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**Developing a Racial Equity Stance:
Moving Philanthropy Beyond Diversity Statements**

**A Research Project
Presented to the Faculty of
The George L. Graziadio
School of Business and Management
Pepperdine University**

**In Partial Fulfillment
of the Requirements for the Degree
Master of Science
in
Organization Development**

**by
Maegan Scott
April 2017**

This research project, completed by

MAEGAN SCOTT

under the guidance of the Faculty Committee and approved by its members, has been submitted to and accepted by the faculty of The George L. Graziadio School of Business and Management in partial fulfillment of the requirements for the degree of

MASTER OF SCIENCE
IN ORGANIZATION DEVELOPMENT

Date: April 2017

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Abstract

Over the past several years the national conversation about race, inequality, and power in the United States has grown in both urgency and intensity. In parallel to these social trends, more businesses, nonprofit organizations, and philanthropies are becoming better informed about the role of race and ethnicity in social and economic and disparities. The purpose of this study was to conduct action research to develop a racial equity stance at the Eugene and Agnes E. Meyer Foundation in Washington, DC. This study also examined the role of cultural competence in supporting the development of a racial equity stance. The impetus for this research was founded on the premise that the social sector can be equipped to meet the challenge of achieving racial justice. This study examined the process of one foundation's attempt to build its capacity to embed a racial equity lens in its operations and grantmaking strategy.

Keywords: Philanthropy, Cultural Competency, Racial Equity, Racial Justice

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Chapter 1: Introduction

Over the past several years, and against the backdrop of too many tragedies, the national conversation about race, inequality, and power in the United States has grown in both urgency and intensity. Across the country, the resurgence of grassroots movements such as Black Lives Matter, protests against police shootings of unarmed people of color, and other demonstrations (many of which are reminiscent of the Civil Rights era) serve as an unavoidable indicator that the social and economic forces that create, perpetuate, and exacerbate inequality, many of which date back to slavery and the colonial era, still exist today.

For people working in the social sector (e.g., nonprofit organizations, philanthropies, think tanks, socially focused businesses) the urgency and intensity of this conversation is not new, even if its tone and visibility have changed. It has been acknowledged that many of the country's social and economic challenges (e.g., income and wealth inequality, unemployment, low educational attainment, poor health) disproportionately affect communities of color (Brennan, 2016; Mitnik & Grusky, 2015; Sharkey 2016). While anti-poverty focused organizations acknowledge that many of the country's social and economic challenges including poverty and its consequences more often impact people of color than whites, few have named racism as the key factor driving inequality in regions across the United States (Cohen, 2014).

Cohen (2014) explains how foundations dedicated to alleviating and/or eradicating poverty have historically addressed issues of race in their work:

“Many foundations from the 1970s through the 1990s were focused on tackling symptoms of poverty – and while often recognizing people of color as key “target populations,” still approached [grantmaking] strategy without incorporating a strong analysis of the role racism plays

in economic and educational disparities between people of color and Whites.” (p. 27)

Over the past several years, however, more businesses, nonprofit organizations, and philanthropies are using data to become better informed about the role of race and ethnicity in social and economic and disparities, particularly in urban regions (Daniels, 2015). A growing number of foundations and nonprofit organizations are building into their lexicons and strategy an emphasis on historical inequality, racial equity, and racial justice in their grantmaking, programs, and services (Daniels, 2015). Nationally, the philanthropies leading this charge include the Hill-Snowden Foundation, the Annie E. Casey Foundation, the W.K. Kellogg Foundation, the Hyams Foundation, and most recently the Ford Foundation, which in 2015 announced a sea change shift in its funding priorities to focus exclusively on inequality (Walker, 2015). Several place-based, community, and family foundations across the country (e.g., Meyer Memorial Trust in Oregon, San Francisco Community Foundation) are also exploring how to incorporate racial and ethnic equity lenses in their work, as well.

It is critical to explore racial justice philanthropy in the context of the power imbalance between foundations and the communities they serve. Quiroz (2014) explained that the way foundations design and conduct grantmaking often reinforces racial inequities, favoring organizations that have benefited from white privilege through a history of white leadership. Quiroz (2014) observed:

“Foundations are not structurally accountable to our communities, yet have tremendous influence over our collective future by dictating which organizations, issues and/or strategies will be funded. This is ultimately racialized given that much of power within philanthropy is still White, wealthy and insulated.” (p.44)

While there are case studies detailing the changes in process and delivery of services that some of the above foundations and other nonprofits undertook in order to adopt a racial equity lens in their work (e.g., some foundations ask different questions in grant applications to make them more accessible to a broader group of people), there is little analysis or research on whether a deeper culture shift occurred within the organization that helps or hinders success in implementing racial equity strategies. Moreover, there are few resources for best practices in building an organizational culture conducive to implementing programs with a racial equity focus.

Purpose

The purpose of this study is to conduct action research to develop a racial equity stance at the Eugene and Agnes E. Meyer Foundation in Washington, DC. A racial equity stance refers to an articulation of a vision, values, assumptions, and goals asserting an organization's point of view about racial equity. In addition, this study will also examine the role of cultural competence in supporting the development of a racial equity stance.

Undergirding the impetus for this research is a desire to understand whether organizations can successfully engage in racial equity work without making substantial changes in their organizational culture and without developing cultural competence. This research is also fueled by many questions I have explored over the past several years of my professional life: Does cultural competence have to be present in an organization's internal operations for it to impact external work? How does an organization's culture help or hinder its ability to operate in profoundly different ways? What are the key capabilities an organization needs to possess to advance racial equity? And how does the organization go about developing or strengthening those capabilities?

Background

This research aims to add to the body of work devoted to this topic and these questions by providing a case study of the Eugene and Agnes E. Meyer Foundation—a Washington, DC based organization that recently committed to join the racial equity conversation and work.

About the Meyer Foundation

Founded in 1944 by financier and *Washington Post* publisher Eugene Meyer and his wife Agnes, a respected writer and activist, the Meyer Foundation is one of the largest and oldest philanthropies focused on the Washington, DC region. The Meyers established the foundation with a broad charter to address poverty and the plight of low-income and poor people in Washington, DC and surrounding neighborhoods. Since its founding, the Meyer Foundation has maintained this orientation and commitment to anti-poverty efforts and has operated under a long-held belief that community change is best advanced by supporting community-based nonprofit organizations and their leaders.

Between 2010 and 2015 the foundation advanced its mission to make lasting changes in the lives of low-income people through grantmaking across four program areas: education, healthy communities, economic security, and a strong nonprofit sector. They also developed a comprehensive capacity-building program for its grantees. In 2014, under the guidance of its new CEO, the Meyer Foundation launched a strategic planning process to better understand the long-term impact it hoped to have in the community it serves. After months of research and hundreds of conversations with key stakeholders, the foundation made a move to shift its grantmaking focus from effecting change in the lives of individuals to tackling more systemic and long-entrenched

community-level challenges; a move that will transition the foundation's grantmaking strategy to seek transformative change in the root causes of poverty rather than addressing its symptoms (Goren, 2015).

