LESSONS LEARNED IN ADDRESSING RACIAL EQUITY IN FOUNDATIONS
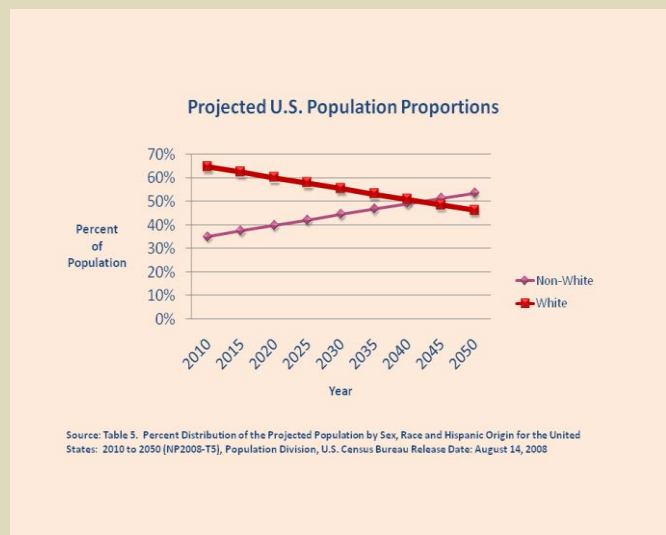
May 2009

Diversity

Philanthropy

REPG

BACKGROUND
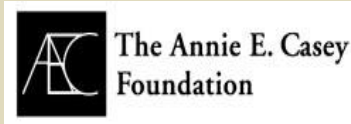
This paper emerges out of a partnership between the Diversity in Philanthropy Project and the Race and Equity in Philanthropy Group. Both efforts emerged in the context of a growing discussion around the demographic distribution of philanthropic dollars. The Diversity in Philanthropy Project has mobilized the leadership of numerous major foundations to make diversity of all types a greater priority for the industry. The Diversity in Philanthropy Project hopes to institutionalize its philosophy by enhancing the capacity of key agencies, including the Council on Foundations, to promote diversity.

The Race and Equity in Philanthropy Group (REPG) gradually became a learning exchange of a few member foundations designed to transform internal systems in philanthropic institutions in order to increase the spread of dollars to communities of color. One aspect of the Diversity in Philanthropy Project's approach is to highlight case studies of foundations' successes in incorporating various dimensions of diversity into their strategies and programs.

Since the REPG focuses its efforts on strengthening the ability of its member foundations to implement practices that address racial equity, the Diversity in Philanthropy Project wondered about the lessons that REPG member foundations have learned from their recent attempts to enhance their capacity to improve communities of color. Additionally, since the Diversity in Philanthropy Project's focus includes multiple types of diversity, there was also a desire to learn how REPG member foundations' efforts emphasizing race can influence approaches to other demographic groups.

RATIONALE

Increasing racial and ethnic diversity and the impending tip of the minority population to a majority in the United States (see graph below) have encouraged localities, regions, States, and the Nation as a whole to look more closely at the significance of race to social issues of all types. We can see immigrant populations entering communities, seeking opportunity and facing challenges in their income, health, housing, and overall adaptability to a new society. Longstanding African American communities have made some significant advances, but have continued to disproportionately occupy the lower rungs of

Projected U.S. Population Proportions

Source: Table 5. Percent Distribution of the Projected Population by Sex, Race and Hispanic Origin for the United States: 2010 to 2050 (NP2008-T5), Population Division, U.S. Census Bureau Release Date: August 14, 2008

many social indicators.

While the diversification of the United States has spawned interactions across multiple identities and backgrounds, we can see that distinctions by race and ethnicity transcend difference alone, and continue to be characterized by inequities -- notable disparities in most of the issue areas common to philanthropic programming. Additionally, inequality in nations throughout the

world tends to take on ethnic and racial dimensions. In order to fully comprehend inequality, it is important to understand the role and dynamics of race and ethnicity.

Race and ethnicity have often been viewed as particular rather than universal in philanthropy, or assumed to be so deeply embedded in broader frameworks (i.e. poverty) to not warrant discussion at all. In order for philanthropic institutions to adequately fulfill missions to improve social conditions, racial equity should be viewed as an integral contributing goal toward whichever program issue is in question. Additionally, when race and ethnicity are not explicitly analyzed and discussed, racial equity is often not addressed. Racial equity is not achieved automatically; it requires deliberate action. If the most pressing social concerns to philanthropy tend to be characterized by racial and ethnic inequality, then these concerns will not be sufficiently addressed without some purposeful capacity to incorporate racial equity into broader philanthropic agendas.

