

REPG

The Race & Equity in Philanthropy Group

Learning Exchange Framework

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Learning Exchange and Discussion

Race & Equity in Philanthropy Group

Facilitated by



The Race & Equity in Philanthropy Group (REPG)

Learning Exchange Framework

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Introduction

This Learning Exchange Framework helps groups of foundation representatives share policies, practices, lessons, and ideas on racial equity and inclusion with each other. This learning is intended to help participants bring new concepts back to their foundations in order to help these institutions develop or refine their systems and operations regarding racial equity and inclusion. Therefore, this learning exchange method is both an opportunity for peer learning and support as well as a pathway to institutional change in philanthropy. It is ultimately intended to strengthen the capacity of foundations to be racially equitable and inclusive in all of their aspects internally and externally – how they hire, promote, make decisions, collect data, evaluate along with how they communicate, engage, and give.

The COVID-19 pandemic has further illuminated the significance of racial equity and all aspects of equity in our society. The growing racial justice movement, influenced by widespread outrage over numerous acts of police violence and murder against Black people, and mass protests have already led to numerous symbolic and policy changes, and have challenged every sector to re-examine their role in systemic racism. Philanthropy is no exception. Many foundations have pledged support, redirected funds, and made statements on racial justice and racial equity.

In many ways, current conditions and their influence on the years to come, demonstrate a call to action for philanthropy around a much longer term and more substantial reimagination. As we have begun to see greater attention to racial equity, and diversity, equity, and inclusion (DEI) in philanthropy in recent years, the importance of this trajectory is simply underscored in our emerging new reality. Many foundations have been responding to a public health and economic crisis along with dramatically increased attention to racial justice through their giving and advocacy.

While there has been a growth in the number of racial equity trainings and new initiatives that foundations have launched in response to this new reality there is still a great deal of work to do in refining and reflecting a true commitment both externally and internally. The Learning Exchange Framework can help foundations move the work beyond trainings to transforming policies and practices and can influence sustained systemic changes that lead to more diverse, equitable, and inclusive foundations in the long run. In a mutually beneficial learning space foundations have the opportunity to hear from peers and identify new practices as well as to collectively troubleshoot challenges in a supportive community.

This framework is intentionally adaptable to the priorities foundations representatives wish to address. The idea of foundations as civic actors in response to current events is among the many considerations regarding racial equity and inclusion. Therefore, this learning exchange method can be adapted to discussion on:

- How foundations are responding due to the pandemic and the growing racial justice movement;
- How they are prioritizing racial equity and inclusion in their responses;
- How they are planning their future work on racial equity and inclusion given how the pandemic has deepened existing inequities, and the call to action presented by the racial justice movement.

Additionally, while this learning exchange method was originally designed to be implemented in person, we are able to organize all sessions virtually.

This document includes background on foundations and racial equity and DEI. It also includes an overview of the Race and Equity in Philanthropy Group as well as some lessons learned from many years of evolving understanding on these issues. These pages also include an overview of the learning exchange method and a framework for a series of conversations.

Considering the role of Foundations in Racial Equity and DEI

Many foundations and Philanthropy Serving Organizations (PSO's) are asking questions about how to address various dimensions of inequality. Persistent racial inequities and resistance to racial progress have left many wondering what to do. In the field of philanthropy, substantially increased inquiry about these concerns has led to new initiatives, programs, and discussions. Ultimately, the field of philanthropy will have to change to meet the great challenges of entrenched inequities. This level of change will have to be evident in how foundations are structured and designed. It will have to be reflected in how foundations make decisions and distribute resources. The Race and Equity in Philanthropy Group (REPG) has been grappling with these matters for many years. In this document, REPG presents a new framework, which is designed to assist foundation representatives in discussing policies and practices regarding racial equity and DEI. REPG's approach to learning exchange is not only an avenue to greater dialogue among foundations, but an engine toward actual change in foundations. REPG hopes that this learning exchange framework will be a useful way to organize intentional and focused sharing among foundations, which can lead to mutual awareness and transformation.

