



UNITED PHILANTHROPY
FORUM

A network for the common good

**A STRONGLY-ROOTED
RACIAL EQUITY JOURNEY:
The Case Story of
Northern California
Grantmakers**

**Prepared by Community
Centered Evaluation and
Research**

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Acknowledgements

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ABOUT THE KEY AUTHOR

Community Centered Evaluation and Research (CCER) was founded in 2018 out of a desire to center racial and economic equity in research and evaluation. Community CER is a values-driven, woman-of-color-owned social change research and evaluation consulting firm dedicated to supporting social sector organizations to achieve their greatest impact.

ABOUT THE CASE STORIES AND THEIR CONTRIBUTORS

Advancing racial equity, diversity, and inclusion (REDI) in philanthropy is a key strategic priority for the United Philanthropy Forum (Forum). Over the last few years, Forum has embedded racial equity intentionally and explicitly, both internally with the organization and externally through programming and resources to PSO members. Among the resources provided to member PSOs is the Forum's Racial Equity Organizational Self-Assessment, originally launched in 2019. The findings from the 2019 assessment helped Forum better understand how to support members along their racial equity journey, as well as provided great insights for members about their own racial equity journey and that of the sector.

To complement the learnings from the Racial Equity Organizational Self-Assessment, the Forum commissioned Community Centered Evaluation and Research (CCER) to uplift and share PSO member's racial equity learning journeys through the development of in-depth case stories. The case stories capture the wide experiences of PSOs across varying geographic regions and organizational size and breadth of focus. Four Forum PSO member organizations shared and reflected on their internal and external racial equity journey through one-on-one, in-depth interviews conducted with various staff members. The PSO member organizations that participated in the case stories are listed below, along with the key staff that contributed their time and perspectives.

ABOUT THE FORUM

As the largest and most diverse network in American philanthropy, United Philanthropy Forum holds a unique position in the social sector to help increase philanthropy's impact in communities across the country. We are a membership network of nearly 100 regional and national philanthropy-serving organizations (PSOs), representing more than 7,000 funders, who work to make philanthropy better. The Forum envisions a courageous philanthropic sector that catalyzes a just and equitable society where all can participate and prosper.

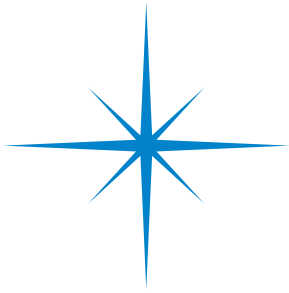
The Forum has created a new kind of philanthropic network that brings together regional PSOs' deep regional roots and connections with national PSOs' deep content knowledge and reach. Given our network's scale and scope, we can lead change and increase impact in philanthropy in a deeper and broader way than any other organization in our field.

To learn more about Forum membership, please visit: www.unitedphilforum.org/join.

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About This Case Story

The story of Northern California Grantmakers' racial equity journey provides a roadmap for setting racial equity as the 'North Star' and how to operationalize organization-wide racial equity practices.

For over forty years, Northern California Grantmakers (NCG), based in San Francisco, California, has brought together foundations, nonprofit organizations, government, and businesses to address Northern California's complex social issues and inequities. NCG's mission is to *bring philanthropy together to build healthy, thriving, and just communities*.

NCG, along with its 220 active member grantmakers and organizations, serves a culturally rich region diverse in race, ethnicity, population density, gender identity, sexual orientation, and politics. While Northern California's diversity is an asset in many ways, some aspects can also raise tensions and challenges. The region's socioeconomic diversity, for example, including severe wealth disparities in the Bay Area¹, contributes to persistent needs for affordable housing and broader access to services and higher education. In 2017, in response to the region's complex social and justice issues, NCG established three areas of focus.

