantees attended the training. However, it soon became apparent that the Foundation itself needed to engage in this work as much as its grantees. Subsequently, staff from the Foundation went through the training, which included 250 participants. The training provided staff with the opportunity to engage with other foundations as they developed DEI plans, and to provide as well as receive feedback.

Subsequently, a team of six associates from across Kauffman, who participated in the Accelerator program, spent more than a year working together, building relationships and

trust, and building the muscle required to do the work internally. The Foundation believed that creating diverse, equitable, and inclusive teams was central for it to carry out its mission. Initially, the work was referred to as DEI. Over time language changed as awareness changed. The Foundation now refers to the work as Racial Equity, Diversity and Inclusion (REDI). Initial internal communications involved the team of six hosting monthly “lunch and learn” gatherings across the organization to discuss why impact mattered more than intent. Substantial learning and growth occurred. In time, the Foundation launched a year of REDI skill-building led by the CEO, a 15 person REDI Change Team and the Senior Leadership Team. The team convenes associates from across the organization for regular professional development, facilitated by external providers, and provides space for racial affinity group meetings.

Kauffman is at the beginning stages of its REDI work and is moving towards more consistent messaging and clarity. The REDI team published an article, [The urgent, messy, imperfect work none of us should hide from](#), to share its journey and the learning along the way. It highlighted the importance of building trust in work with colleagues, bringing one’s whole self to the effort, grounding the work in

authenticity and vulnerability, allowing grace and space to make mistakes, valuing listening and sharing, and accepting that this work is layered and complex.

Communicating externally about racial equity and inclusion

Kauffman first began to communicate externally about racial equity in 2018, given discussions staff had been having in the community around crime, school discipline, and improving education outcomes, which did not directly address race. In conjunction with the Mayor's office, and several other partners the Foundation held its first [Racial Equity Institute \(REI\)](#) seminar. However, the Foundation received a lot of push back and it was apparent that the climate was not conducive for bold discussions about race at that time. A year later, the business community became a driving force for the Foundation to more deliberately address racial equity. The Foundation subsequently partnered with the Civic Council of Greater Kansas City and members of the business community to market and recruit people into the REI seminar. Initially, more people from the business community went through the REI training than from within the Foundation. With this external push, the Foundation was faced with the realization that it could not lead the community in a racial equity conversation without having its own internal conversations on race. Kauffman decided to underwrite the cost for REI seminars to accommodate the full participation of its staff and any interested group in the community. To date, over 600 people have gone through these data-driven and fact-based trainings, which help participants understand systemic issues behind racial inequities. Even during COVID, the Foundation still regularly offers these seminars.

Today, Kauffman's commitment to racial equity is most evident in its mission—"In the spirit of [Ewing Marion Kauffman](#), we seek to build inclusive prosperity through a prepared

workforce and entrepreneur-focused economic development by changing the conditions, addressing root causes, and breaking down systemic barriers that create inequities based on race, gender, and geography." Their website opens with a [message from the CEO](#), a [REDI](#) portal, and [REDI FAQ](#) page. Additionally, the foundation communicates its commitment through publications and grantee stories, such as in its [CURRENTS](#) newsletter, and communications from the CEO. A discussion about the Foundation's REDI focus is often included in social media, newsletters, and emails. Additionally, the Foundation is beginning to make more use of data to reflect its work.

Internally, a cross-organizational group of associates led the organization through a process to revise Kauffman's CREDO to reflect the organization's commitment to racial equity, diversity, and inclusion. The revised CREDO reads "As stewards of Ewing Marion Kauffman's legacy, our work is grounded in truth, racial equity, and learning. We will pursue impact, guided by dignity, humor, grace, humility, and openness." The group also created a racial equity statement to anchor how the foundation does its work:

While we come from different backgrounds, we share the same commitment to treat one another with dignity. We work alongside communities to end systems of privilege, fear, racism, and entrenched bias, including our own.

When one of us struggles, we all struggle. For this reason, we must hold each other accountable to create a place ...

*Where every person is seen.
Where every voice is heard for the intent and impact it carries.
Where every idea has an opportunity.
Where everyone belongs and knows acceptance.
Where our differences and discomforts make us*

stronger.

Where every race, gender, sexuality, religion, culture, nationality, ethnicity, ability, age, experience, and other identities we hold guide us on our imperfect path to a better Foundation.

The REDI Credo is one of the first things that associates see when they log onto the Foundation's intranet. And both the Credo and racial equity statement are displayed in the building. Kauffman is currently threading these values in work across the Foundation by utilizing existing leadership to champion this work, learning to practice accountability and repair, and continuing its journey through a lens of inquiry and learning.

Using the knowledge gained from REI and its REDI efforts, Kauffman continues a trajectory to strengthen its racial equity and inclusion efforts. In terms of communicating with grantees, this is an area that is still evolving. The Foundation aims for messaging to be reflected in grantee applications, letters, and notices in the future and has begun to collect demographic data on grantee boards, leadership, staff, and beneficiaries – both by race and gender.

Key challenges and factors that have contributed to the Kauffman Foundation's progress in communicating about racial equity and inclusion

Several key factors have aided Kauffman in its progress. The most prominent among them is having a strong commitment and clear communication from leadership. Having a CEO who is willing to be open and vulnerable and act as a champion for this work has been important. The CEO regularly communicates about the REDI work in weekly posts, at staff professional development sessions, and in much of her external communications. Additionally, she is present at REDI meetings and provides direct feedback to staff.