These ideas contributed to the spirit in which the REPG was formed. The foundation community is hardly of one mind on these issues, but data on disparities paint the picture of racial inequality across issue areas. The REPG hopes its efforts can not only enhance dialogue around the significance of racial equity to philanthropic pursuits, but build the systemic capacity of foundations to effectively make some dent in persistent inequalities that have presented challenges to foundation programs and initiatives for decades. As the philanthropic industry has embraced the need for clear strategies and demonstrable results, it is more important than ever to integrate the pursuit of racial equity into foundation programs. The potential of such programs to noticeably reduce

critical gaps in economics, education, health, safety, employment, air quality, and any number of issues, will be greater when an analysis of the role of race and ethnicity is taken into account and addressed.

METHOD

Marga Incorporated, which coordinates the REPG, asked member foundations (the Annie E. Casey Foundation, the W.K. Kellogg Foundation, The Atlantic Philanthropies, and The San Francisco Foundation) to reflect on the lessons they have learned from attempting to strengthen approaches to racial equity. They were also engaged around the ways in which efforts focusing on race have influenced strategies targeting other demographic groups and foundation programs in general. Findings from these discussions are reflected in this paper.

The purpose of this paper is not to review the details of the work plans and progress of REPG's member foundations, as this information is well documented in *Volumes I*[1] and *II*[2] of *Profiles in Foundation Giving to Communities of Color*. The content of this document takes the opportunity to reflect on the learning from the experiences of REPG members regarding what it takes to effectively incorporate racial equity into foundation priorities and systems and how these efforts are critical to other aspects of diversity and philanthropy in general.

[1]
Race and Equity in Philanthropy Group. (2007, April). *Profiles in Foundation Giving to Communities of Color*. New York: Marga Incorporated.

[2] Race and Equity in Philanthropy Group. (2008, May) *Volume II: Profiles in Foundation Giving to Communities of Color.* New York: Marga Incorporated.

THE RACE AND EQUITY PHILANTHROPY GROUP

Dialogue, research, and advocacy pertaining to the demographic distribution of philanthropic dollars, especially regarding race, are not new. When a number of foundation representatives were convened by the Annie E. Casey Foundation in 2005 to discuss a range of concerns related to equity and diversity in philanthropy, a few needs became clear. First of all, there was a desire to create an ongoing forum through which particular foundations could exchange ideas and stories about how they have addressed race in their respective institutions. In particular, the foundations wanted to emphasize the practical implementation of strategies, programs, and systems (rather than theory). Secondly, the foundations stressed the need to focus specifically on race and the centrality of racial equity to equity in general. The foundations had experienced particular internal tension and barriers regarding the issue of race despite the long history of movements and programs that have explicitly led with race.

Numerous foundations passed through the REPG over the last few years in addition to its current members. Membership remains small in the REPG because joining the group is a significant commitment. Foundations that join the REPG make a commitment to become an exemplary institution in the willingness to continue to improve, the development of strategies and programs, and the strengthening of internal systems.

The REPG meets four times per year. The representatives attending these meetings do not share the same role in their respective institutions, but they are all able to influence their institutions in some capacity. They have in common the role of *change agent*. The Annie E. Casey Foundation/Marga Incorporated study released in 2005 revealed that while foundations varied dramatically in their approaches to race and diversity, they all had people inside who were emphasizing race and/or diversity. These people are the change agents who push for dialogue, and often go against the current in order to help their institutions see the value of focusing on race.

Subsequently, the REPG has become a forum for change agents. Learning exchanges in the REPG enhance the ability of these change agents to alter and enhance their foundations. In REPG meetings, change agents, as representatives of member foundations share stories on the progress of systemic change in their institutions and offer guidance. Progress is measured against individualized institutional work plans that have been developed through REPG. As this report indicates, both the capacity of change agents to influence their institutions and the internal systems to increase dollars to communities of color in their institutions have been enhanced through the REPG.

Each REPG member foundation and each REPG change agent have distinct stories and experiences; however, continuous learning exchanges have created a more uniform sense of what it takes to transform the institutional capability of foundations to concretely expand access and opportunity for communities of color.

EVOLUTION

As REPG's work evolved, it has been continually important to reflect on progress. While the core purpose of the effort is to strengthen the internal systems of member foundations, REPG contributes to the broader field of philanthropy

by periodically capturing and publishing updates on member foundations' work plans. Therefore, the REPG raises the standard of practice around how foundations can forge strategies to bring about racial equity and institutionalize systems that enhance the flow and impact of resources to communities of color.

In previous reports, *Profiles in Foundation Giving to Communities of Color Volume I* and *Volume II*, the REPG provided a baseline for foundation giving to communities of color by defining minority-led organizations and communities of color, discussing this from a foundation perspective, and sharing the specific work plans of member foundations to demonstrate the detailed effort involved to assess and measure their grant making and impact on communities of color. The REPG embarked on this effort as a way of establishing the groundwork for sharing lessons on the integration of race and diversity in general, and the significance of race and diversity to the effectiveness of foundations.