Over the course of its planning process, the foundation staff realized that they would not be able to effectively address the root causes of poverty without also acknowledging structural racism and developing a strategy to address the racialized outcomes in the Washington, DC region. Such a shift in practice is not nominal and implementation requires more than simply hiring diverse program staff with expertise in issues of race, equity, and equality. Practitioners in the field of racial equity and leaders in the philanthropic movement to advance equity posit that, unlike other shifts in grantmaking strategy, adopting a racial equity lens requires foundations to not only consider what new nonprofits or different types of organizations it will fund but examine how it engages with the community, the process it uses to make decisions about what to fund, and how it approaches partnership. To do this, foundation staff are charged with developing self-awareness of their individual behaviors and mental models as well as their organization's culture and processes. Further, they need to explore whether that culture and those processes serve to advance to racial equity or, in fact, reinforce and perpetuate structural racism.

Significance and Application

The racial equity conversation is a conversation about power (who has it, who doesn't have it) and human dignity. In the social sector, institutional philanthropy possesses an abundance of power and privilege in the form of access, connections, visibility, and wealth that was often accumulated over generations relative to the

community it endeavors to serve. Inherent in this power is the ability and potentiality to directly and indirectly control community outcomes by the decisions foundations make and what they choose to fund. Sometimes I illuminate the power dynamic conundrum with this provocative question: Why are foundations set up “in perpetuity?” If the goal of philanthropy, beyond the sustainment of the arts, were to eradicate social challenges, would that not argue for ‘spending down,’ that is, expending all monetary resources within a specified amount of time? In some ways, the ‘in perpetuity’ practice contains an *a priori* assumption that social problems will always exist and that it is philanthropy’s role to be society’s perennial savior. This may have elements of paternalistic thinking and could result in practices that reinforce structural racism. By looking at how these historical dynamics play themselves out in current foundation culture, we can better develop strategies to shift philanthropy away from self-defeating actions towards fulfilling the promise of philanthropy. By acknowledging this fact and focusing on equity, diversity, and equality, we can attempt to balance the power imbalances, both in the social sector and in society at large.

Personally, my goal for this study is to put forward a call to action and motivate philanthropic leaders (C-suite or otherwise) to broaden their awareness of the structures around us that perpetuate and exacerbate poverty, lack of opportunity, and the increasing marginalization of communities of color. My hope is that foundation staff (and I include myself in this group) will regularly examine their understanding about the intersectionality of race and poverty and develop practices to increase self-awareness of bias and the various cultural meanings we carry that inform our everyday actions as well as our grantmaking decisions. As institutions that inherently have significant power and

privilege in communities, it is my belief that foundation staff are obligated to do this reflective work. While foundation staff have deep expertise and nuanced understanding of their issue areas, decision-making is still informed by personal interpretations and experiences. From a practical and moral standpoint, my hope is that this research will lead to smarter, better informed grantmaking, and partnerships that lead to tangible increases in opportunity and positive changes for marginalized and oppressed communities.

Walking in tandem with the potential professional significance of this work is a personal inquiry. As a black woman working in a field that is predominantly composed of white people, especially at leadership levels, borne by white culture, has direct ties to white power and privilege, (and, honestly, a history of paternalism), I have a definite point of view, which informs this study. I have spent much of my tenure in philanthropy reflecting on how foundations mitigate their position of relative power. This is often exhibited in foundations' espoused value of humility and stated recognition that solutions reside in community knowledge. I've wondered whether anything about those efforts are disingenuous (the foundation still gets to decide which solution gets funding) and an outgrowth of white guilt, generated from place of desiring absolution for power and privilege. By focusing on mitigating the power dynamic, I have wondered if philanthropy is reinforcing "us versus them" mindset, rather than focusing on co-creating a reality in which a power imbalance does not exist. Does philanthropy's value around humility result in self-imposed barriers that limit the ability of those of us working in the field to be authentic community partners? What could transpire if philanthropy chose to acknowledge and face the genesis of its privilege? If we can understand the process by

which one foundation shifted its racial equity stance, can we learn, distill and disseminate strategies other foundations can use to examine and shift practices as well.

In a controversial blog post, Metta (2015) stated: “White people are in a position of power in this country because of racism. The question is: Are they brave enough to use that power to speak against the system that gave it to them?” (“I, Racist,” para. 57). This quote and call to action resonate with my experience working in philanthropy. And I have hope that philanthropy is up to the challenge. The research for this thesis was conducted during a time in the United States’ history when its residents would wake up almost every day to news headlines about police shootings of unarmed Blacks and Latinos/as—a time in which daughters, sons, fathers, mothers, sisters, and brothers were memorialized by hashtags on social media. A period when segregation and racial disparity would be highlighted by natural disasters like Hurricane Katrina and events like the Flint, Michigan water crisis. And a time when heightened racial tensions reached a fever pitch during a hyper-racially charged presidential election. As mentioned above, the urgency of the racial equity conversation is not new, but as a nation we are running out of excuses for why it persists.

Summary

Chapter 1 provided socio-political context for the study and discussed the role philanthropy and the nonprofit sector have addressed issues of race and inequality. This chapter proposed a research purpose: an action research project to develop a racial equity stance at the Eugene and Agnes E. Meyer Foundation. This chapter also introduced the concepts of cultural competence and organizational capacity to develop a racial equity

stance and pursue racial justice. Finally, I identified my personal and professional explanations for the significance of this research.

Chapter 2 provides a review of the literature on the study topic and elements in the framework for developing cultural competence, discusses systemic culture change processes related to diversity, equity, and inclusion, and includes a review of literature on racial equity and justice in the philanthropic sector.

Chapter 3 offers an overview of the study methods and design.

Chapter 4 presents a narrative overview of the findings of the study and describes the data collection results.

Chapter 5 provides a discussion and interpretation of the research findings and conclusions and includes limitations to the study. Suggestions for further research are also made.

Chapter 2: Literature Review

The purpose of this study is to conduct action research to develop a racial equity stance at the Eugene and Agnes E. Meyer Foundation in Washington, DC. To address this topic, this chapter begins with a list of core concepts and definitions to aid in the review of this study. This literature review introduces the concept of racial equity, presenting the concept as an outgrowth of long and rich history in the United States around diversity, inclusion, and equality research and initiatives. In addition, racial equity is defined in the context of and as a solution to structural racism.

This chapter next explores the evolution of diversity and inclusion efforts, including the rationale for the importance of increasing diversity in the workplace and other public institutions and how the functional definitions of strategic approaches to diversity have correspondingly evolved over time. The effectiveness or inadequacy of the various approaches presented is also discussed. Following, this chapter presents a review of cultural competence as an organizational capability (key to the success of diversity and inclusion initiatives) and describes a model for developing cultural competence.