As a result of the year-long work supported

by its external advisors, staff also had an opportunity to share individual experiences and stories of how they experienced the Foundation, particularly around race and microaggressions. This systematic collection of data has been particularly helpful in showcasing the problems and creating a sense of urgency around how to address these issues internally.

Another major key to the progress that has been made is the expansion of the REDI group from six to thirty members which includes senior leadership on the team. As senior leaders were brought into the work, it created more buy-in and signaled that the work would move forward.

One of the biggest challenges has been internal communications, which has often been ad hoc. While the internal staff group that began the work wanted to be inclusive in the process and decision-making, this often led to a lack of clear ownership over communication. However, moving forward the Foundation has begun to think about where the ownership for communication and the broader strategy sits and to ensure that this is both inclusive and clear. Additionally, Kauffman wants to ensure that communication is "bi-directional" - that it communicates out to its staff but also builds more ways for staff to communicate internally and discuss how they can learn from their grantee partners.

Another challenge is where staff are in their personal journey and the recognition that there is wide variability in where each person is in their learning and engagement in this work. One consistent point of tension has been the desire by some for "more, faster" and the sense from others that this is "too much, too fast." That challenge is still present today.

Much of this journey has been rooted in the idea that the team needs to start with themselves. One example is that the Talent & Culture strategy called for diverse, high performing teams and it was only in digging

into that strategy that the team recognized the need for an overhaul of the Foundation’s talent attraction practices – from the need for more diverse networks to consistent use of practices like “two in the pool”, hiring rubrics, and diverse hiring teams. These practices have led to gains with the Foundation moving from 11% POC to 30% POC and a recent annual reflection on the state-of-talent noting that the bar has been raised on what “high performing” looks like. This now extends into practices like pay equity and representation studies, an overhauled paid internship program, and a racially diverse talent & culture team. And, even with this progress, there is still much work to do with each team internally working to take a racial equity lens to their own policies and practices.

As is the case with most foundations, the events of the last year upended and changed how Kauffman planned to communicate externally. Additionally, the Foundation was still working on its strategy and messaging around racial equity which made it challenging to generate cohesive external messaging. Instead, staff engaged in more informal external communication around COVID relief grants and equity funds. ■

The James Irvine Foundation



Mission: To expand opportunity for the people of California.

"I deeply believe in transparency, which is one of Irvine's values, so communicating what we believe and are doing about diversity, equity, and inclusion is important – even while things are evolving and deepening. Communicating about DEI is also more than just words; it's who we are, how we show up, who we invest in, and how we learn and adapt on our journey to become an anti-racist funder."

- **Don Howard**, President and CEO

Communicating internally about racial equity and inclusion

The North Star of The James Irvine Foundation is a California where all low-income workers have the power to advance economically. Underlying this is a recognition that discrimination and exclusion in policies and practices have blocked opportunities for many individuals and communities. Further, the Foundation recognizes that there is a need to level the playing field to help millions of Californians overcome historical barriers and institutional obstacles to prosperity. These barriers include race, ethnicity, immigration status, and gender, among others.

In 2016, Irvine deepened its focus to create a more diverse, equitable, and inclusive (DEI) culture at the Foundation. Subsequently, a DEI Staff Advisory Committee was created to develop recommendations around DEI-related activities. The key goals of the committee include defining DEI and operationalizing policies and practices throughout the Foundation. The committee has played a role in determining priorities and activities that staff can undertake and regularly communicates with staff via email or in staff meetings. One initiative that the committee developed was a series of voluntary DiaLabs, which were discussion groups, co-facilitated by two staff members

trained as inclusive facilitators, where staff could share stories, ideas, and concerns related to DEI issues. These labs included participation from across departments and levels and, subsequently, those that participated carried those experiences into their work.

The Foundation also underwent a process to redefine its organizational values, which are Accountability, Empathy, Equity, Nimbleness, Partnership, and Transparency. The conversations and activities around developing those values are another mechanism by which the Foundation communicates internally about how it operates and acts in alignment with those values. For Irvine, equity means fair and just outcomes for all Californians and eliminating barriers that prevent full participation. To reflect this value internally, the talent system was revamped with a focus on pay equity, where salaries are no longer negotiated but positions are paid relative to the market across the organization. Performance ratings have been abolished and replaced with a focus on development, where every employee is given a pathway within their current position that encourages growth and is rewarded with meaningful compensation increases as they progress.

Communicating externally about racial equity and inclusion

Many grantmaking staff across Irvine use a racial equity lens in their work, including in Irvine's key initiatives, [Better Careers](#), [Fair Work](#), and [Priority Communities](#). One external communication example about racial equity comes from 2019 when Irvine completed a pilot of the Priority Regions expansion (a precursor to Priority Communities), an effort to support under-resourced regions of inland California. Irvine conducted listening sessions with residents of Fresno and Salinas to collect feedback that would help to inform the strategic approach of the initiative in its next phase. In line with findings from data and research, conversations with community stakeholders illuminated the extent to which racial inequities stymie economic advancement. Irvine published a [blog](#) about its learnings, and dialogue with the communities helped guide strategy at the foundation.