Since the late 1990's, a number of salient documents and reports have examined racial equity and diversity in philanthropy and grant making and tools to help philanthropy work better for communities. These publications cover issue areas, and the significance and roles of the many stakeholders in philanthropy, including foundations, donors, grantees, associations, the philanthropic workforce, technical assistance providers and even the needs of communities themselves. They discuss the significance of measuring outcomes, policy, and engagement of the community in creating equity.

For foundations, where it has been noted that progress has been limited due to lack of commitment from leadership and governance, there have been some reflections and stories of

success described by foundation leadership. Some tools have provided foundations with approaches to assist thinking about the impact of race on community outcomes and in using data to help inform grants aimed at reducing race-related disparities in communities.

This paper relies on the lessons learned and the knowledge acquired by the REPG. As the facilitator of the REPG, Marga, Inc., uses this conversation to open up fertile territories where foundations can seed new approaches and practices by translating lessons learned about racial equity and diversity into effective practices in their organizations, the philanthropic community, and communities throughout the world.

> *"You have to have thick skin and strong elbows, but be compassionate and mature."*
>
> - An REPG member's description of what it takes to work on racial equity.

LESSONS LEARNED

The work of the REPG has generated valuable lessons that can assist all foundations in their efforts to make racial equity a core operating value. Additionally, experiences in constructing racial equity approaches can be instructive to addressing other aspects of diversity and philanthropic methods in general.

RACIAL EQUITY

Enhancing Racial Equity in Philanthropy Requires Hard Work and a Long Term Commitment

All REPG members agree that the pursuit of racial equity is not easy, requiring a long-term commitment by the individual(s) leading the effort and the institution. In order to make significant changes, foundations have to be committed over the long-term. Additionally, the conversations that have taken place have been difficult. Talking about race is often tense and awkward, and possibly even more so among those who have a demonstrated commitment to improving communities. In these conversations, resolutions and next steps are not always known, and as such, one (be it an individual or a foundation) must be committed to the end goal. One must see that the outcome will be worth more than the emotional expense of having difficult conversations and the resulting consensus that reflects less than the ideal full agreement.

Given that single conversations will not revolutionize thinking or organizational culture, substantial change requires continuous dialogue. One dialogue without the desired long-term outcome should not be treated as a lack of progress; it is important to continue talking. Additionally, unintended outcomes often emerge along the way. Some aspects of foundation culture counteract protracted approaches to change. For example, foundations often want to see relatively quick results, without acknowledging the long-term investment required to demonstrably alter embedded and reinforced inequities.

Since many foundations were founded several decades ago, particular standards of practice and culture have become somewhat entrenched.

Racial Representation on Nonprofit Boards

White 86%

Black or African American 7%

Hispanic or Latino 3.5%

Others 3.5%
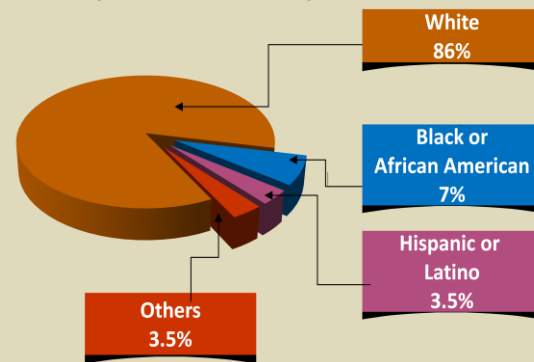
Source: Ostrower, Francie. 2007. "Nonprofit Governance in the US: Findings on Performance and Accountability from the First National Representative Study." *The Urban Institute's Center for Nonprofits and Philanthropy.*

Conversations about race and the idea of integrating racial equity into grant making systems might be utterly foreign and unprecedented. Changing a foundation's systems and practices means that longstanding standards of operating and decision making must change accordingly.

Connected Change Agents Inside Foundations Are Essential to Bringing About Systemic Improvements

Individuals catalyze change in foundations. For those acting as change agents around racial equity in philanthropy, the experience can sometimes be isolating. Spaces like the forum provided by REPG allow change agents to connect to others who are similarly positioned. They need to be connected to their peers at other foundations and their peers working with communities. Each REPG change agent cited his/her participation in the REPG as critical to success, as it has provided opportunities for support from peers. Tools from member foundations presented in REPG meetings have influenced change in other member foundations. The change agents are the carriers of this knowledge, bringing it into their own institutions. Progress at one member foundation can help to initiate discussion at another foundation.

Seeing strength in numbers, REPG members have also said that the more change agents inside foundations the better; and the more pressure from others, both internal and external to the foundation, the more likely change will come to fruition. The demand for racial equity has to come from all sides, including foundation leadership and communities, making organizational leadership from the middle, those that interface with the communities and the foundations, imperative.

Members describe the opportunity to talk candidly with one another as extremely valuable for identifying opportunities to build on one another's experiences. Honest and open communication among peers has been identified as essential.