Building on the context set in Chapter 1, this literature review takes a deeper look at the relationship between organized philanthropy, diversity, and inequality. The chapter concludes with a review of literature and philanthropic trade journals with respect to the field's current thinking and practices around grantmaking and racial equity.

Core Concepts and Definitions

The concepts of equality, equity, diversity, and inclusion are frequently misunderstood. To ensure a common understanding of these terms, operational definitions have been established for this study in Table 1.

Table 1.
Operational Definitions

Term	Operational Definition
Discrimination	The unequal treatment of members of various groups based on race, gender, social class, sexual orientation, physical ability, religion and other categories.
Diversity	Diversity includes all the ways in which people differ, and it encompasses all the different characteristics that make one individual or group different from another. It is all-inclusive and recognizes everyone and every group as part of the diversity that should be valued. A broad definition includes not only race, ethnicity, and gender — the groups that most often come to mind when the term "diversity" is used — but also age, national origin, religion, disability, sexual orientation, socioeconomic status, education, marital status, language, and physical appearance. It also involves different ideas, perspectives, and values.
Ethnicity	A social construct that divides people into smaller social groups based on characteristics such as shared sense of group membership, values, behavioral patterns, language, political and economic interests, history and ancestral geographical base.
Equality	The state of being equal, particularly in status, rights and opportunities
Inclusion	Authentically bringing traditionally excluded individuals and/or groups into processes, activities, and decision/policy making in a way that shares power.
Implicit bias	Also known as unconscious or hidden bias, implicit biases are negative associations that people unknowingly hold. They are expressed automatically, without conscious awareness.
People of Color	An umbrella term used to describe the common experience of marginalized groups.

Power	The ability to get what you want. This is a neutral good nor bad but a tool towards an end goal.
Race	A political construction created to concentrate power with white people and legitimize dominance over non-white people.
Racial equity	Often used interchangeably with racial justice, racial equity refers to the condition that would be achieved if one's racial identity no longer predicted, in a statistical sense, how one fares.
Racial justice	The proactive reinforcement of policies, practices, attitudes and actions that produce equitable power, access, opportunities, treatment, impacts and outcomes for all.
Racism	Individual, cultural, institutional and systemic ways by which differential consequences are created for groups historically or currently defined as white being advantaged, and groups historically or currently defined as non-white (African, Asian, Hispanic, Native American, etc.) as disadvantaged.
~Internalized racism	The situation that occurs in a racist system when a racial group oppressed by racism supports the supremacy and dominance of the dominating group by maintaining or participating in the set of attitudes, behaviors, social structures and ideologies that undergird the dominating group's power.
~Individual racism	The beliefs, attitudes, and actions of individuals that support or perpetuate racism. Individual racism can be deliberate, or the individual may act to perpetuate or support racism without knowing that is what he or she is doing.
~Institutional Racism	The ways in which institutional policies and practices create different outcomes for different racial groups. The institutional policies may never mention any racial group, but their effect is to

	create advantages for whites and oppression and disadvantage for people from groups classified as people of color.
~Interpersonal racism	Racism that occurs between individuals. Once we bring our private beliefs into our interaction with others, racism is now in the interpersonal realm.
~Structural racism	The normalization and legitimization of an array of dynamics – historical, cultural, institutional and interpersonal – that routinely advantage Whites while producing cumulative and chronic adverse outcomes for people of color.
Privilege	Unearned social power accorded by the formal and informal institutions of society to all members of a dominant group (e.g. white privilege, male privilege, etc.). Privilege is usually invisible to those who have it because we're taught not to see it, but nevertheless it puts them at an advantage over those who do not have it.
Structural Racialization	The dynamic process that creates cumulative and durable inequalities based on race. Interactions between individuals are shaped by and reflect underlying and often hidden structures that shape biases and create disparate outcomes even in the absence of racist actors or racist intentions. The presence of structural racialization is evidenced by consistent differences in outcomes in education attainment, family wealth and even life span.
White Supremacy	White supremacy is a historically based, institutionally perpetuated system of exploitation and oppression of continents, nations and peoples of color by white peoples and nations of the European continent; for the purpose of maintaining and defending a system of wealth, power and privilege.
*This table is adapted from Racial Equity Tools and Western States Center resources.	

Introducing Racial Equity (It is not the same as equality)

With the landmark Supreme Court cases in the 1950s and '60s ended segregation in public schools, ostensibly ended “Jim Crow” in the South, made “equality” a household word, and put into place protective legislation for minorities, a large segment of the United States population declared the Civil Rights Movement a victory. Another segment of the population further declared racism ‘over’ especially given the election of President Barack Obama, the country’s first African-American president (Alexander, 2012). However, significant gaps in opportunity, health, educational attainment, and financial security between Whites and Blacks persist. Some areas of the country are even more segregated than they were in the 1950’s (GAO: Government Accountability Office, 2016). These disparities, which fall along racial lines, suggest that the effects of racism are more insidious than first thought.

It is important to make the distinction between equality and equity. Equality refers to opportunity whereas equity refers to outcomes (Racial Equity Tool Kit). In many respects, the Civil Rights Movement greatly improved the state of inequality and access to opportunities expanded to include many racial, ethnic, and religious groups that were previously excluded. The Civil Rights Act of 1964 and the establishment of the U.S. Equal Employment Opportunity Commission (EEOC) in 1965 are prime examples. Upon signing the Civil Rights Act, President Lyndon B. Johnson is quoted as saying:

“[O]ur generation of Americans has been called on to continue the unending search for justice within our own borders. We believe that all men are created equal. Yet many are denied equal treatment. We believe that all men have certain unalienable rights. Yet many Americans do not enjoy those rights. We believe that all men are entitled to the blessings of liberty. Yet millions are being deprived of those blessings-not because of their own failures, but because of the color of their skin. ... But it cannot continue. Our Constitution, the foundation of our Republic, forbids it. The

principles of our freedom forbid it. Morality forbids it. And the law I will sign tonight forbids it.” (Berrien, 2014, para. 4)

By providing for equal opportunity, the Civil Rights Act of 1964 and the EEOC indeed are ‘wins’ in the fight against racism. However, equal access and opportunity do not necessarily lead to equal, or positive, life outcomes. With that fact in mind, it is important to take a step back and discuss the different forms of racism, as they influence life outcomes.

Individual racism (holding discriminatory beliefs based on perceived racial differences) and interpersonal racism (discriminatory or bigoted actions towards a person of color or racial minority) are commonly understood. (Racial Equity Tools, glossary). Over time, as an outgrowth of the Civil Rights Movement and subsequent policy changes, it became socially inappropriate to be ‘racist’ or to hold discriminatory beliefs in mainstream culture (DiAngelo, 2011). Being called ‘racist’ was taken as an insult, often prompting responses such as: “I’m not racist. I don’t see color.” In other words, “Skin color is of no importance and has no influence on my personal beliefs and actions.” This phenomenon, which is commonly referred to as “colorblindness,” has received attention by researchers and thought leaders interested in raising awareness that colorblindness is in and of itself a form of racism and has the potential to obfuscate other forms of racism, such as institutional racism and systemic racism (Alexander, 2012; Bonilla-Silva, 2003; Johnston, 2012).