About REPG

Formed in 2006, REPG provides a forum for learning exchange among a core group of member foundations on policies and practices related to racial equity and various aspects of DEI. Current members of REPG include: the Annie E. Casey Foundation, the East Bay Community Foundation, the Ewing Marion Kauffman Foundation, the Ford Foundation, the James Irvine Foundation, the Lumina Foundation, The California Endowment, the California Wellness Foundation, the San Francisco Foundation, the Seattle Foundation, the Walton Family, Foundation, W.K. Kellogg Foundation, and the Winthrop Rockefeller Foundation. REPG also collaborates with select national Philanthropy Serving Organizations (PSO's) in its learning, including the Association of Black Foundation Executives (ABFE) and Change Philanthropy.

REPG began as a result of a study conducted by Marga Incorporated of how various foundations were addressing these issues. The study was commissioned by the Annie E. Casey Foundation's (AECF) RESPECT group in 2002. RESPECT, a working group across the foundation, wanted to understand how various foundations were implementing policies and practices on these matters in order to provide AECF's leadership specific lessons that might be applied at their foundation. Given that foundations learn well from peer institutions, the RESPECT group believed that change in their foundation could be facilitated with a greater understanding of specific ways in which other philanthropic institutions have been prioritizing racial equity, diversity, and inclusion.

Thirty foundations from across the United States were interviewed for the study. During these interviews, many foundation representatives expressed their own interest in learning from the policies and practices of peer institutions. They felt that sharing what other foundations were doing would bolster the case they could make to their Boards and others in their organizations. Responding to this request, AECF and Marga Inc. organized focus groups on the East and West Coast. During these focus groups, participants expressed a desire for a permanent table for periodic learning exchange among foundation representatives. Foundations participating in the group could be of various types (private foundations, family foundations, community foundations, etc.).

The foundations around the table would be represented by true champions for advancing a commitment to these issues in their institutions. These could be CEOs, Program Officers, HR officers, VP's of Program, Evaluators, CFOs, and beyond. The point was to convene those who had a demonstrated interest in, not only discussing the issues, but influencing change in their institutions. As these issues were not as widely discussed in philanthropy as they are today, there was a particular need to reduce isolation among these champions, who may have been the lone voice pushing for change in their foundations.

Occasional learning exchanges would be significant events that would provide these champions with case studies, examples, and policies that they could bring back to their institutions in order to be more persuasive internally. Consequently, REPG was formed, with the intent of leveraging peer learning in order to advance institutional change in specific foundations. This change would create exemplary foundations positioned to lead, and help philanthropy as a field transition from theory to practice. It is one thing to express a commitment to racial equity, and DEI. It is another to demonstrate how this commitment can be manifested in policies, practices, systems, and operations. REPG emphasizes a comprehensive commitment, transcending grant making, as a true commitment is reflected in all facets of an institution.

Note that, while REPG created a space for discussion about numerous concerns regarding systems of inequity, the group chose to lead with race in its name. At the time, conversations about race in foundations were particularly challenging. Many observed a tendency for race to fall off of the agenda during discussions of diversity despite its great significance to many of the kinds of issues addressed in philanthropic programming (health, education, poverty, sustainability, etc.). Additionally, REPG decided to focus comprehensively, beyond grantmaking. In many cases, these issues were being relegated to a single grantmaking portfolio rather than how the entire foundation operates and makes decisions. Racial equity and DEI are relevant to every facet of a foundation. Therefore, REPG emphasized broad policies and practices in multiple categories.

Marga Incorporated was asked to manage REPG, organize and facilitate meetings among its core group of members, and help draw lessons from these exchanges to influence the broader philanthropic field (through publications, panel presentations, and collaboration). Currently, REPG's core group of members meet twice per year – once in California and once in another part of the U.S., though these discussions have been held virtually since the onset of the pandemic. Discussions during these meetings address a wide range of policies and practices relevant to foundations. The content of these discussions focuses on race as well as numerous other aspects of equity and inclusion and intersectionality.

Race and Equity in Philanthropy and Lessons Learned

Since REPG's founding, attention to racial equity and DEI in philanthropy has significantly increased. Within many changes, REPG has continued to emphasize the importance of transforming foundation practice. The degree of discussion about racial equity and DEI has continued to grow at philanthropic conferences and in other spaces in which foundations gather and communicate. Numerous organizations specifically addressing these issues have increased. Many existing associations in philanthropy have created programs and initiatives specifically on some aspect of racial equity or DEI. Many more authors have been writing on matters of equity and inclusion in philanthropy. Current events have influenced substantial widespread discussions and actions in philanthropy on racial equity in particular.