The Foundation also communicates about its DEI work externally via its website. A [DEI section](#) on the site shares Irvine's commitment to DEI and communicates various aspects of its internal and external work. For example, the Foundation shares the diversity of its staff, board, as well as the diversity of the staff and boards of the organizations it funds. Staff and board members self-identify their demographics.

Irvine also regularly publishes blogs that highlight the realities of economic justice and racial equity and inclusion in California. One recent [publication](#) emphasized the need to delineate Asian-American and Pacific Islander as a category for race or ethnicity to reflect the diverse identities and experiences. Irvine issued a grant to the Public Religion Research Institute for a California Workers Study that revealed crucial insights into the lived experiences of AAPI workers.

Irvine has also stood in solidarity with communities of color, issuing statements at key inflection points such as in 2017 when [immigrants](#) were the targets of divisive rhetoric and policies and recently when our nation saw an [increase in violence against the AAPI community](#). By communicating externally about these topics, Irvine lends its voice and influence to the needs of under-resourced communities while also demonstrating its commitment to racial equity and improved economic outcomes in California.

Key challenges and factors that have contributed to Irvine's progress in communicating about racial equity and inclusion

Some of the challenges the Foundation faced in making progress are related to capacity constraints and not having a dedicated senior staff member working on these issues (until recently). Additionally, the lack of a shared institutional understanding of or an institutional statement about racial equity that would provide a level of alignment and clarity has been a challenge. While the DEI work that staff is undertaking has evolved organically and achieved some milestones, there was a lack of a shared language or 101 training to ensure a common institutional understanding of racial equity until new efforts began in 2020.

Like other foundations, Irvine also faced challenges in thinking about how to fully communicate about and address diversity, equity, and inclusion. There is a tendency in many foundations to focus only on one piece, such as diversity, but creating inclusive and equitable environments and policies is more complex. Related to this the Foundation has struggled with whether and how to share, whether internally or externally when work is still in progress.

Another challenge when engaging in an internal DEI process is the balance between being inclusive and collaborative while simultaneously

coming to timely decisions that staff support.

In terms of factors that have been helpful in communicating about racial equity and DEI, having the explicit support of the CEO, who has invested in the process by providing staff with the time and resources to run the DEI Committee, has been critical. Additionally, providing space for staff to lead and shape the work with support but not interference has contributed to progress. Finally, Irvine has been intentional about recruiting staff and board members who have an understanding of or direct experience with the communities that the Foundation is serving. As a result, the staff and board are racially diverse and while this doesn't mean they have a shared institutional understanding about racial equity, recruiting staff and board members with relevant experience and facility with racial equity has been an important step in the journey.

The journey continues

The Foundation made a significant shift in communicating about racial equity and inclusion in the summer of 2020 when it announced its [racial equity commitment](#) in response to the death of George Floyd and ensuing racial reckoning. Irvine recognized that if it were to effectively rise to the moment as a grantmaker, the Foundation had to examine its knowledge and understanding of race across the institution.

To guide its efforts, Irvine asked how it could address racial equity within its [North Star](#). In response, the Foundation committed to an intentional process to embed racial equity in its programs, operations, and investments and grant an additional \$20 million to confront anti-Black racism and advance racial equity. 2021 goals include:

- Building a shared definition and understanding of racial equity across the organization and amongst board and staff (with learning and coaching opportunities at

the board and staff level)

- Grantmaking
- Developing an organizational framework or case statement that articulates how Irvine will define and embed racial equity across its programs, operations, and investments

Irvine established a Racial Equity Project board-staff steering committee, chaired by its CEO and Irvine's Board Chair and a staff support team to guide the work. The Foundation has also reported on its commitment, learnings, and progress externally via its [2021 Grantmaking Portfolio Review](#) (pg. 19), and various blogs, including Reflections on [Irvine's Racial Equity work](#). ■

Lumina Foundation



Mission: To prepare people for informed citizenship and success in a global economy.

“How we talk about the need for racial justice and equity in education—and in society—is an essential element of our effort to create a better-educated country. That’s true whether we are talking among ourselves or with people who can influence how we achieve justice.”

– **Jamie Merisotis**, President and CEO

Communicating internally about racial equity and inclusion

Lumina Foundation’s mission is to prepare people for informed citizenship and for success in a global economy. The foundation is committed to expanding educational opportunities for people who are Black, Hispanic, Latino, Native American, or identify among Asian nationalities who also encounter barriers to success in existing education systems. Lumina’s efforts support a national goal that, by 2025, 60 percent of working-age Americans have college degrees or other credentials that represent what they know and can do and lead to further education and outcomes such as higher wages, promotions, and new careers.

Lumina’s integration of racial justice and equity into its core work has followed an arc that began in 2014. Through a series of internal conversations, the foundation began to define equity. While Lumina initially struggled with broader diversity, equity, and inclusion conversations, it ultimately settled on racial equity as the focus. These internal conversations were an important part of the process. Following this, the foundation created a statement, known as its Equity Imperative. This initial document largely focused on external elements such as what is expected of grantees and other partners. It did not address

what the foundation would do internally to address racial equity. As a result, this statement evolved into Lumina’s [Commitment to Racial Equity](#), which is inward- and outward-facing and highlights what the foundation commits to as an organization.