Institutional racism refers to the ways in which “institutional policies and practices create different outcomes for different racial groups. The institutional policies may never mention any racial group, but their effect is to create advantages for Whites

and oppression and disadvantage for people from groups classified as people of color” (Racial Equity Tools, glossary, institutional racism).

Structural racism (also used interchangeably with systemic racism) is the “normalization and legitimization of an array of dynamics – historical, cultural, institutional and interpersonal – that routinely advantage Whites while producing cumulative and chronic adverse outcomes for people of color” (Racial Equity Tools, glossary, structural racism). Equality presupposes that all people should be treated equally; equity is a state in which institutional and structural racism no longer exist.

Colorblindness and “new racism”

Bonilla-Silva (2003) identified four elements in the colorblind framework to explain the persistence of racial inequality in the United States. Combined these elements serve to rationalize racial disparities and reinforce deeply held and socialized beliefs about (in)equality as well as legitimize the mindset that all people have an equal opportunity to succeed:

1. ***Abstract liberalism***: involves using ideas associated with political liberalism (for example, equal opportunity) and economic liberalism (for example, choice) in an abstract manner to explain racial matters.
2. ***Naturalization***: allows white people to explain away racial phenomena by suggesting they are natural occurrences.
3. ***Cultural racism***: relies on culturally based arguments to explain the standing of minorities in society.
4. ***Minimization of racism***: suggests discrimination is no longer a central factor affecting minorities’ life chances. (Bonilla-Silva, 2003, p.74-96)

It is within this deeply held paradigm that some people view policies such as affirmative action, institutions such as Historically Black Colleges and Universities (HBCUs), and organizations like the National Association for the Advancement of Colored People (NAACP) as unfairly advantaging some groups of people over others (Martin, 2007). Each of these was created as a strategy to ameliorate systemic racism.

Process of Racialization and Problematizing “People of Color”

As noted earlier, the term ‘people of color’ is an imperfect umbrella term used to describe the common experience of marginalized groups (Racial Equity Tools, glossary, people of color). Many immigrant groups coming to the United States, particularly from places outside of western Europe, experience the effects of structural racism differently. For example, viewing the U.S. national discourse on racism as a black-white dichotomy in which they are not always reflected (Abrego & Gonzales, 2010; Cline & Necochea, 2010; Kilty & Vidal de Haymes, 2008). Over the course of our country’s history different groups of immigrants have been assigned to the broad categories of white (European immigrants) or ‘of color’ (Latin American, African, Asian-Pacific Islander, Middle Eastern immigrants). While the experiences of marginalized groups of people have differed widely, there are numerous important parallels in experiences that stem from race-based discrimination and the racialization of citizenship, immigrant status, labor, criminalization, religion and others. With this historical and current context in mind, the term structural racism describes the prevailing systems, beliefs, and behaviors that negatively affect all racially and ethnically marginalized groups (Racial Equity Tools, glossary, structural racism).

Re-inviting Diversity to the Conversation

Practitioners in the field of diversity, equity, and inclusion (DEI) have been in a decades long conversation about the importance of diversity training, an industry that gained extreme visibility and experienced high demand beginning in the early 1980s (Vaughn, n.d.), as well as the inadequacy of these trainings in the broader universe of anti-racism work (e.g., Awbrey, 2007; Bassett-Jones, 2005; Bennett, 2004; DiTomaso, Parks, & Yancey, 2007; Ely & Thomas, 1994; Ely & Thomas, 2001; Herring, 2009). Rogers (2003) posited: “Although diversity training may make good business sense, the model falls terribly short of the comprehensive racial justice approach required for progressive social change” (p. 6). Embedded in diversity training approaches is a goal of prejudice reduction as well as an operating belief that racism is the result of personal actions (e.g., stereotyping, discrimination, etc.). Diversity training does not often take on larger societal systems of oppression or systemic racism. Rogers (2003) also offers this example:

“The case of Amadou Diallo, an unarmed black man shot 41 times by four white New York City Police officers (all of whom were acquitted), illustrates the difference between these two views. While a diversity approach might pursue sensitivity training for the officers, a racial justice perspective would hold the entire criminal justice system accountable and demand systemic change.” (p.6)

As the DEI field placed greater emphasis on social change, diversity training has been somewhat minimized, placed in the custody of human resources departments as a function of ensuring compliance with employment regulations and improving workplace environments. However, it is important to not lose sight of diversity, even as demand diversity training decreases. Acknowledging, accepting, and understanding diversity is key to effectively advance racial equity (Rogers, 2003). The term “identity politics”

gained increasing popularity during the 2016 U.S. presidential election—a term that criticizes focusing on and highlighting people’s differences and diversity, as it serves to divide the country rather than unify it (Leondhart, 2016; Lilla, 2016). Minimizing difference, however, obscures the reality that different cultural groups fare differently in society, a counterfactual argument to the basis of racial equity (Bennett 1993; Bonilla-Silva, 2003).

The Business Case for Diversity and Inclusion

The literature on diversity is vast. DiTomaso, Post, and Parks-Yancey (2007) define workforce diversity as “the composition of work units in terms of the cultural or demographic characteristics that are salient and symbolically meaningful in the relationships among group members” (p. 473). Several authors have researched diversity in terms of the benefits on organizational outcomes and work group processes (Scott, 2011; Ely & Thomas, 2001; Mutz & Mondak, 2006). This “value-in-diversity” argument makes a business case for diversity, positing that a diverse workforce leads to better business results (Ely & Thomas, 2001; Herring 2009; Mutz & Mondak, 2006).

Just as researchers posit that diversity will ultimately have a positive impact on organizational outcomes (Ely & Thomas, 2001; Scott, 2011; Mutz and Mondak, 2006), a cadre of other researchers highlight that the organizational benefits of diversity are hard to obtain (Roberson, 2004; Scott, Heathcote, & Gruman, 2011; Tapia, 2009). Studies point to findings that increasing workplace diversity may not always achieve a positive impact on intergroup relations or that diversity may even have detrimental effects by creating conflict or challenging social cohesion (Martinez et. al, 2013; Rea, Neuheiser, & Olson, 2015; Skerry, 2002).

In response to skeptics of the value-in-diversity framework, proponents of diversity argue that too often organizations pursue diversity goals (e.g., setting benchmarks for the demographic composition of staff) yet stop short of intentionally integrating that diversity into the broader organizational culture and in key decision-making processes (Roberson, 2004; Scott, Heathcote, and Gruman, 2011; Tapia, 2009). Scott, Heathcote, and Gruman (2011) believe that there is such complexity in the relationship between diversity and organizational outcomes, that “focusing purely on diversity may lead to disappointing results” (p. 750). Tapia (2009) provided an explanation for why diversity initiatives fail, premising that “diversity” is the mix while “inclusion” is making the mix work. Tapia (2009) wrote:

“Many diversity best practices have focused on bringing those who are different in the door. Many of these efforts have been quite successful, and companies have achieved diversity – the mix. But in many places, the mix is not working well. We end up with diversity without inclusion. Here, diversity’s promise – that greater diversity leads to greater innovation and profitability – dies” (p.12).