- **Equity and Social Justice:** Activating philanthropy to shape a world where all people can flourish
- **Leadership, Culture, and Community:** Nurturing the dynamic and diverse people and institutions in philanthropy
- **Strategic Initiatives:** Building networks to sustain the fabric and culture of the place we call home

NCG's 23-member staff work across these three areas of focus under the direction of their Board of Directors and their President and CEO, Dwayne S. Marsh, who joined NCG in September 2020. Each focus area is led by a key member of NCG's staff. Alice Y. Hom is the Director of Equity and Social Justice; Kate Seely is the Senior Director of Leadership, Culture, and Community; and Steve Barton is the Vice President of Strategic Initiatives.

¹ According to a 2016 Issue Brief released by the California Budget and Policy Center, the San Francisco metro area ranked first in California for economic inequality. <https://nccg.org/regional-facts>

ESTABLISHING RACIAL EQUITY AS THE NORTH STAR

Seeding a racial equity journey. NCG’s racial equity journey began long before the nationwide racial awakening that followed the 2020 murder of George Floyd at the hands of police officers. The Equity and Social Justice area of focus was formally created in 2017 and described by leadership at the time, according to long-standing staff, “as a strategic underpinning of [NCG’s] work.” This area of focus was itself built upon existing elements of racial equity in the NCG ether. Specifically, the organization’s grantmaking membership base in the early 2010s called on NCG to examine the role that race played in the outcomes that communities of color endured. In response, NCG’s then President and CEO, Ellen LaPointe, conducted a “listening tour,” holding conversations with more than 100 grantmaking members. These conversations led to the restructuring of NCG along its current three areas of focus and, importantly, uplifted Equity and Social Justice as a critical pillar for NCG. NCG continued to answer this call to action by bringing in more direct programming for members that centered racial equity. In turn, NCG’s responsiveness to members who were leaders in this space seeded the beginning of the organization’s racial equity journey.

“We had many members that were in the [equity and social justice] space already. We had programming that aligned with that perspective. With Ellen coming in [as CEO] it was defined as one of the three key pillars of our organizational strategy.”

-NCG Staff

Looking inward. Along with elevating Equity and Social Justice as a critical area of focus in 2017, NCG looked inward and began a yearlong training with Hackman Consulting Group focused on deepening their understanding of racial equity and the historical legacy and effects of white supremacy. These opportunities were aimed at providing all staff across Philanthropy California with a foundational understanding of the impact of race across our society. As staff learned together, they also began to apply a racial equity lens to their internal policies and practices, including their employee handbook and existing vendor list. Recognizing that racial equity work is “ongoing and lifelong” work, in early 2020, NCG partnered with the capacity-building group Team Dynamics to focus on understanding how racism can show up in teams and across the organization through the Intercultural Development Inventory, which assesses each staff member’s orientation towards difference and commonality. According to staff, a key offering that the work with Team Dynamics offered was their focus on intersectionality. Bringing an intersectional lens helped create awareness about the “different dynamics of racial equity within the culture” and the role different identities play in unpacking racial equity.

“Racial equity is an organizational-wide lens. It is not necessarily just a practice or a vision. It is about making sure that racial equity is embedded in everything that we do. It is making sure all of our internal work, practices, and policies as well as our external facing [programming] is centering racial equity. It is the glue that holds our work together.”

-NCG Staff

All in. NCG was well along its racial equity journey when it onboarded its new President and CEO, Dwayne S. Marsh, in September 2020. As an organization, NCG was ready to expand its commitment to racial equity and needed a leader who could help operationalize racial equity practices across the organization. Dwayne brought to NCG an abundance of experience working in public, nonprofit, and philanthropic sectors and a commitment to advancing racial and economic equity. Under Dwayne’s leadership, according to staff, NCG’s journey deepened, “doubling down on racial equity and getting more focused organizationally.” Reflecting on his early days as NCG’s President and CEO, Dwayne recognized the foundational racial equity work NCG had embarked on before his arrival.

“NCG had momentum thinking about issues of equity and social justice. It has not meant a hard left turn for us to center and name racial equity as the North Star. The difference has been twofold. One has been making sure that in everything we are lifting up, we consider how race plays into it as a pathway to produce less disparate outcomes for communities. And the second thing is that how we do it matters. Being clear about how we do things has been really important. This helps us name whether we should pursue opportunities or not because we could do almost anything, but this is helping us move towards our North Star and where we want the field to move.”