Lumina also established an Equity Workgroup several years ago, which is an internal body that meets regularly and addresses how the foundation is addressing racial equity in various aspects of its work, including finance, operations, communications, and programs. The foundation has made a concerted effort to recruit and hire people of color and appoint board members of color, and the staff and board’s composition reflect this effort. The foundation also publicly shares [demographic](#) information about the staff and board. However, the foundation understood that hiring more people who are Black and brown was insufficient and that it had to build an inclusive workplace. As a result, the Equity Workgroup brought in the Rev. Jamie Washington, Ph.D., to facilitate discussions among staff members on racial equity and inclusion. These conversations have continued in the form of a Racial Equity Masterclass facilitated by ABFE, a philanthropic partnership for Black communities. The Masterclass includes Lumina staffers and grantees and contractors who perform accounting, finance, communications, programmatic and other work.

Communicating externally about racial equity and inclusion

Lumina's Commitment to Racial Equity is posted on its website and included with each new grant agreement. A new portal also was launched so that racial equity is prominent at every point of engagement with the foundation.

Through Lumina's [equity-first](#) approach, the foundation conveys to partners such as contractors, grantees, and other vendors that racial equity is at the forefront of its efforts. The foundation has a [partner survey](#) that collects uniform demographic information from its partners and asks specifically about applicants' commitments to equity prior to submitting a proposal. This information is collected and shared with all staff and provides an opportunity for the foundation to broaden its spectrum of partners.

The foundation also renewed its commitment to a [Racial Justice and Equity Fund](#), which is designed to support organizations and projects dedicated to eradicating structural racism. However, all of the foundation's work must speak to addressing racial equity in some way.

The foundation also has made a concerted effort to reach people who are not already supportive of the need to achieve racial equity. Lumina engaged Hattaway Communications to help create a framework for discussing racial disparities in education in ways that resonate with different audiences. This project involved surveying [existing literature](#), interviewing [grantee organizations](#), conducting a [national survey](#), and testing the language to develop a [toolkit](#). The foundation is intentional about providing these materials to its partners, along with advice from Hattaway on how to use the materials. An interactive quiz and other resources also are available on Lumina's website, under "[Talking about Race](#)."

Another communication approach the

foundation has taken is to create staff equity narratives to help its audiences understand how staffers' encounters with race have influenced their work on behalf of Lumina. The idea emerged from a REPG meeting during which Winthrop Rockefeller Foundation shared a similar undertaking. Lumina invited staff members to work with the communications team to share their personal journeys. These [narratives](#) are on the website and Medium as blogs and videos. It has been an effective way of bolstering the foundation's efforts to talk about racial equity—and it has received [national attention](#).

Key challenges and factors that have contributed to Lumina's progress in communicating about racial equity and inclusion.

Racial equity is part of the foundation's [organizational identity](#). Also, Lumina's communications team, which is effective at influencing public narratives, produces and supports a stream of content that ties the equity-related work together, including public and nonprofit media coverage of racial issues.

Current events have forced Lumina to move further and faster. Internally, the foundation offers its staff opportunities to share what they are experiencing in response to events such as George Floyd's murder by police and the attack on the U.S. Capitol. This provision of space and place to share and process affects how the organization operates. It allows staff to be honest and creates a greater understanding of what colleagues are feeling.

Even within such safe spaces, there is the challenge of language and how different staff talk about racial issues. While the foundation has a message frame for external storytelling, staff often use more direct language or shorthand when discussing racial issues (e.g., referring to George Floyd being murdered before a jury had rendered its verdict).

Nonetheless, Lumina views it as essential to provide time for staff to have difficult conversations and to challenge others within the organization to step out of their comfort zones.

Another challenge has been the representation of people of color on the executive team even as the foundation has become more racially and ethnically diverse. This reflects a significant problem within philanthropy. It underscores the importance of internal equity work—alongside the external—to achieve the greatest level of effectiveness.

One issue Lumina is grappling with is how to acknowledge the progress that partners are making while supporting their efforts to do more. The foundation has developed competencies it wants its partners to develop or possess and is providing them with resources such as the Masterclass to gain these skills and abilities. Lumina will work with other partners to highlight the importance of communicating about racial equity, both internally and externally. ■

San Francisco Foundation



Mission: To mobilize resources and act as a catalyst for change to build strong communities, foster civic leadership, and promote philanthropy in the San Francisco Bay Area.

“Advancing racial equity is messy, complex, and essential. We must be clear and humble as we enter conversations. Lack either and we risk losing the trust of communities who are rightfully suspicious of philanthropic organizations. To truly serve the community, we must also engage in deliberate and difficult internal conversations and culture building within the foundation.”

- **Fred Blackwell**, CEO

The San Francisco Foundation (SFF) began its racial equity journey over six years ago when Fred Blackwell joined as CEO. The foundation’s North Star is to advance racial equity and economic inclusion in the San Francisco Bay Area. This North Star is lofty, and the foundation aims to weave it into every facet of the organization including its grantmaking, partnership with donors, policy work, impact investing, and internal operations.

Since the Foundation began its racial equity journey, many changes have occurred and continue to evolve inside the organization. Initially, these changes were not shared externally. However, over the years SFF has realized the importance of sharing its journey and being transparent about both progress and setbacks. They aspire to encourage others to join in advancing racial equity and economic inclusion. As a result, Foundation leadership has been called on to share their equity journey with others in the field and to be a leader in this space, which has enabled them to build bridges with other philanthropic and sector partners.

Communicating internally about racial equity and inclusion

In addition to ensuring that internal structures

reflect racial equity, Foundation leadership recognizes the importance of sharing and communicating the journey with staff along the way.