Scott, Heathcote, and Gruman (2011) argue that diversity on its own will not necessarily lead to positive organizational outcomes: “an inclusive organizational culture that embraces the idea of diversity in all actions and activities is the force that creates positive outcomes” (p. 736). Roberson (2004) viewed inclusion as a fundamental human resource practice, crucial in fostering a culture that not only embraces diversity but thrives on it. Scott, Heathcoat, and Gruman (2011) further this argument: “For example, in an organization with an inclusive culture, diversity will be considered a core competency in performance appraisal, managerial orientation, and training... Thus, an inclusive culture demonstrates value for all employees, as human resources practices are aligned with and supportive of diversity” (p.739-741).

Cultural Competence

Just as there is substantial research on workplace diversity and inclusion, there is growing research on developing cultural competence as a core organizational strategy (e.g., Clark 2000; Doutrich 2006; Goode, Jones & Mason 2000; Lister 1994; Mays 2002; Purnell 2002). Cross (1989) developed a five-pronged framework for cultural competence, which included: 1) value placed on diversity; 2) capacity for cultural assessment; 3) understanding of dynamics in intercultural interactions; 4) institutionalizing culture knowledge; and 5) developing adaptation to service delivery, reflecting an understanding of cultural diversity. Building off this framework, the National Center for Cultural Competence at the Georgetown University Center for Child and Human Development states that culturally competent organizations:

- Have a defined set of values and principles, and demonstrate behaviors, attitudes, policies, and structures that enable them to work effectively cross-culturally.
- Have the capacity to 1) value diversity; 2) conduct self-assessment; 3) manage the dynamics of difference; 4) acquire and institutionalize cultural knowledge; and 5) adapt to diversity and the cultural contexts of communities they serve.
- Incorporate the above in all aspects of policy-making, administration, practice and service delivery, systematically involve consumers, families and communities. (NCCC: Curricula Enhancement Module Series, n.d.)

Implementation of cultural competence models have been substantially documented across several industries, including health care (Betancourt, Green, & Carillo 2002), social services (Olavarria, 2009), youth development (Friedman, 2014), higher

education (Ahmed et al. 2011), and teacher training (Seeberg & Minick 2012).

Researchers often call out capacity for self-awareness, understanding and acknowledging implicit bias, and intercultural sensitivity as pivotal to the success of culturally competent organizations (van Driel & Gabrenya Jr. 2013).

Capacity for Self-Assessment – Understanding “Whiteness”

Capacity for self-awareness and self-reflection are key attributes to increasing cultural competence and expanding one’s worldview. According to Bennett (1993), it is important to move away from an ethnocentric reality to one that acknowledges diversity of experience. In the context of racial equity, capacity for awareness of one’s ascribed and described identity. For White people, this often includes unpacking what it means to be “white.” McIntosh (1988) and Tatum (2003) are pioneers in the field of racial identity. McIntosh’s (1988) calls out 50 examples of the daily effects of white privileges. Some examples include: “I do not have to educate my children to be aware of systemic racism for their own daily physical protection,” (p.1) “Whether I use checks, credit cards or cash, I can count on my skin color not to work against the appearance of financial reliability,” (p. 1) and “I can choose blemish cover or bandages in ‘flesh’ color and have them more or less match my skin,” (p.2). Tatum (2003) examined racial identity, self-segregation, and the racial divide using real-life, relatable case studies and research.

Implicit Bias

Implicit bias can undercut the effectiveness of diversity because it is hidden to the people holding the bias. Implicit bias can also perpetuate or even exacerbate discrimination and negative race-based outcomes. Over the past twenty years, numerous scholars have researched the impact of implicit bias (sometimes referred to “unconscious

bias”) as it relates to race in such areas as policing (e.g., Goff and Kahn, 2012; Manning, 2006; Mosher, 2011; Parsons, 2008; Smith et. al., 2006; Warren, Tomaskovic-Devey, Rojeck, Rossenfeld, & Ducker, 2012; Weitzer, 2000; Weitzer & Tuch, 2005), jury selection (e.g., Anwar, Bayer, & Hijalmarsson, 2012; Barrett, 2007; Hosticka & Mitchell, 1976; Norton, Sommers & Brauner, 2007), and juror decision-making (Chadee, 1996; Fukurai, 1996; Kammelmeier, 2005; Sommers, 2007). Exploring the influences of negative racial associations, these studies present significant data showing the relationship between racial bias and discriminatory practices in the United States criminal justice system.

Additionally, several researchers have explored the effects of racial bias in health care (Blair, Steiner, and Hanratty, 2014; Chapman, Kaats, & Carnes, 2013; Williams & Wyatt, 2015) and educational outcomes (Leventhal-Weiner & Wallace, 2011; Michelson, 2003; Riegle-Crum & Humphries, 2012). These studies highlight how perceptions of race can lead to unevenness in medical care and classroom instruction, which then have the potential for exacerbating racial disparities in health and education.

Banaji and Greenwald (2013) elevated the conversation about implicit bias by publishing evidence for its existence as well evidence for its implications, writing: “Implicit bias may operate outside of awareness, hidden from those who have it, but the discrimination it produces can be clearly visible to researchers, and almost certainly also clearly visible to those who are disadvantaged by it” (p. 209). Greenwald (1994) developed the Implicit Association Test (IAT) through which survey respondents would answer a series of questions to indicate and predict automatic preferences and associations. The test seeks to illuminate individuals’ implicit preferences for and

attitudes towards race, gender, age and other sociological demographics. Findings published in 2009 showed that almost 75% of the nearly 4 million people who took the Race IAT received scores that revealed automatic White preference (Greenwald, Poehlman, Uhlmann, et al, 2009). Banaji and Greenwald (2013) also found that IAT scores correlated moderately with discriminatory judgments and behaviors.

Intercultural Sensitivity

Bennett and Bennett (2002, 2004 and 2011) have been at the forefront in researching intercultural sensitivity. Bennett's (1993) Developmental Model of Intercultural Sensitivity (DMIS) was created as a framework to explain observed and reported experiences of people in intercultural situations. The DMIS has six stages: 1) denial, 2) defense, 3) minimization, 4) acceptance, 5) adaptation, and 6) integration. The first three stages are 'ethnocentric,' meaning that one's worldview is central to their reality. The final three stages are 'ethnorelative,' meaning that one views their cultural experience in the context of other cultures. "The underlying assumption of the model is that as one's experience of cultural difference becomes more sophisticated, one's competence in intercultural relations increases" (Bennett & Bennett, 2004, p. 152).