NCG’s framework

- Confront the 5 Pandemics | Equitable Recovery
- Accelerate Change in Philanthropic Leadership | 5 Shifts
- Address the Burning World | Climate and Disaster Resilience
- Move the Masses | Cohort-Centered Learning
- Build the Partnerships that Work | Collaborative Leadership and Participation
- Build Power for Communities | Movement Building and Capacity
- Save the Part of the Frame Worth Saving | Democracy Preservation

INTERNAL APPROACH

As an organization, NCG has understood the importance of focusing on the internal organizational policies, practices, and culture while also offering their members external programming to support their racial equity journey. A key focus of NCG's internal work, as highlighted by staff, is its inclusive approach to weaving racial equity into the fabric of the organization. Throughout their learning journey, NCG has worked collectively to ensure that everyone understands that regardless of their title, they have a role to play in advancing racial equity. This approach has helped NCG break down departmental siloes that existed in the past and work toward a "cohesive and strategic direction" for the organization where staff hold each other accountable. NCG staff described the following specific efforts as central to the organization's push to shift its internal culture and practices:

"Making [our internal racial equity work] an open forum where people didn't feel excluded and the process didn't feel hierarchical was really helpful. I appreciated that our approach eliminated those barriers. The other side of having an open collaborative process where everyone can contribute is that it ends up taking a lot of time and energy."

-NCG Staff

Recruitment and hiring to support the racial equity work. In addition to the internal trainings aimed at "building a shared understanding of the historical, political, and contextual origins of race and racism," NCG focused on their recruitment and hiring. NCG is intentional about sharing its racial equity framework and naming racial equity as the organization's North Star. This helps ensure there is alignment about racial equity with candidates from the onset and ensures they understand the importance of having the capacity to apply a racial equity analysis to all aspects of the work. However, NCG staff elevated the "deep tension between needing to fill positions and needing individuals who can add to the capacity" needed for racial equity work. While delays in filling critical positions pose challenges and can add a burden to staff while positions are filled, having staff who have a deep commitment to equity is vital for NCG. The investment in recruiting and hiring proved a success for NCG as several of the new hires shared that being drawn to NCG because of their explicit commitment to equity.

“Hiring is critical. If an organization is committed to [racial equity] work, every person hired should be capable of supporting the work. It matters who is in the room doing the work. We share our racial equity framework with every person we hire.”

-NCG Staff

Board training, conversations, and retreats. While NCG’s board members have been on board with centering racial equity, they have also committed to participating in their own training, conversations, and retreats to ensure they are aligned with staff and senior leadership. The retreats and ongoing conversations the board has engaged in have explored both their individual experiences and understanding of racial equity and its importance in their sector and the work and leadership of NCG. These learning opportunities have been facilitated both by external consultants well versed in racial equity and justice, and more recently by the CEO in partnership with board leadership.

Normalizing conversations about race and racism. NCG has been intentional about creating space and opportunities for staff to talk about issues related to racial equity and justice. Conversation starters include reviewing articles and podcasts, or digging into current events and examining how they relate to NCG’s work and its impact. While staff participation is optional, NCG is intentional about offering different “access points” to race-centered discussion for the staff. The ability to engage in these conversations is challenged by the workload staff experiences in delivering to membership, but there is no question about the level of interest amongst staff.

Creation of an organization-wide plan that centers racial equity. NCG’s 2022 strategic plan and accompanying focus area work plans were developed using racial equity analysis and a proven planning methodology. Staff noted that the racial equity framework introduced by Dwayne along with the plethora of staff trainings and ongoing interdepartmental conversations proved essential in developing an organization-wide plan that was “concretely based on centering racial equity.” The team was trained on this approach in 2021, and continues to work towards tracking data and refining actions that will lead them to deeper impact.