REPG has particularly witnessed an increased interest among foundations that want to re-assess how they have been conceptualizing and addressing these issues. This has led to a growth in REPG's core membership, but also a realization that REPG's learning exchange method has to be designed to reach a broader constituency of foundations. REPG has always aimed to influence both its core foundation members as well as the wider philanthropic field. However, the times called for a more intentional effort to bring the learning exchange framework to a broader population.

REPG has learned a great deal since its founding, having transcended a very eventful timespan in the U.S. and world as well as in philanthropy as a field. Throughout this period, REPG has never wavered regarding the importance of transforming the policies and practices of specific foundations, and showcasing learning from those experiences. In many ways, REPG member foundations have made a commitment to becoming exemplars. While much conversation takes place throughout the philanthropic field, REPG is always aware that change is not real until it is practiced. There is still much work to be done in philanthropy, but REPG has certainly learned more about what it takes to create foundations that are racially equitable, diverse, inclusive, and equitable more broadly. For example, REPG has learned through experience that, in order for foundations to demonstrate a commitment to racial equity and DEI, it is important for them to:

- ▶ Develop an authorizing environment at levels of leadership (Board, President, senior leaders);
- ▶ Integrate a commitment into the foundation's values explicitly;
- ▶ Engage the entire foundation in continuous communication around the significance of racial equity and DEI;
- ▶ Incorporate a commitment into the foundation's core strategy, policies, practices, and programs;
- ▶ Treat a commitment to racial equity and DEI as a long term commitment for the foundation;
- ▶ Recognize the different strategies and approaches required for varying types of foundations (i.e. the role of donors in community foundations);
- ▶ Acknowledge other factors such as the varying levels of understanding or experience with these issues, and the role of different cultural contexts;
- ▶ Ensure attention to intersections across multiple identities.

With the ongoing evolution of thinking, dialogue, and practice with respect to racial equity and DEI in philanthropy, REPG will continue to learn and share lessons. REPG has begun to develop a topical series that will highlight case examples of the experiences of REPG members on a range of policies and practices. The first paper in the series addresses institutional strategies, the second will focus on communications, and the third will discuss data, evaluation, and learning.

REPG's Learning Exchange Method

REPG has been convening representatives of foundations to exchange ideas, lessons, policies, and practices¹ on racial equity and inclusion in philanthropy. The learning exchange method has been equipping an ongoing core group of participants with concrete practices from peers that they can bring back to their foundations. In these facilitated discussions, participants in REPG have been able to receive guidance and feedback from peers on their institutional policies and practices on racial equity and inclusion. The method leverages peer exchange to enable concrete and practical changes and improvements in foundations. The REPG approach strengthens the capacity of participants to champion racially equitable and inclusive policies and practices in their foundations.

Over REPG's history, member foundations, through experiencing in person learning exchanges, have been able to bring lessons back to their foundations to influence the development of new policies and practices. For example, numerous REPG member foundations developed similar systems for demographic data collection as a result of sharing ideas with each other during learning exchanges. Member foundations have also developed relationships with each other, and collaborated on similar topics and presented together at various philanthropic conferences.

¹ Some of the types of policies and practices that have been discussed in REPG learning exchanges have been how to integrate racial equity and inclusion into institutional strategic plans, how to develop and maintain demographic data collection practices, how to cultivate a commitment to racial equity and inclusion at the Board level, how to develop and maintain internal learning and discussion groups on racial equity and inclusion in foundations, how to develop pathways to diversify staff (as well as consultants, vendors, investment officers, and others) in foundations, and more.

Indeed, the intent of the forum that REPG has created has been to design a space for mutual learning that actually leads to institutional change. As peer learning remains an essential way in which foundations listen and adopt new approaches, REPG harnesses its potential as a transformative tool. This is the spirit that led REPG to create a format for learning exchange that can far transcend the foundations in REPG's core membership. This document intends to assist clusters of foundation representatives, with REPG's direct guidance, in developing focused learning exchanges on racial equity and DEI.