Philanthropy, Diversity, and Cultural Competence

Although implementation of cultural competence models has been documented across several industries (Blair, Steiner, and Hanratty, 2014; Chapman, Kaats, & Carnes, 2013; Williams & Wyatt, 2015; Leventhal-Weiner & Wallace, 2011; Michelson, 2003; Riegle-Crum & Humphries, 2012), there is limited research on organizational cultural competence in foundations. However, many authors and thought leaders in the field of philanthropy have written numerous articles on issues of diversity in philanthropy

(Cohen, 2015; Kasper, Ramos, & Walker, 2004; Pittz & Sen, 2004)—in particular, philanthropy’s problematic understanding and treatment of race (Aguilar, 2008). The Applied Research Center (now called Race Forward) published a study which found that “grants to communities of color fell from a peak of nearly 10 percent of all grants in 1998 to 7 percent in 2001” (Pittz & Sen, 2004, p. 4). Other think tanks corroborate these findings. For example, the National Committee for Responsive Philanthropy estimates that 10 percent of philanthropic dollars reach the poor and underserved. The Greenlining Institute released a report in 2006 that found 3.6% of grants in 2004 were invested in organizations led by people of color.

Admittedly, it is challenging for these researchers to compile these data (and many foundations oppose their validity) primarily due to the challenge of getting standardized data from foundations on their giving. In 2008, to obtain more reliable data, California legislators introduced The Foundation Diversity and Transparency Act (A.B. 624) that requires foundations with assets of \$250 million or more to report basic diversity data on an annual basis. However, after months of pushback from foundation leadership across the country, the bill was killed and a compromise was brokered. While there are many for and against Op-Eds on A.B. 624, the subsequent compromise, and what that means for the state of philanthropy, the debate did elevate the importance of race and diversity in the field of philanthropy and forced foundations to respond to the issue in some way.

To continue increasing awareness and advocating for why foundations should pay greater attention to race and diversity, researchers have surveyed and studied board and staff diversity within foundations and have written about the tie between diversity in

foundations and investing in communities of color (e.g., Burbridge et. al 2002; McGill, Bryan, & Austin 2008; Wittstock 1998). This research generally falls into the categories of increasing diversity to be more responsive and understanding of the communities they serve, the importance of diversity in teams and decision-making and strategies for developing inclusive cultures.

As noted earlier, there has been some success in making a business case for the merits of diversity in the workplace; however, several of the market forces that argument is predicated upon do not translate to philanthropy. Davis (2009) attempted to draft a business case describing JPMorgan Chase Foundation approach to diversity into its grantmaking practice:

“While all of the communities we serve certainly share some common challenges in this economic environment...their market dynamics and cultures are vastly different. Our company, and by extension, the JPMorgan Chase Foundation team, is built around a group of professionals who bring diverse backgrounds and thinking to our work to help us gain access to these differentiated communities. Diversity isn’t just fair; it makes business sense” (p.6).

Davis (2009) goes on to write: “And, just as our team is built around this notion of diversity, our philanthropic strategy focuses on the goal of creating stable and healthy communities that are defined by diversity—whether the metric is ethnicity, race, gender, thought or economics” (p. 6). In this example, Davis takes the company (JPMorgan Chase) value of diversity and extends it as such to the JPMorgan Chase Foundation, however, does not create a full “business case” rationale. The next two sections explore additional rationale for increasing diversity in philanthropy.

Increasing Responsiveness to Communities

According to a 2015 study by the Annie E. Casey Foundation, at least 60% of nonprofit organizations in the United States serve people of color. However, several surveys on nonprofit employment have found that whites lead 9.5 out of 10 philanthropic organizations and only 7% percent of nonprofit chief executives and 18% of nonprofit employees are people of color (Annie E. Casey Foundation, Nonprofit Leadership Alliance, Nonprofit Quarterly, 2015). Kasper, Ramos, and Walker (2004) argue that increasing workplace diversity is key in reducing the unevenness in racial representation in the nonprofit workforce compared to the communities it serves:

“Foundations must be accountable to the communities they serve where diversity is concerned. As national demographics continue to change, expanded diversity can help private and family foundations respond more effectively to resulting shifts in community need” (The Case for Diversity section, para. 11)

Having a more diverse board and staff does not guarantee greater community connection or successful grantmaking in all cases. However, several authors note that developing organizational cultural competence, in addition to increasing workplace diversity, could lead to more sustainable adaptations in organizational strategy and service delivery and minimize the hindering effects of implicit bias (e.g., Doutrich, 2006; Edwards, 2010; Gulati-Partee & Potapchuk, 2014; Tapia, 2009). Kasper, Ramos, and Walker (2004) seemingly concur, positing that “inclusive organizations typically are able to develop greater rapport with diverse community groups, build a better understanding of the issues and avoid counterproductive cultural misunderstandings” (The Case for Diversity section, para. 13).

Creating Inclusive Cultures

Practitioners and scholars from the Rockefeller Philanthropy Advisors and JustPartners, Inc. have built from existing research and have used their experience to highlight the importance and *raison d'être* for focusing on diversity. Kasper, Ramos, and Walker (2004) write:

“Integrating the unique contributions of diversity into an organization's operations should be thought of as a complex and systemic process. Recruiting and hiring diverse staff and board members are not the end of the effort. Many foundations have excelled at bringing in diverse employees, but then stalled in their diversification efforts, leaving the new recruits feeling isolated, unappreciated and unsupported. Becoming more inclusive means little unless it is complemented by conscientious, ongoing hard work to develop a supportive work culture that can retain and use that diversity. Continued emphasis, patience and investment is critical”
(*Ten Principles for Success in Integrating Diversity* section, para. 12)

In addition to aid the process of having more generative conversations about diversity, equity and inclusion, Emarita, Mayer, and Stephens (2006) developed a toolkit to help philanthropy ‘move past the silence’ and negotiate conversations about race.

Strategic Grantmaking

Just as has been observed in the broader industry of DEI, focusing on increasing board and staff diversity and creating inclusive cultures, while important, do not necessarily lead to better strategies and outcomes, especially when those outcomes are related to social change. To address root causes of entrenched social challenges, organized philanthropy has placed greater emphasis on strategic grantmaking, including looking at its work through a systems lens and incorporating elements of targeted universalism. In addition, several foundations have stepped a toe into the waters of anti-racism work, naming structural racism as a real phenomenon that hinders social progress.