EXTERNAL PROGRAMMING

In keeping with NCG’s explicit focus on equity and social justice, the organization has offered a wide range of programming to its grantmaking members and partner organizations to activate them to advance equity and social justice within their respective institutions and the broader field. NCG recognized that while some of its members were further along in their equity journey, much of its core audience was (and continues to be) the “moveable middle”—groups that were “grappling with how to do racial equity work.” Understanding their audience was instrumental in their communications and messaging, the types of programming offered, and the creation of “on-ramps” to help groups ease into their racial equity journey. Highlighted below are a few of the programs offered by NCG.

Racial Equity Action Institute. An eight-month, multi-sector cohort-based virtual experience with interactive convenings offered to individuals interested in advancing racial equity, diversity, and inclusion within their institutions.

Equity and Social Justice Events. Programming that is designed to activate philanthropy to advance social justice issues such as racism, sexism, homophobia, ableism, and classism through multi-sector partnerships.

Philanthropy California’s Foundations of Racial Equity: Training series for philanthropic practitioners to help understand how anti-Black racism and white supremacy influence the field of philanthropy.

To complement the programming offered to grantmaking members and partner organizations, NCG lends its voice and influence to policy platforms and positions that move racial equity and social justice issues to the forefront. For example, NCG endorsed several California ballot measures including Propositions 17, Voting Rights Restoration for Persons on Parole Amendment that was successfully passed in 2020 gave people on parole for felony convictions the right to vote in California.

“Our strategic planning process led us to an important conversation around leadership in the sector and the role that NCG – as PSO – [can play] to support and catalyze action among members. We saw an opportunity for leadership around racial equity.

-NCG Staff

AT A GLANCE: NCG’S INTERNAL AND EXTERNAL RACIAL EQUITY EFFORTS

Internal Efforts	External Efforts
<ul style="list-style-type: none"> • Explored context. With the help of Hackman Consulting Group, NCG deepened its understanding of racial equity and the historical legacy and effects of white supremacy. • Shared Analysis. The team spent several months building an organizational perspective on what constitutes racial equity in communities and the role of philanthropy of investing in it. • Reflected on embedded culture. Team Dynamics coached NCG on focusing on organizational culture and understanding how racism can show up in teams and across the organization. • Adopted new approaches for hiring and recruitment to ensure all new staff would contribute to the equity journey. • Sought Board alignment with equity work through training, conversations, and retreats. • Offered opportunities to normalize conversations about race and racism. • Reviewed internal practices, including the employee handbook and vendor pool. 	<ul style="list-style-type: none"> • Racial Equity Action Institute (REAI) launched in 2019 • Equity and Social Justice Programming • California Criminal Justice Funders Group • Racial Equity focused Trainings: Foundations of Racial Equity • Communications Institute • Equitable Recovery Framework • Five Shifts • Youth Power Fund • Climate Equity Working Work

LESSONS FOR PSOS AND PHILANTHROPY

NCG's racial equity journey was built upon years of ongoing conversations, trainings, retreats, and planning to arrive at their North Star that centers racial equity. Their successes and strategies to mitigate challenges encountered are important lessons for philanthropy-serving organizations (PSOs) and philanthropy. Below we share recommendations from the NCG team based on their experiences developing an organization that centers racial equity. It is important to stress that the lessons shared below come from NCG's ongoing journey, and as they have shared, "don't have it all figured out" but are continuously working through their "pinpoints."

Start somewhere. There are multiple entry points to racial equity, with institutions at all different stages of development along their racial equity journey. The important thing is to get started. For some, a starting point might be talking to peers who have started the journey to understand what has and has not worked for them.

Develop a shared understanding and language. Creating awareness and historical understanding of the role that race, racism, and white supremacy have played is important because it helps individuals understand how these dynamics are replicated in institutional settings. Developing a shared contextual reference and language also situates the work within broader systems and culture that can ease tensions around individual blame and shame and can help mitigate potential microaggressions.