The Foundation is intentional in communicating with staff about the external elements of their racial equity strategy to ensure there is alignment and understanding. Recognizing the importance of narrative change and utilizing an asset frame, SFF developed a [Messaging Guide](#) to ensure that all staff is aligned in the way they talk about the work, the language they use, and the impact that they seek through communications. This guide has been a valuable tool to ensure alignment.

Additionally, the Foundation offers concrete supports to help ensure that staff can continue their racial equity learning journey throughout their work at the foundation.

- San Francisco Foundation University - SFF communicates its perspectives and policies around racial equity with new staff as they join the organization. San Francisco Foundation University is an onboarding platform through which cohorts of hires go through an organizational learning process that focuses on racial equity and creating a

baseline understanding for all staff, along with internal structure and processes.

- ‘Learning Together’ is an organizational series in which staff listens to external practitioners and experts. In addition to building community, these sessions provide space for staff to reflect on integrating this learning into their internal practices as well as their relationships with the community and other sector partners.
- Affinity Groups - SFF also creates space for staff to join affinity groups. These groups allow staff to engage with colleagues more organically and to grapple with their questions and feelings around race, systems of oppression, and the current racial uprisings.

Communicating externally about racial equity and inclusion

As part of its ongoing racial equity journey, SFF is changing how it relates to the community. As a strategic grantmaker addressing policy and systems change, SFF is moving away from a traditional philanthropic model to actively examining power dynamics with its community. SFF is intentional about listening to the community to help drive and build the work. For example, through consultative sessions and interviews with community members, housing was identified as a major challenge in the Bay Area. As a result, SFF elevated housing and housing policy as an organizational focus.

Two years ago, SFF entered into a partnership with the Hewlett Foundation which provides [\\$7.5 million in funding](#) to SFF to lead the work in addressing the Bay Area’s housing crisis. One of the areas of focus of that funding is aimed at strategic communications.

Reflecting its ongoing commitment to listening to the community, the foundation is creating a platform for community voices. The foundation hosts events that elevate community voices and use social media and blogs to share work that

is happening across the Bay Area, especially grantee efforts that advance racial equity.

Through their external communication strategy, SFF has highlighted the realities of racial and economic inequities in the Bay Area and their contribution to addressing those inequities. It helped support the development of the Bay Area Equity Atlas which is a comprehensive data support system to track the state of equity across the region and inform solutions for inclusive prosperity. Using this tool, advocates have the data necessary to support their platforms and advocacy campaigns.

SFF also communicates its racial equity values with donors. The Foundation recently launched [Donor Dialogues](#), a series for donors to join the equity journey and to align donors with the foundation’s North Star.

In the interest of transparency, the foundation is in its third year of displaying [Diversity Data](#) on its website. This data provides a snapshot of the demographics of its staff, Board of Trustees, consultants, grantee leaders, and investment managers.

Key challenges and factors that have contributed to SFF’s progress in communicating about racial equity and inclusion

While SFF has made a lot of progress in its equity journey it has not been without challenges. One key challenge is the current moment and the intense media focus on racial equity and diversity, equity and inclusion (DEI). While this has been very helpful in starting more conversations and raising awareness, it has also been difficult to cut through the clutter and sustain meaningful engagement with its audiences when these topics are trivialized and sensationalized in the news.

It has been a challenge to ensure that all staff have similar language to communicate

with one voice. The Messaging Guide has been a promising tool in this regard to create alignment around how to verbalize collective contributions to and aspirations for the sector as a philanthropic organization.

Much like other foundations, SFF is continuing to grapple with the power and privilege of the philanthropic sector and asking questions about who has control over resources and how they can help to shift power to those who have been marginalized. They are focusing on the principle of transformative solidarity and considering not just the immediate impact of their intentions in the moment but the long-term impact and effects of what they communicate and how they engage with communities who have been harmed by systems of oppression and denied resources.

One factor that has been particularly helpful in ensuring progress has been the overall commitment and alignment with the North Star throughout the organization. This has provided the freedom and clarity to communicate about racial equity both internally and externally. Without that shared understanding, having a coordinated messaging strategy would be difficult. Related to this, the San Francisco Foundation University onboarding process has ensured that new staff are grounded in the mission and brought along on the learning journey.

SFF has also focused on contributing to narrative change both internally and externally, and the Messaging Guide has been particularly helpful in this regard. The guide has supported the Foundation in not only considering how it uses its voice but also how it is bringing in the voices of the community.

Recognizing that data systems can be a form of storytelling, which can contribute to narrative change, SFF has found that sharing its internal DEI data has been very helpful in its journey because it has illuminated the gaps

and areas where the foundation needs to do more work. In the same way, the Bay Area Equity Atlas provides a way to tell the story of what is happening in the region. Through the use of these data systems, SFF can share the story around racial equity and its progress and contribute to narrative change. ■

Walton Family Foundation

WALTON FAMILY
FOUNDATION

Mission: A family-led foundation that tackles tough social and environmental problems with urgency and a long-term approach to create access to opportunity for people and communities.

“As we launch a new five-year strategy for the Walton Family Foundation, we renew our commitment to ensuring community voices are not only heard but that people have a seat at the table to create the solutions that will shape the trajectory of their lives.”