Success Along the Way Has to Be Acknowledged and Celebrated

Given the required long-term nature of this work, it can be easy to become frustrated and tired; acknowledging incremental progress, however small, can sustain forward momentum. Each new conversation or new initiative lays the groundwork for future steps. Even agreement to continue discussing the issues can be a success in itself.

According to one member, "One of the most refreshing and rewarding things is to have people not of color to take up the banner so that it's not always the choir taking up these issues." Subsequently, the buy-in of those not of color or that do not prioritize the need for further integrating racial equity into a foundation's work can be achieved by small steps grounded in

dialogue. If this dialogue gets stifled, it is more difficult to get those not already sold on the idea to embrace the significance of racial equity to philanthropic pursuits.

Moreover, it is important to publicize progress, as it generates hope, affirms the experiences of others, and sets expectations. Especially when successes are systemic, such as the development of grantee data collection instruments, publicity demonstrates the depth of a foundation's commitment.

The Right Tools and Environment Are Required to Actualize Theories and Ideas About Philanthropic Approaches to Racial Equity

REPG members agree that people work in philanthropy because they want to help others, and that when they see an injustice, they want to do what they can to right the wrong. When it comes to racial equity, people want to help but they don't always have the tools to do it or are not in an environment where they feel they can make a difference. Having data and an *authorizing environment* enhances the potential to incorporate racial equity into strategies and programs. The Kellogg Foundation created an authorizing environment by publicly declaring an "anti-racist" approach to its work. For Kellogg, the salience of race in their issues and communities of concern warranted this explicit commitment. Now that anti-racism is integrated into the primary guiding themes and principles of the Foundation, initiatives addressing race are institutionally justified. The space conducive to incorporating race into the design and delivery of programs and administration is created by this broader framework.

With an authorizing environment, it is easier to stimulate and sustain dialogue reflecting on the impact of race on their organization and their work. Such a context also creates a mandate for related professional development opportunities, another critical tool for addressing racial equity. Both the Annie E. Casey Foundation and the W.K. Kellogg Foundation identified the need to provide staff the opportunity to build their own knowledge about race and its impact on their communities. For Kellogg, adding the external focus on communities automatically meant that the staff had to be prepared to work on addressing racial equity. Both foundations identified the need to integrate this key element of staff work into performance management. Participating in, organizing, and attending events and discussions designed to educate staff on issues of race and culture provide background knowledge and opportunities to help all staff meet performance requirements.

Skillful facilitation can be essential in helping foundations navigate difficult conversations. Someone who has capacity and skill on issues of difference and inclusivity is valuable in avoiding common pitfalls and in helping organizations to know when they have reached consensus.

The Case for the Centrality of Racial Equity to All Forms of Inequality Must Be Made Internally Across All Program Areas

REPG members understand the value of diversity on the whole, but note that a part of their challenge has been that some others do not see the significance of the impact of race within or even compared to other social categories. Part of the challenge for The San Francisco Foundation, for example, has been the question of focusing on race or diversity in general.

LESSONS LEARNED

Beyond the numerous tools and techniques discussed inside and outside the various learning exchanges, in their pursuit of racial equity, members of the REPG have learned:

- Enhancing racial equity in philanthropy requires hard work and a long term commitment

- Connected change agents inside foundations are essential to bringing about systemic improvements

- Successes along the way should be acknowledged and celebrated

- The right tools and environment are required to actualize theories and ideas about philanthropic approaches to racial equity

- The case for the centrality of racial equity to all forms of inequality must be made internally across all program areas

---

Since race and the institutionalization of white privilege has been at the core of inequality historically in the United States, and central to social upheaval that enabled dialogue and action around injustice and inequality in general, it is difficult to separate race from other aspects of diversity. While this may be true, this reality is not readily embraced, and is sometimes met with significant resistance. Regardless, race has remained the most difficult aspect of diversity to address.

FROM RACIAL EQUITY TO DIVERSITY AND PHILANTHROPY

With respect to the significance of racial equity to other aspects of diversity and to philanthropy in general, the experiences of REPG members suggest:

- Structural racism is a root cause of disadvantage,
- Working on racial equity informs diversity in general,
- An analysis of racial equity helps foundations reflect on equity in general,
- Disparities in all aspects of life reflect racial inequities, and
- All program areas in foundations can be enhanced through an approach to racial equity.

RACIAL EQUITY IN RELATION TO DIVERSITY

Race remains one of the more politically charged aspects of diversity. But, as the Civil Rights Movement has demonstrated, efforts to bring about racial equity influence approaches to equity in general.

Structural Racism is a Root Cause of Disadvantage

The W.K. Kellogg Foundation believes that when they achieve racial equity, they will be better positioned to celebrate diversity, because children of color are the most disadvantaged, more often living in concentrated poverty. Though the Annie E. Casey Foundation includes race among a variety of other demographics, reducing racial disparities has also become a priority.