Targeted Universalism

powell, Menendian, and Reece (2009) popularized the concept of targeted universalism as a strategy for achieving equity, proposing the provocative question of whether universal programs exacerbate inequality rather than reduce it. powell and colleagues (2009) describe:

“Defined as one of this country’s greatest accomplishments, the Interstate Highway Act of 1956 used federal dollars to subsidize the creation of the suburbs. This was the largest public works project in American history at the time. It gave impetus to waves of migrating middle- and upper-class families to abandon the central cities for the suburbs. At the same time, many downtown regions were surrounded or demolished by massive highway construction, and the revenue generated by these projects did not return to the communities that were losing their churches, schools and homes. The ensuing arrangement of racially isolated urban dwellers and equally racially isolated suburban residents, hastened by the white flight that followed Brown v. Board of Education’s integration mandate, is a pattern we live with today. Simply put, ostensibly universal programs have no less potential to exacerbate inequality than ameliorate it. Treating people who are situated differently as if they were the same can result in much greater inequities” (para. 3).

powell, Menendian & Reece (2009) offer an alternative to universal policies and programs and programs that are designed for specific groups of people. Targeted universalism is an approach that supports the needs of the particular, while reminding us that we are all part of the same social fabric. It rejects a blanket universal and emphasizes identifying a problem, particularly one suffered by marginalized people, proposing a solution, and then broadening its scope to cover as many people as possible.

In the context of philanthropy and grantmaking, researchers and organizations like the D5 Coalition and the Philanthropic Initiative for Racial Equity proposed targeted universalism as a frame through which foundations can develop and evaluate racial equity strategies (Potapchuk & Gulati-Partee, 2014).

Naming Racism and Working with a Racial Equity Lens

Following the ARC publication of “Short Changed” (Pittz & Sen, 2004) and coinciding with the debate around A.B. 624, GrantCraft and the Philanthropic Initiative for Racial Equity (PRE) published a guide for grantmaking with a racial equity lens in 2007. The guide included a tool to help foundations assess their work around race. The publication also offered a definition for a racial equity lens, describing it as having many components, including:

- Analyzing data and information about race and ethnicity
- Understanding disparities—and learning why they exist
- Looking at problems and their root causes from a structural standpoint
- Naming race explicitly when talking about problems and solutions.

In 2009, PRE and ARC released a report on lessons learned from two foundations (the Barr Foundation and the Consumer Health Foundation) that piloted PRE’s Racial Justice Grantmaking Assessment. The report, “Catalytic Change,” included implications for the field and recommendations for other foundations that may look to incorporate a racial justice or racial equity lens into their work. One recommendation was to “move beyond diversity to racial equity” (p. 11). The recommendation continues, explaining:

“Each foundation should establish a shared understanding of race and racism, and come to agreement on racial justice as a core part of its mission, goals, and strategies. This requires moving far beyond a diversity framework, toward a more explicit acknowledgment of the roots of structural racism, its implication for the foundation’s mission, and organizational strategies to advance racial justice” (p. 11).

Moreover, Jung, Potapchuk, Sen & Villarosa (2009) implore leaders to spend more time talking about race and racism at all organizational levels.

Building a Culture Around Equity

Increasingly, practitioners in the field of improving the effectiveness of organized philanthropy are raising awareness on the importance of paying attention to organizational culture. Potapchuk and Gulati-Partee (2014) emphasize the criticality of paying attention to the privilege side of racial equity:

“For foundations to work toward racial equity through their philanthropic investments and leadership, they must shine a light on white privilege and white culture both internally and externally...[it] will prove insufficient to address structural racism or fulfilling the promise of racial justice because they ignore or obscure the other half of the problem” (p. 25).

Potapchuk and Gulati-Partee (2014) offered a series of tools and recommendations to help foundations put white privilege on the table. These tools will be further explored in Chapter 5 as they relate to the findings of this study.

Summary

While substantive literature on diversity and inclusion in the workplace exists, there is limited research on the topic with respect to organized philanthropy. Further, more research is needed to understand whether and how cultural competency impacts organizational approaches and effectiveness in advancing racial equity. As foundations reexamine their strategic framework in the context of racial equity, research on best practices could identify potential attributes or barriers to success in the process of developing such a lens. Finally, there are models for integrating culture competence into organizational strategy; however, due to the relative newness of considering a racial equity stance a fundamental organizational capacity, there is not an analogous model for what it takes to develop a racial equity lens. Chapter 3 offers an overview of the study methods and design.

Chapter 3: Methods

The purpose of this study was to conduct action research to develop a racial equity stance at the Eugene and Agnes E. Meyer Foundation in Washington, DC. This chapter describes the research methods that will be used in this study.

Research Approach

An action research study, inclusive of observation, intervention design and facilitation, semi-structured interviews, and review of assessments and other documents, was used to better understand what it takes to develop a racial equity stance, paying close attention to how an organization leverages cultural competence in the process. Action research “seeks to bring together action and reflection, theory and practice, in participation with others, in the pursuit of practical solutions to issues of pressing concern to people” (Reason & Bradbury, 2001 p.1). Action research was an appropriate method for this study since it aimed to add to a community of practice around philanthropy and racial equity.

The Meyer Foundation engaged the Management Assistance Group (MAG), an external consulting firm with extensive experience in strategic change initiatives at nonprofit organizations and foundations, to support the foundation as it developed a racial equity lens for its internal and external operations; a scope of work that included increasing the organization’s cultural competence as defined in this study. The scope of work for MAG included:

- An organizational assessment, conducted via one-on-one interviews with the board, staff, a select number of external stakeholders, and an organization-wide survey;
- Three board and staff trainings;
- Coaching for senior leadership on the board and staff; and
- A series of action learning projects and task forces, whose purposes will evolve throughout the engagement.

To help manage the process, the Foundation established the Racial Equity Planning Team (REPT), a steering committee composed of four staff members and two board members. Action research is embedded throughout the process, with dedicated moments for MAG and the REPT to reflect on implemented trainings and to adjust future activities. The current study reported on the first eleven months of this initiative: January 2016 – November 2016. During this process, I held multiple roles: project manager, who was the primary point of contact for MAG; team lead for REPT; internal practitioner, monitoring, guiding, and implementing aspects of the change process; and staff participant in the process.

Document Review

Periodically throughout the study period, Meyer board and staff members engaged in trainings, workshops, informal conversations, and task force meetings. These gatherings generated meeting minutes, flipchart comments, and other content, which were collected and analyzed. The Management Assistance Group also conducted an assessment based on their initial interviews and analysis, the findings of which are included in Chapter 4. These documents were analyzed as part of this research project.

Observation

As the lead for the planning team, I recorded observations and notes from brief conversations throughout the study period in journals that was analyzed along with the full complement of the collected data.

Intervention Design and Facilitation

While the Meyer Foundation retained MAG to guide the Foundation during this process, we also sought to build internal capacity to sustain the work. Along with a planning team, I worked with the MAG team to design the three organization-wide trainings. In addition, I designed and facilitated workshops and trainings for Meyer staff intermittently throughout the 11-month study period.

Post-Initiative Interviews

In addition, five 30-minute semi-structured interviews were conducted. Interviewees were drawn from the staff who served on the REPT and/or one of the action learning task forces. The MAG consultants were interviewed as well. The purpose of the interview was to gain a deeper understanding of the dynamics within the organization as well as any barriers, forms of resistance, or recommendations for improvement in the change process. The interviews also provided insight into the change of individual's cultural competence and equity mindset over time. The post-initiative interview questions are outlined below:

1. How has your awareness of issues of equity, culture, power, privilege and other areas (relating to race, socioeconomics, gender, LGBT, oppression, or other categories) changed over the last ten months?