- **Caryl M. Stern**, Executive Director

Communicating internally about racial equity and inclusion

The Walton Family Foundation sees equity as an important part of its strategic plan, and an issue that impacts all its program areas, from K-12 education to the environment, to the success of its home region. It is a thread that runs across all programs.

Internally WFF ensures that staff is regularly hearing from the leadership about diversity, equity, and inclusion (DEI) issues and that staff understand the importance of not only being inclusive internally but approaching the work with that mindset. These messages are delivered both by Program Directors and the Executive Director through various internal channels, such as weekly newsletters, the intranet, or via formal and informal conversations with staff and individual teams.

WFF’s commitment to DEI is actively discussed throughout the staff lifecycle and the Foundation is currently reviewing each stage of the staff experience to ensure its language, policies, practices, and processes reflect this commitment to DEI. WFF’s onboarding materials prominently display its DEI mission, how it defines DEI and the areas in which it is concentrating its DEI efforts. WFF actively uses its weekly newsletter, Slack, and working groups to discuss and share

learning opportunities and resources to expand awareness and understanding to help further embed its DEI principles into daily norms and practices.

Communicating externally about racial equity and inclusion

Externally, the Foundation focuses on a mix of institutional messages from leaders, delivered from platforms such as its [blogs](#), social media channels, and its email database. Additionally, WFF dedicates capacity on its channels to the voices of its grantees, either through telling their stories or empowering grantees to share their stories directly via WFF’s platforms. Last year the Foundation was also intentional about pausing external communications at certain points and understanding when it was more important to stop and listen.

WFF has hosted several webinars with its grantees throughout the year and shared newsletters in which a lot of the content is dedicated to issues of racial equity and how racial equity impacts each of its program areas. Additionally, they have highlighted those who work within its program areas.

Key challenges and factors that have contributed to Walton Family Foundation’s progress in communicating about racial equity and inclusion

Having a strong connection between its values of equity and inclusion and the goals and visions for its program areas gives the Foundation the ability to communicate authentically. Additionally, as it continues to learn and improve internally, the Foundation has created a new senior-level [Equity and Inclusion Program Director](#) role, which will focus on strengthening partnerships and practices across all areas of the Foundation both internally and externally. The decision to create this role was a recognition that equity and inclusion is not an isolated or siloed area of work for one person or one team but rather should cut across all of the Foundation's work.

For WFF, a strength of its internal communication has been its leaders and staff who are ready to learn and willing to help others understand and learn. This environment is critical for all types of communication that the Foundation may undertake around equity and inclusion. The executive leadership team issued a joint statement of their commitment to DEI for the organization and its associates. This has set a level of expectation that DEI will be embedded in the work to foster an inclusive environment. The leadership team also established a working group of associates to support the Foundation's collective learning journey and to serve as DEI champions in their respective teams and geographies. The leadership team's commitment combined with the staff engagement has allowed the Foundation as a whole to learn and grow together and to actively review policies and practices and make adjustments where needed to create an inclusive workplace.

Externally, its grantee community has been an important partner in how WFF has communicated how its values and principles are manifested in its work. Featuring its grantees' work or providing them the space to discuss this work in their voice has been a critical component of its external communication about issues related to racial equity. The Foundation is also beginning to explore how to provide

technical assistance to support its grantees in their communication efforts.

The collaborative nature of the philanthropic sector has also been particularly helpful for WFF in its journey. Groups such as REPG have provided space for the Foundation to hear honestly about what works and what doesn't and to learn from other foundations.

One of the biggest challenges with communication around racial equity has been the pace of events in 2020. Being able to communicate authentically and determining when to speak and when to listen has been a challenge. WFF wants to ensure that it is speaking when there is an authentic connection to its work. Over the last year, with the volume of communication, WFF looked to its peers to understand what they were communicating to determine the right moments to join the conversation.

Another challenge internally has been balancing the urgency of having leaders respond with the responsibility for leaders to be authentic and accurate rather than just offering well-intentioned platitudes. Therefore, balancing urgency with the need to get things right can be a challenge. Additionally, maintaining the right pace of change and highlighting the less visible work to keep associates engaged and informed is also challenging.

For WFF, being rooted in the middle of the country with offices in Washington, D.C., Jersey City, and Denver, there is a broad spectrum of ideas and perspectives within the Foundation that go beyond geographic or other ideologies. This can be both an advantage and a challenge for the Foundation as it strives to reflect everyone within the Foundation. ■

Winthrop Rockefeller Foundation



Mission: To relentlessly pursue economic, educational, social, ethnic, and racial equity for all Arkansans.

“WRF’s theory of change requires that Arkansans see themselves and their neighbors as worthy of jobs or entrepreneurial opportunities that provide a livable wage, a high-quality education, and the chance to thrive and prosper in their chosen communities. To that end, our narrative and communications strategy is about telling new, TRUE stories of not only how hard Arkansans work, but also of the systems that hinder progress and inequitably distribute access and opportunity. The truth cuts both ways but will lead us to the common goal of rebuilding systems that work for all Arkansans.”

- **Sherece Y. West-Scantlebury**, Ph.D., CEO

Communicating internally about racial equity and inclusion

WRF’s mission is to relentlessly pursue economic, educational, social, ethnic, and racial equity for all Arkansans. WRF adopted this new mission and created its strategic plan, AR Equity 2025 at the end of 2019. Over the past year, WRF has been working on its organizational brand and identity to further solidify what it means to be an equity funder, particularly given the challenges that Covid-19 presented to local nonprofits and philanthropy. To help with this cultural and organizational development, WRF worked with local and national knowledge experts to broaden their organizational pursuit of equity. Internal discussions have also focused on how the Foundation can lead on equity issues within the state, region, and philanthropy. The Foundation has focused on ensuring there is alignment internally around its identity as a Foundation as well as the identity of staff as individual equity leaders within the organization.