A Framework for Learning Exchange

REPG has been exploring ways to bring this learning exchange approach to various clusters of foundation representatives through collaboration with existing associations in philanthropy. REPG collaborated with a few Philanthropy Serving Organizations (PSOs) in order to inform the development of this framework that could be useful to groups of foundations beyond REPG's core membership. Based on findings from these pilot explorations, the learning exchanges will be structured as a series of three discussions, which can take place *virtually*. Prior to the first discussion a survey will be shared with participants to identify the key issues that their foundations are grappling with. This survey would help lay the groundwork for the first discussion as well as inform the topic and thought questions for the subsequent two discussions. However, the subsequent topics of discussion can also be determined based on the themes that emerge during the learning exchange and feedback from participants. A guest speaker from REPG's core group is always included in the first learning exchange but can also be included in subsequent discussions as needed. Draft agendas for the three learning exchanges are included below. Note that these agendas can be customized to particular interests and contexts and can be structured in different ways based on the needs of the group. For example, with a larger group, breakout sessions can be incorporated to allow for deeper discussions. This framework does not intend to be overly prescriptive. It is essential that the discussions influenced by this framework address priorities facing participating foundation

representatives. As such, the agendas can be tailored accordingly. A preparation phase is included in order to assist in shaping and tailoring the content of the learning exchanges.

Preparation

Due to the complexity of these issues and the various dynamics associated with initiating and advancing change in policy, practice, and institutional culture, learning exchanges on these matters are best situated in a series. We recommend keeping roughly the same participants together for a series of three learning exchanges.

If a PSO or an informal group of foundations wishes to hold a series of conversations on racial equity and inclusion in foundations, we suggest identifying a group of foundation representatives, who are willing to commit to participating in a series of at least three learning exchanges.

We also suggest learning some information about those who agree to participate before beginning the first session. Some questions that could provide useful insights in advance include:

- Overall, how would you characterize the way in which your foundation addresses racial equity and inclusion?
- Would you say the foundation is just beginning to address these issues in policy and practice or more advanced?
- What would you say are the top three barriers to your foundation developing and maintaining effective policies and practices on racial equity and inclusion?
- What would you like to learn from peers in order help your foundation overcome these barriers?
- What is one racial equity/DEI question that you are grappling with that you would like to see addressed in the first learning exchange in the series?
- How has your foundation been addressing racial equity and DEI given emerging dynamics due to the COVID-19 pandemic?¹

¹ Note that matters directly related to the pandemic, the growing racial justice movement, and other significant current events can be incorporated into all discussions. As the framework is designed for a series, it is intended to surface the most significant issues in the first session in order to inform content for discussion in subsequent sessions.

- How can your foundation develop authentic and long term commitments to racial equity?
- How can foundations better collaborate in order to address significant societal issues that no single foundation can demonstrably impact alone.

The Race & Equity in Philanthropy Group (REPG)

Learning Exchange and Discussion -- Part I

Goals:

- To convene foundation representatives to discuss how their institutions incorporate a commitment to racial equity and Diversity, Equity, and Inclusion (DEI) into their core overall strategic priorities;
- To expose foundation representatives to the REPG learning exchange approach and identify a topic for subsequent discussions;
- To hear how an existing REPG member has been incorporating racial equity and DEI into his/her institution's policies and practices;
- To launch a series of learning exchanges starting broadly and identifying common challenges to discuss further.

Agenda:

9:00 am Introductions and Overview

9:05 am About REPG and the Evolution of Racial Equity and DEI in Philanthropy

9:15 am An REPG Member's Point of View – (An REPG member will discuss how his/her Foundation has been integrating a commitment to racial equity and DEI into its overall programmatic and institutional strategy, and the value of peer learning exchange in facilitating institutional change in foundations).

9:30 am Learning Exchange: Strategically Prioritizing Racial Equity and Inclusion (Each meeting participant will share how her/his foundation incorporates a commitment to racial equity and DEI into its core strategy. Each foundation will also submit a slide in advance of the meeting in response to the thought questions. The group will discuss each participant's story).