Working on Racial Equity Specifically Informs Diversity in General

When racial equity is addressed, the doors are opened to address other aspects of diversity. This is not to suggest that multiple aspects of diversity cannot be addressed simultaneously; however, with the historical significance of race, it is often easier to catalyze conversations about other aspects of diversity by starting with race than vice versa. The tools and analyses that have resulted from studies of the impact of race on the well-being of families in communities are often a starting point in thinking about diversity more broadly. Indeed, such a wealth of work has been conducted around race that even those addressing diversity outside of race can benefit from the lessons learned in attempts to achieve racial equity.

An Analysis of Racial Equity Helps a Foundation Reflect on Equity in General

It is important to help others see that such an approach is not at the expense of others. By seeing foundation programs in relation to racial equity, the depth of analysis on root causes is strengthened. This rigor assists thinking about the range of factors affecting program areas. Subsequently, the quality of analysis is better across the board.

When it comes to addressing the impact of various social indicators on communities of color in particular, it is difficult to sustain the discussion without the leadership of people of color. Some critical mass of people of color is required to keep the racial equity-focused analysis on the table. If people of color are in trustee rooms and at the table for critical policy discussions, high quality dialogue and more advanced discussions are more likely to occur. This is not to suggest that larger numbers of people of color will automatically lead to greater dialogue and action

on racial equity, but change agents such as the REPG members have noticed some correlation between the presence of people of color in dialogue and the effective nature of discussions.

Ultimately, diversity in numbers of staff, trustees, and leadership enhances the likelihood of varying viewpoints. Different perspectives create different behaviors, outcomes, solutions, directions of grant dollars, and solutions for communities and philanthropy in general. Ultimately, when healthy and productive dialogue on race can be established in a foundation, the environment has been established in order to alter systems and programs accordingly. For example, if broad foundation strategies commit to prioritizing a racial analysis, it is easier to commit to an analysis of other aspects of diversity. If foundations develop systems to measure racial demographics like those of REPG member foundations, they automatically strengthen the infrastructure to measure other demographic elements as well.

RACIAL EQUITY IN RELATION TO PHILANTHROPY BROADLY

The experiences of REPG members suggest that the impact of philanthropy can be significantly expanded by addressing a root cause of disadvantage – structural racism. *Profiles in Foundation Giving to Communities of Color Volume II* provides insight into the significance of race to a range of traditional philanthropic program areas. Race is cross-cutting. It touches every aspect of life, but in particular, it is a central factor in all forms of inequality.

Disparities in All Aspects of Life Reflect Racial Inequities

Given the centrality of race to inequality and the fact that philanthropy often stipulates an aim to reduce inequality in some fashion, it would seem logical that some commitment to racial equity would be incorporated into the core of foundations' work. Formations like the REPG have been developed because the integration of racial equity into many foundations has not been automatic. Change agents like those who represent their foundations in the REPG have tended to encounter a separation of race from the core of program work and an assumption that addressing inequality without a racial perspective can improve circumstances for all affected parties. As a result these kinds of dynamics, approaches to race in foundations have often been compartmentalized and/or shifted to the margins.

All Program Areas in Foundations can be Enhanced through an Racial Equity Approach

Communities of color are often the most adversely affected by inequities in economics, health, education, and many other areas. However, as has been well documented, the distribution of foundation dollars tends to disproportionately miss communities of color. As philanthropy reflects upon these allocation inequities, communities of color are often not represented in these discussions. As a result, foundations are not maximizing the opportunity to have greatest impact by targeting investments for improvement toward the areas of greatest need.

In part, philanthropy has not automatically embraced a racial equity agenda due to the complexity of the role of foundations in relation

to the origins of philanthropy. Large foundations in particular usually do not emerge from communities of color or represent such populations. Even more mature foundations that have become institutionalized and somewhat distant from their original donors often do not have diverse leadership or staffing. As has been noted in numerous studies, access to grants in foundations is heavily influenced by relationships through circles often closed to communities of color. This internal reality only reinforces the significance of internal change agents who entered the staff and leadership of foundations.

CONCLUSION

The Race and Equity in Philanthropy Group has made great headway in improving the receptivity of member foundations to racial equity. In the public and private discourse on racial equity, these foundations can be classified as bold, innovative, and hopeful leaders who possess the courage to step beyond the status quo. Learning exchanges build community where foundation leaders and their peers exchange ideas and gain the support, ideas, and encouragement to break boundaries.

In the report to the Annie E. Casey Foundation in 2005, Marga identified an essential optic for examining the issue of racial diversity, "For example, being effective around inclusion is more than a matter of achieving diversity. In a changing world where populations have come to cohabitate more than ever, a greater understanding of race, class and culture is necessary."[3]

Following this line of reasoning, foundations must situate their racial analysis and practical work of creating racial equity within a social context that stresses the interlocking connections of race, poverty and gender vulnerability in defining status, social and economic relations, and power. Within this paradigm, it is important for foundations to develop a comprehensive and nuanced understanding of the places where communities of color share specificities and where they differ.