Communicating externally about racial equity and inclusion

As part of their [AR Equity 2025](#) strategic plan, the Foundations has three bold goals around economic equity, educational equity, and social, ethnic, and racial equity and views these as interrelated and intersectional equity goals. As a result, all of its investments, programming, and work is directed towards these goals. In getting to this strategic focus, WRF engaged in intentional conversations with communities, grantees, and stakeholders to understand the needs of the community.

At the beginning of 2020, when the pandemic hit, WRF realized that it was not possible to talk about racial equity without addressing economic equity. As a result, the Foundation focused on communicating how economic inequity manifests in Arkansas and which populations experience economic inequity at disproportionate rates. To that end, WRF released the [ALICE](#) (Asset Limited, Income Constrained) in Arkansas report. ALICE is a grassroots movement that is seeking to change the narrative about poverty in America. The Foundation joined 20 other states who have done similar research. The research revealed that over 41% of Arkansas’ population is struggling to make ends meet and while Black,

Latinx, Indigenous, and white populations all experience poverty, financial inequity disproportionately impacts people of color. Many people of color were also left out of conversations around receiving financial aid, CARES Act funding, and COVID relief. To address these issues, WRF focused on investments to advance the conversation around capital access. The Foundation was able to strategically partner with Community Development Financial Institutions (CDFIs) in the state recognizing that at the core of racial inequity is economic inequity.

WRF has also engaged in research and data collection to guide its communication strategy and responses to the pandemic. The Foundation worked with other partners to develop a report on the business case for equity and understanding how much the state is losing due to a lack of equitable approaches. This study will be released soon. The Foundation has also examined how the pandemic has impacted access to capital for small businesses by race and region. WRF plans to make investments and speak more publicly about local entrepreneurship and the entrepreneurial ecosystem, given that the research demonstrates that many minority-owned businesses have been unable to access capital, particularly during the pandemic. Given that it is often the entrepreneurial ecosystem that has allowed families to stay afloat when the economy has continued to fail them, WRF is thinking strategically about their communication around who is locked out and unable to receive resources. They are planning to do more external communication about their findings and what they have learned both from their grantees and partners.

Key challenges and factors that have contributed to WRF's progress in communicating about racial equity and inclusion

As a result of its Equity 2025 strategic planning process, which included both internal and

external conversations, WRF was well-positioned to respond to the pandemic and racial uprisings and how this was impacting people of color. The intensive process they went through in developing their strategic plan before the start of 2020 primed them to not only be responsive but to speak more clearly about the issues.

WRF has also been fortunate to have within their network a variety of resources in terms of communication firms and diversity, equity, and inclusion (DEI) consultants who have helped to challenge and support the Foundation in the way it approaches its communication. For example, the Foundation had a communication and equity professional conduct a training with staff around what it means to use an asset frame. By using an asset frame the Foundation has been able to humanize those most impacted by systemic issues while also clearly highlighting the root causes of inequities.

One of the challenges that WRF has faced in communicating about racial equity is finding the right balance in its messaging, given that it is a Black-led organization in a politically conservative southern state. As an organization that funds policy and systems change the messages it communicates can often run counter to political thought and opinion in the state. However, to make progress and shift policy WRF has to communicate issues in a way that is accessible to a broad swath of people, including decision-makers, policymakers, and business leaders. The ALICE framework has been particularly helpful in this regard. With the report finding that over 41% of the population is struggling to make ends, regardless of their race or where they live in the state, people have been able to see themselves in the ALICE framework. As a result, it has provided an opportunity for a dialogue that might typically be viewed as uncomfortable or controversial.

Another challenge that WRF has faced in communicating about racial equity and inclusion

is that as a smaller foundation, it often does not have the capacity to undertake the vast amount of communications work that is required to create change. However, being part of networks, such as REPG, has enabled WRF to leverage examples and resources from other

larger foundations to accomplish more than it could on its own. ■

V. Common Themes

Foundations within REPG are on a continuum in their racial equity and communications work. Some are at the beginning of their journey while others are more advanced, though they recognize that the journey never ends. The profiles of these eight foundations

highlight valuable strategies and lessons on communicating their racial equity and DEI policies, practices and perspectives, programmatically and institutionally. Several themes emerge from their experiences:

1. *Foundations enter this work from different starting points.*

Where a foundation starts its journey of communicating its racial equity values varies. For some, it begins internally, driven by staff or leaders while for others it begins as a result of external forces. Some foundations are driven by the recognition that to be a leader in this arena and push for racial equity externally they must communicate and reflect these same values internally. Others begin with a focus on grantees and other partners, which leads to a recognition of the need to be aligned internally. Where a foundation starts on its equity journey

does not matter. A bigger challenge for many foundations is determining when and how to communicate its values both internally and externally while the work is still in progress. For many foundations, publicly sharing demographic data about its staff and board is a way to begin communicating its commitment to track progress and provide transparency.