- *How is your foundation integrating a commitment to racial equity and DEI into its core strategic priorities (programmatically and institutionally)?*
- *What factors are contributing to your success or creating challenges in doing so?*
- *How does your foundation intend to deepen its commitment to racial equity and DEI in its overall strategic priorities?*
- *What information or guidance do you need in order to enhance your success in this regard?*

10:30 am Break

11:00 am Learning Exchange Continued

11:30 am Summary of Common and Relevant Ideas

- What are some of the major themes that emerged from today's discussion?
- Based on learning from today's discussion and insight provided in advance of the meeting, what would be a useful topic to address in the next meeting in this series?

12:00 pm Next Steps

- Based on learning from today's discussion, what will you attempt to apply at your foundation?

12:30 pm Adjourn

The Race & Equity in Philanthropy Group (REPG) Learning Exchange and Discussion -- Part II

Goals:

- To convene foundation representatives to discuss how their foundations have been addressing racial equity and inclusion related to the identified topic;
- To reflect upon the prior learning exchange and any efforts made to apply lessons from that discussion in one's foundation;
- To identify lessons and practices regarding the topic of this learning exchange that might be applied at the various foundations represented.

Agenda:

9:00 am Welcome and Introductions

9:10 am Follow-up on Next Steps from 1st Learning Exchange (Based on what was shared at the last meeting regarding next steps, participants will be invited to share any changes they have attempted to apply at their foundation or to share what has not happened recognizing that pace and dynamics vary at each institution).

9:30 am Learning Exchange: Topic (e.g. Boards, internal culture etc.) (Each meeting participant will share answers to thought questions on the specific topic of this meeting. Each foundation will also submit a slide in advance of the meeting in response to the thought questions).

- *How is your foundation addressing racial equity and DEI regarding **discussion topic** (programmatically and institutionally)?*
- *What factors are contributing to your success or creating challenges in doing so?*
- *How does your foundation intend to deepen its commitment to racial equity and DEI regarding **discussion topic**?*
- *What information or guidance do you need in order to enhance your success in this regard?*
- *What one key question are you grappling with as it relates to **discussion topic**?*

10:30 am Break

11:00 am Learning Exchange Continued

11:30 am Summary of Common and Relevant Ideas

12:00 pm Next Steps

- Based on learning from today's discussion, what will you attempt to apply at your foundation?

12:30 pm Adjourn

The Race & Equity in Philanthropy Group (REPG)

Learning Exchange and Discussion -- Part III

Goals:

- To convene foundation representatives and continue a discussion about how foundations have been addressing racial equity and inclusion related to the identified topic;
- To reflect upon the prior learning exchange and any efforts made to apply lessons from that discussion in one's foundation;
- To identify lessons and practices regarding the topic of this learning exchange that might be applied at the various foundations represented;
- To identify and share resources or tools that have been (or would be) helpful.

Agenda:

9:00 am Welcome and Introductions

9:10 am Follow-up on Next Steps from 2nd Learning Exchange (Based on what was shared at the previous meeting regarding next steps, participants will be invited to share any changes they have attempted to apply at their foundation or to share what has not happened recognizing that pace and dynamics vary at each institution).

9:30 am Learning Exchange: Topic (e.g. communications, data, evaluation and learning, etc.) (Each meeting participant will share answers to the thought questions. In advance of the meeting each participant will also submit a slide in response to the thought questions and highlight one tool or resource they have found helpful related to the topic).

- *How is your foundation addressing racial equity and DEI regarding **discussion topic** (programmatically and institutionally)?*
- *What factors are contributing to your success or creating challenges in doing so?*
- *How does your foundation intend to deepen its commitment to racial equity and DEI regarding **discussion topic**?*
- *What information or guidance do you need in order to enhance your success in this regard?*
- *What one key question are you grappling with as it relates to **discussion topic**?*



10:30 am Break

11:00 am Learning Exchange Continued

11:30 am Summary of Common and Relevant Ideas

12:00 pm Next Steps and Sharing of Resources/Tools

12:30 pm Adjourn

Conclusion

REPG looks forward to communication with various Philanthropy Serving Organizations and philanthropic formations about how to best customize a series of learning exchanges given existing needs and context. As philanthropy is at a pivotal point in its history as a field, REPG hopes that this framework can help foundations identify practical ways to revise their priorities, systems, and operations with peer support. The learning exchanges that will be guided by this framework should increase an understanding of the various factors to consider on the journey toward institutional transformation. Hopefully, it will help to facilitate concrete improvements in how foundations address some of the most pressing issues of our times.