These differences do not negate the multiple experiences of people of color as an underrepresented group within philanthropy. Nor does it mean that the multiple inequities in communities of color are too complex and varied for foundations to address. It also does not mean that foundations should place communities of color in a scarcity culture, left to compete for severely limited funding.

Making a decision to embrace diversity and achieve racial equity requires changes to the old or regular ways of doing business and changes within the people who carry out the business. Moreover, it requires foundations to recognize the significance of racial inequity in the communities they serve. It requires the long-term commitment on behalf of foundations, change agents with access to and the support of others, tools and the space to do this work , and ongoing celebrations of progress.

---

[3] Marga Incorporated. (2005). *Race, Culture, Power, and Inclusion in Foundations: A Report Conducted for the Annie E. Casey Foundation.* (p. 5)

REFERENCES

A project of the Coalition of Community Foundations for Youth and California Tomorrow. (2003). *Leading by Example: Diversity, Inclusion, and Equity in Community Foundations*. California Tomorrow. Retrieved April 9, 2009, from the California Tomorrow Web site: http://www.californiatomorrow.org/media/lbe.pdf

Adams, T. (2005). *Founder Transitions: Creating Good Endings and New Beginnings: A Guide for Executive Directors and Boards*. Annie E. Casey Foundation (AECF); Evelyn and Walter Hass, Jr. Fund. Retrieved April 9, 2009, from AECF Web site: http://www.aecf.org/upload/PublicationFiles/LD2928K642.pdf

Aguilar, O. (2008, September/October). *Philanthropy's Race Problem.* Applied Research Center. Retrieved April 9, 2009, from ColorLines Magazine Web site: http: http://www.colorlines.com/article.php?ID=454

Aguilar, O., Duenas, T., Flores, B., Codinez, L., Joy, H., & Zavala, I. (2005, November). *Fairness in Philanthropy - Part 1: Foundation Giving to Minority Led Nonprofits.* Retrieved April 9, 2009, from the Greenlining Institute Web site: http://www.greenlining.org/resources/pdfs/FairnessinPhilanthropyPartIFoundationGivingtoMinorityledNonprofits.pdf

Aguilar, O., Duenas, T., Flores, B., Codinez, L., Joy, H., & Zavala, I. (2005, November). *Fairness in Philanthropy – Part II: Perspectives from the Field*. Retrieved April 9, 2009, from the Greenlining Institute Web site: http://www.greenlining.org/resources/pdfs/FairnessinPhilanthropyPartIIPerspectivesfromtheField.pdf

Algernon, A., & Brielle, B. (2008). *A Comprehensive Bibliography of Resources Related to Diversity Within the Philanthropic and Nonprofit Sectors*. Retrieved April 2, 2009, from the Foundation Center Web site: http://www.diversityinphilanthropy.org/events/files/foundation%20center%20bibliography.pdf

Annie E. Casey Foundation (AECF). (2006). *Race Matters.* Retrieved April 9, 2009, from AECF Web site: http://www.aecf.org/KnowledgeCenter/PublicationsSeries/RaceMatters.aspx

Annie E. Casey Foundation (AECF). (2006). *Race Matters: Racial Equity Impact Analysis – Assessing Policies, Programs, and Practices*. Retrieved April 9, 2009, from AECF Web site: http://www.aecf.org/upload/publicationfiles/racial_equity_analysis.pdf

Basgal, O. *Differences Between Approaches to Diversity in the Corporate Sector Versus the Philanthropic Sector*. Retrieved April 2, 2009, from Diversity in Philanthropy Web site: http://www.diversityinphilanthropy.org/news/case_studies/videos/video2/

Burbridge, L. C., Diaz, W. A., Odendahl, T., & Shaw, A., (2002). *The Meaning and Impact of Board and Staff Diversity in the Philanthropic Field: Finding from a National Study. Joint Affinity Groups (JAG).* Retrieved on April 2, 2009 from Asian Americans/Pacific Islanders in Philanthropy Web site: http://www.aapip.org/pdfs/jag_all.pdf

Center for Assessment and Policy Development. (2005). *Evaluation Tools for Racial Equity: Tips.* Retrieved April 9, 2009, from the Evaluation Tools for Racial Equity Web site: http://www.evaluationtoolsforracialequity.org/evaluation/tip/index.htm

Center for Effective Philanthropy. (2007, March 8-9). *Assessment to Action: Creating Change (A Report on a Gathering of Foundation CEOs, Trustees and Senior Executives)*. Retrieved April 9, 2009, from The Center for Effective Philanthropy Web site: http://www.effectivephilanthropy.org/images/pdfs/CEP_Assessment_to_Action_Conference_Pub_2007.pdf (p. 24).