2. *Internal communication is a significant challenge.*

Foundations recognize that the personal experiences of staff around race are varied and conversations that center race are often difficult as they require acknowledging power dynamics, privilege, and one's role in structural racism. Even within more diverse foundations, lived experiences among staff can be vastly different. Additionally, for many foundations, ideological differences both internally and externally impact how a foundation communicates about racial equity. Foundations work hard to find the right balance in their messaging and devote

significant time and effort to creating a shared language and understanding about racial equity and inclusion. Providing safe spaces for ongoing staff discussion and engagement on these issues, as well as systematically bringing new staff on the journey through onboarding processes that reinforce this shared language and understanding, is also critical.

3. *Community input is a critical part of external communications.*

Many foundations engage their community partners in conversations before revising their mission statements and in ongoing ways as they shape their strategy and programming. Through listening sessions with grantees as well as in community conversations, foundations can learn from those most impacted about where needs are greatest.

Conversations must be structured to promote bi-directional communications. This type of engagement can establish new conversations that can lead to greater power-sharing, where foundations share decision-making power over who receives capital with communities that are most impacted and co-create strategies with stakeholders.

4. *Several common factors lead to success in communications efforts.*

There is no "one size fits all" strategy that must be used by all foundations to communicate their equity values. However, several strategies are apparent across all foundations interviewed. These include having an explicit commitment to racial equity and DEI from the organization's leadership; using data and

narratives to illuminate the work and to help tell the story of what is happening; and promoting organizational transparency about efforts and activities.

5. *Consultants and peers are invaluable resources.*

Foundations communicate their equity values through a myriad of strategies. It is evident that they make extensive use of consultants and trainers to help with these efforts. This is particularly true as foundations engage in internal conversations with staff around racial equity and inclusion. Consultants can create neutral environments where staff feel safe to share their perspectives and also provide knowledge, tools, and skill-building for staff to continue the work. Most importantly, they can help to create internal alignment to ensure the ability of staff to communicate a consistent and cohesive message. Additionally, foundations

have the incredible opportunity to learn from each other, to use tools that have already been developed, and to share their specific resources and talents with peers. Some smaller foundations may not have the organizational capacity to undertake the vast amount of communications work required to create the changes desired. However, being able to learn from peers, such as through REPG, and access resources and tools developed by other foundations can help in overcoming internal capacity challenges.

6. *Foundations' communications efforts have a cascading effect.*

Leadership plays a critical role in communicating a foundation's commitment to racial equity and inclusion and establishing buy-in. Having the support of the CEO and senior leadership allows staff to move the work further internally and ensure that the articulated values are embedded throughout the foundation. Additionally, by clearly communicating the foundations' values and commitment to racial equity to grantees, donors, contractors, and investment fund managers, foundations help their partners to understand, embrace and

communicate these values to others. Many foundations develop communication resource guides and provide technical assistance to their grantees and partners to help them build their capacity around racial equity and DEI. In doing so they are ensuring more effective communication around racial equity by building these competencies in their partners.

VI. Conclusion

While 2020 was a year of profound upheaval and change and revealed for some the depth of racial inequities that have always existed, many REPG foundations had already begun the work of revising their mission statements and values to reflect a commitment to racial equity and inclusion before 2020. The internal work they undertook to create those changes enabled them to have the clarity and internal alignment to communicate effectively about these issues when the pandemic and racial uprisings began.

For other foundations, the centrality of racial equity and inclusion to the mission of philanthropy was further illuminated through the events of 2020 and provided the urgency and impetus for many to push for a revision of values and the creation of internal structures to communicate and advance racial equity and inclusion within every facet of the foundation. However, 2020 also revealed the extent to which people are unwilling to confront and discuss racism reflecting that people are at very different stages in their learning journey. Given the complexity of discussing race and the importance of self-reflection and learning, having internal racial equity discussions broadly distributed and embedded throughout the foundation among all staff is critical. Equity change is often driven by senior leadership and boards but requires participation by staff at all levels.

In terms of external communications, engaging in dialogue with other foundations and sharing strategies provides transparency and accountability around institutional values as well as opportunities for collaboration. As the world continues to experience seismic changes related to the intersection of public

health pandemics, climate change, and growing racial inequities foundations are being forced to respond more urgently and to go deeper in communicating the structural roots of these problems and the systemic change that is required. At the same time while the country experienced a racial reckoning in 2020, in 2021 we are seeing heightened polarization and growing opposition to attempts to advance racial equity and racial justice. This is apparent for example in the education field with the resistance to “Critical Race Theory”, and most recently, in the philanthropic field with emerging resistance to what is deemed “woke philanthropy” and efforts to address systemic racism. The role of foundations and how they wield communication as a strategy is particularly important in this regard. Foundations can play a critical role in addressing these challenges in their communications both internally and externally. By being willing to speak out on these issues and helping to craft the type of messages that convey the widespread benefits of equity and racial equity, foundations can challenge arguments that portray racial equity as a zero-sum game. In this way, foundations can help to change the broader narrative.

As foundations continue to address these issues and grapple with their power and privilege, peer learning through networks such as REPG can provide a vehicle for both institutional change and collective action in the field. ■

About REPG

Marga's Race and Equity in Philanthropy Group (REPG), created in 2006, brings together foundations that are committed to improving their ability to effectively promote racial equity and inclusion in their policies, systems, and practices. Through peer learning, member foundations are able to incorporate new ideas and practices into their institutional efforts, which can lead to transformative change.