Help staff and other participants become comfortable with being uncomfortable. Racial equity and justice issues are by nature complex and challenging. Working through the deeper issues associated with racial equity and justice can create challenging and uncomfortable moments; however, it is through these uncomfortable moments that the deeper issues can be addressed to move organizations in the right direction. External consultants can play a role in helping staff navigate challenging conversations. Their role as neutral facilitators can reduce tension and help staff and participants navigate the different levels of individual and systemic racism.

Advance racial equity through teamwork. While it is important that everyone participates in advancing racial equity, it is especially key that leadership be fully invested and that a team of committed individuals take on the implementation. Advancing racial equity should not be spearheaded by one individual but by a team who can distribute the work and the responsibility.

Be practical about what your organization can accomplish. Be clear and understand your staff's capacity and limitations to implement racial equity strategies. While it is important to be "bold and ambitious" about the racial equity efforts you want to advance, NCG staff suggest it is important to "balance that with being practical." On a regular basis situate the progress you have made with your racial equity efforts and assess your staff's capacity. Staff recognizes that "this work is vast and broad and [they] cannot do it all at once." It is important for the "leadership team to be clear about where [they] are able to make changes/moves" and where change is not possible or will take more time.

Make space for healing and respite. Racial equity work is difficult and taxing work. Coupled with the immense trauma and fatigue brought on by the COVID-19 pandemic, it is vital that organizations build space for healing and respite care. This is particularly important for staff of color who have often are asked to take leadership roles in this space. For NCG, this took the shape of a wellness initiative that included giving staff additional time off, closing the organization for staff rest days, and providing resources for self-care.

"Reach out and connect with colleagues. We are all on this journey together. Sometimes we feel isolated or uniquely challenged in what it is we are trying to do around race equity internally or even externally in our work among our membership. But the truth is that many of us are experiencing some of the same challenges. So, reach out, connect, share insights, experiences, best practices, and challenges. The answers may not be obvious, but they will emerge for us as a field if we do this work together."

-NCG Staff

THE JOURNEY CONTINUES

NCG's internal and external work continues to focus on confronting the inequities that permeate institutions and systems. Beyond working to mitigate inequities, NCG strongly believes PSOs should embrace a catalyst role in the sector by continuing to look within to advance their internal racial equity work as well as serving as examples for philanthropy as a field.

Ongoing internal work.

- **Healing Justice and Wellness.** Recognizing the collective trauma and fatigue staff has endured over the last couple of years, NCG plans to sustain and reinforce its healing justice and wellness work for the staff. This includes identifying opportunities to incorporate wellness goals for staff.
- **Streamline racial equity messaging.** NCG provides a plethora of programming for members that involved constant messaging. As the work progresses, NCG is working to streamline its racial equity messaging to avoid duplicating work across different departments. The aim is to be the “most effective with how they are holding and sharing racial equity messages and how [we] are encouraging members to operationalize it.”

Ongoing external work.

- **Increasing Board Members' and Trustees' awareness and understanding of racial equity.** NCG staff and board recognize that as NCG continues to support members, a key element of its programming will focus on addressing the needs of board members and trustees around issues of racial equity and helping them understand how they can support their organizations.
- **Creation of cohort-based learning opportunities for members and organizations.** NCG emphasizes the importance of cohort and peer-to-peer-based learning. This approach helps create products and environments that take into account multiple perspectives and help encourage peers to take bolder steps at their respective institutions through a collective learning methodology.
- **Five Shifts.** NCG, in partnership with the David and Lucile Packard Foundation and Greater Impact, spearheaded the development of the [Get It Right: 5 Shifts Philanthropy Must Make Toward an Equitable Region](#). The report calls on philanthropy to take a coordinated regional response to address the inequities in the northern California region. The report details the 5 shifts that are needed to achieve an equitable recovery in the aftermath of the COVID-19 pandemic that sparks shared prosperity: (1) centering community, (2) focusing on systems, (3) advancing collective action, (4) leveraging capital, and (5) updating practices.