Chao, J., Branch, R. B., & Shah, M. (2008, December). *Diversity & Inclusion: Lessons from the Field.* New York: Rockefeller Philanthropy Advisors. Retrieved April 2, 2009 from the RPA Web site: http://rockpa.org/wp-content/uploads/2008/12/diversity-inclusion.pdf

Chao, J., Parshall, J., Amador, D., Shah, M., & Yanez, A. (2008, April). Philanthropy in a Changing Society: Achieving Effectiveness through Diversity. Rockefeller Philanthropy Advisors (RPA). Retrieved April 2, 2009 from the RPA Web site: http://rockpa.org/pdfs/Philanthropy_in_a_Changing_Society_summ.pdf

Chao, J., Parshall, J., Amador, D., Shah, M., & Yanez, A. (2008, April). *Philanthropy in a Changing Society: Achieving Effectiveness through Diversity*. New York: Rockefeller Philanthropy Advisors. Retrieved April 2, 2009 from the RPA Web site: http://rockpa.org/pdfs/Philanthropy_in_a_Changing_Society_full.pdf

Cowles, J., Jr., & Hill, L. W., Jr. (2006, April). *Behind the Curve: Philanthropy Revisited*. Hubert H. Humphrey Institute of Public Affairs (University of Minnesota). Retrieved April 2, 2009, from the Humphrey Institute Web site: http://www.hhh.umn.edu/centers/pnlc/pdf/jcowles_behind_curve.pdf

Diversity in Philanthropy. (2008, January). Interview with Emmett D. Carson. Retrieved April 9, 2009, from Diversity in Philanthropy Web site: http://www.diversityinphilanthropy.org/voices/interviews/pdfs/Emmett_Carson_Interview.pdf

Diversity in Philanthropy. *Diversity Philanthropy Best Practices Study -- Children, Youth and Family Philanthropy*. New York: Diversity in Philanthropy Project Retrieved April 2, 2009, from: http://www.diversityinphilanthropy.org/news/case_studies/pdfs/Children_Youth_and_Families_Case_Study.pdf

Diversity in Philanthropy. *Diversity Philanthropy Best Practices Study -- Health Foundations.* New York: Diversity in Philanthropy Project. Retrieved April 2, 2009, from Diversity in Philanthropy Web site: http://www.diversityinphilanthropy.org/news/case_studies/pdfs/Best_Practices_Study_Health_Foundations.pdf

Ford Foundation. (2002). *Building Assets to Reduce Poverty and Injustice*. Retrieved April 2, 2009, from the Ford Foundation Web site: http://www.fordfound.org/pdfs/impact/building_assets.pdf

Gates, C. T. *The Imperative for Mainstream Organizations to Take on Diversity and Inclusion Now, to Address Society's Most Intractable Ills*. Retrieved April 2, 2009, from Diversity in Philanthropy Web site: http://www.diversityinphilanthropy.org/news/case_studies/videos/video3/

GrantCraft in Partnership with Philanthropic Initiative for Racial Equity. (2008). *Grantmaking with a Racial Equity Lens.* New York: GrantCraft. Retrieved April 9, 2009, from GrantCraft Web site: http://www.grantcraft.org/index.cfm?fuseaction=page.viewpage&pageid=840

Grantmakers for Effective Organizations. (2008). *Is Grantmaking Getting Smarter?* Retrieved April 2, 2009, from Diversity in Philanthropy Web site: http://www.diversityinphilanthropy.org/images/stories/pdfs/resources/GEO%20-%20Is%20Grantmaking%20Getting%20Smarter_.pdf

Greenlining Institute. (2006, Fall). *Investing in a Diverse Democracy: Foundation Giving to Minority-led Nonprofits.* Retrieved April 9, 2009, from The Greenlining Institute, Web site: http://www.greenlining.org/resources/pdfs/InvestinginaDiverseDemocracyFoundationGivingtoMinorityLedNonprofits.pdf

Gupta, P., & Ritoper, S. (2007, June). Growing Opportunities: Will Funding Follow the Rise in Foundation Assets and Growth of AAPI Populations? Asian Americans/Pacific Islanders in Philanthropy (AAPI). Retrieved on April 2, 2009, from the AAPI Web site: http://www.aapip.org/pdfs/AAPIP-GOpps4WWW.pdf

Hopkins, J. *The Process of Addressing These Concerns While Maintaining the Foundation's Commitment to Diversity.* Retrieved April 2, 2009, from Diversity in Philanthropy Web site: http://www.diversityinphilanthropy.org/news/case_studies/case_2.php

Kretzmann, J. P., McKnight, J. L., Dobrowolski, S., & Puntenney, D. (2005). *Discovering Community Power: A Guide to Mobilizing Local Assets and Your Organization's Capacity.* The Asset-Based Community Development Institute. W.K. Kellogg Foundation. Retrieved April 2, 2009 from the Northwestern School of Economic and Social Policy Web site: http://www.sesp.northwestern.edu/images/kelloggabcd.pdf

Lindsey, K.R. (2006, November). *Racial, Ethnic, and Tribal Philanthropy: A Scan of the Landscape.* Forum of Regional Associations and Grantmakers. Retrieved on April 9, 2009 from Giving Forum Web site: www.givingforum.org/s_forum/bin.asp?CID=49&DID=6461&DOC=FILE.PDF

Lonner, T. D. (2007, July). *Encouraging More Culturally & Linguistically Competent Practices in Mainstream Health Care Organizations: A Survival Guide for Change Agents.* Retrieved April 2, 2009, from CompassPoint Web site: http://www.compasspoint.org/assets/494_lonnerfull.pdf

Lyman, J. *The Loss of Potential That the Sector Risks When it Fails to Embrace Diversity.* Retrieved April 2, 2009, form Diversity in Philanthropy Web site: http://www.diversityinphilanthropy.org/news/case_studies/videos/video1/

Mayer, S. E. (2007, January 31). Gaps in Racial Equity and Strategies for Reducing Them. Effective Communities, LLC. Retrieved April 9, 2009 from Justphilanthropy.org Web site: http://www.justphilanthropy.org/resources/Gaps.pdf

McKendall Stephens, V., (2006, September 1). Moving Past the Silence: A Tool For Negotiating Reflective Conversations About Race: Moving Philanthropy Closer to Racial Equality and Social Justice. Effective Communities, LLC. Retrieved April 2,2009, on Justphilanthropy.org. Web site: http://www.justphilanthropy.org/resources/Conversations.pdf

National Committee for Responsive Philanthropy. (2008). *Criteria for Philanthropy at It's Best: Benchmarks to Assess and Enhance Grantmaker Impact.* Washington, D.C.: National Committee for Responsive Philanthropy.

Ostrower, F. (2007, June 25). *Nonprofit Governance in the US: Findings on Performance and Accountability from the First National Representative Study.* Retrieved April 9, 2009, from The Urban Institute's Center for Nonprofits and Philanthropy Web site: http://www.urban.org/UploadedPDF/411479_Nonprofit_Governance.pdf, (p. 18).

Ramos, H. A. J., Walker, C. J., & Kasper, G. (2004, November/December). *Making the Case for Diversity in Philanthropy (Vol. 45, No. 6).* Retrieved April 9, 2009, from Foundation News and Commentary Web site: http://www.foundationnews.org/CME/article.cfm?ID=3054

Ranghelli, L. (2005, November). *Strengthening, Democracy, Increasing Opportunities - Impacts of Advocacy, Organizing, and Civic Engagement in New Mexico.* Retrieved April 2, 2009, from Diversity in Philanthropy Web site: http://www.diversityinphilanthropy.org/images/stories/pdfs/resources/NCRP%20-
%20Strengthening%20Democracy,%20Increasing%20Opportunities.pdf

St. Onge, P., Cole, B., & Petty, S. (2003). *Through the Lens of Culture: Building Capacity for Social Change and Sustainable Communities.* National Community Development Institute (NDCI). Retrieved April 2, 2009 from NDCI Web site: http://www.ncdinet.org/media/docs/7058_ThroughtheLensofCulture.pdf

Tempel, E. R., & Smith, L. (2007, February 26). *Nonprofits Have a Spotty Record on Diversity.* Retrieved April 9, 2009, from Nonprofit Times Web site: http://nptimes.com/07Feb/news-070226-1.html

Toney, J. (2007). Minnesota Legislative Report Card on Racial Equity. Organizing Apprenticeship Project (OAP). Retrieved April 2, 2009 from the OAP Web site: http://www.oaproject.org/files/MN_Racial_Equity_Report_Card_05-06.pdf

Villarosa, L. (2008, April). *Critical Issues Forum: Measuring What We Value.* Washington, D.C.: Philanthropic Initiative for Racial Equity (PRE).

Vogelsang, J., Gardon, A., Taveras, B., & Wilson, R. (2009). *Social Catalysts: A Case Study of Fifteen Successful Diversity Focused Funds.* New York: The Diversity in Philanthropy Project. Retrieved April 2, 2009, from Diversity in Philanthropy Web site: http://www.diversityinphilanthropy.org/news/case_studies/pdfs/Social-Catalysts-15-Successful-Diversity-Focused-Funds.pdf

Wilcox, T. *Enlightened Self-interest.* Retrieved April 2, 2009, from Diversity in Philanthropy Web site: http://www.diversityinphilanthropy.org/news/case_studies/case_3.php

For information about this document or the Race and
Equity in Philanthropy Group, please contact:

Marga Incorporated
245 Park Avenue
39th Floor, Suite 85
New York, NY 10167
(212)979-9770
repg@margainc.com
www.margainc.com

MARGA
INCORPORATED