2. What are the most significant dimensions or aspects of a focus on equity, from your perspective: For yourself? For the Foundation? For the region?
3. What new language or terms do you use (or prefer) in your own life and work to describe these dimensions as a result of our racial equity work over the past ten months?
4. How does equity and inequity shape or inform how you currently do your work / perform your role (internal and external to the Foundation)?
5. What has been most challenging about this process so far?
6. What excites you about this process moving forward? What are your hopes for this process in the Foundation? What would you like to see or be proud of as a result of this process?
7. How will the racial equity stance inform the implementation of the Foundation's new strategic plan?
8. What new concerns or fears do you have about this process, now that we've completed the racial equity stance: For yourself? For the organization? For the community and/or the Foundation's partners?

Sampling Methodology

This study used a case study design to observe how an organization institutionalizes cultural competence. The subject of this study was the Eugene and Agnes E. Meyer Foundation, a private philanthropy in Washington, DC. The Meyer Foundation mission, adopted in 2015, is to pursue and invest in solutions that build an equitable Greater Washington community in which economically vulnerable people thrive (www.meyerfoundation.org, n.d.). The Foundation annually awards approximately

\$7 million in grants to more than 150 nonprofit organizations throughout the Washington, DC region. For the purposes of this study, the Washington, DC region consisted of the District of Columbia, suburban Maryland (Montgomery and Prince George’s counties) and Northern Virginia (Arlington, Alexandria, Fairfax County, and Prince Williams County).

Foundation Demographics

Meyer’s staff consists of 17 team members (13 full-time and four part-time). Demographically, the staff is composed of 14 women and three men. There are five people of color on staff and the remaining (12 members, or 70%) are white. The staff positions are outlined below:

- President and CEO, who is supported by an executive assistant
- Vice president for programs and communications, who oversees the program team, which includes one program director, three program officers, a communications manager, a grants manager, and four program assistants
- Vice president for finance and operations, who oversees the operations team, which includes an office manager, a finance manager, and a front desk receptionist.

There are nine members on the board of directors: five men, two of whom are men of color, and four women, two of whom are women of color.

Racialized Outcomes in the Washington, DC Region

The Greater Washington region has a history of discriminatory policies and practices—dating back to colonial times and the formation of Maryland and Virginia as

slaveholding colonies—that have exacerbated and reinforced these racialized disparities (Kijakazi et. al., 2016). A small sampling of these policies includes real estate steering, redlining, and housing covenants that excluded or prevented racial, ethnic, and religious marginalized groups from using, leasing and/or owning property in restricted areas (Kijakazi et. al., 2016). A series of local and national court cases legitimized the reinforcement of such practices, including:

- Torrey v. Wolfes, 1925, which set a precedent in DC for the courts to enforce racially restrictive covenants placed in deeds by developers.
- Corrigan v. Buckley, 1926, which set the precedent nationally for courts to enforce racially restrictive covenants established by groups of neighbors

Housing covenants in the Mount Pleasant neighborhood of Northwest Washington, DC show how the spread of petitions after the decision worked to keep the neighborhood white well into the 1950s (Mapping Segregation, Racially Restrictive Covenants section). Housing covenants and racial exclusionary practices also flourished in the suburbs around the District. For example, public housing developments, like those developed in Greenbelt, Maryland in 1937 for whites-only were segregated as well. Similar racially motivated policies, legislation, and practices in the areas of education, mortgage lending, access to employment, and so on—some remaining in effect until the 1950s and 1960s—combine to reinforce structural racism, leading to the racialized disparities in the Washington, DC region today (Mapping Segregation).

While many of the legally based forms of racial discrimination have been outlawed, the connection between the region’s history and its current context is not incidental but structural and causal (Hendey & Lei, 2016). Tables 2 and 3 show the discrepancies

between white people and communities of color that are seen in the Washington, DC region today—the wealth gap, the education gap, higher incarceration rates, higher unemployment rates, and disparities in health outcomes—can be used as evidence of structural racism. The full report can be found in Appendix E. Other disparities can be found in the rest of the region in the areas of financial security, education and workforce, and housing.

Table 2.

Racialized Disparities in Washington, DC

	Black/African American	White	Latino/Hispanic
Median Income	\$39,000	\$113,000	\$56,000
Graduation Rate	59%	85%	65%
Unemployment Rate	20%	3%	9%
Homeownership Rate	37%	49%	30%
* The above data is sourced from the CFED Family Assets Count report published in 2015.			

Table 3.**Racialized Disparities in the Region**

Assets and Financial Security	Workforce	Housing
<ul style="list-style-type: none"> In Northern Virginia and Montgomery County, white households earn nearly twice as much as both black/African American and Latino/Hispanic households. 	<ul style="list-style-type: none"> In Prince George's County, the unemployment rate for black/African Americans and Hispanic/Latinos is approximately twice as high as it is for whites. 	<ul style="list-style-type: none"> In Montgomery County, the white homeownership rate exceeds that of Hispanic/Latinos and black/African Americans by 23% and 32% respectively.
<ul style="list-style-type: none"> In Prince George's County, median income for white households is approximately \$20,000 more than for Hispanic/Latino households. 	<ul style="list-style-type: none"> The unemployment rate in Arlington County is more than five times higher for black/African Americans than for whites (15% and 2% respectively), and more than three times higher in Alexandria (11% and 3% respectively). 	<ul style="list-style-type: none"> In Alexandria and Arlington County, whites are twice as likely to own homes as both black/African Americans and Hispanic/Latinos.
<p>* The above data is sourced from the CFED Family Assets Count report published in 2015.</p>		

Research Model and Content Analysis

This case study referenced the Cross and colleagues (1989) framework for developing cultural competence and a model for developing a racial equity stance that I developed which informs how the data of this research is presented and analyzed. The Cross and colleagues (1989) framework includes five elements: 1) value placed on diversity, 2) capacity for cultural assessment, 3) understanding of dynamics in intercultural interactions, 4) institutionalizing culture knowledge, and 5) developing adaptation to service delivery, reflecting an understanding of cultural diversity.

Content Analysis

In analyzing the qualitative data collected, I made effort to find similarities, differences, and themes across interviews, meeting observation, survey responses, emails, flip chart notes, and notes from conversations. Several themes emerged across the full data set which are presented in Chapter 4. At the outset of the project, I used the Cross (1989) cultural competence model in the content analysis. Data were categorized to generate common themes that would speak to the model. Once the research project moved beyond cultural competence, as is reported in Chapter 4, I began analyzing themes related to the process the Meyer Foundation was going through and the capacity phase changes that corresponded with the process stages. The presentation of the findings was shared with key leadership at the Meyer Foundation for validity.

Summary

This chapter presented the methods and design used by the researcher. It restated the research purpose, described the rationale for the approach, and provided a discussion of the data collection methods, a description of the action research site and relevant background information. The chapter referenced the Cross (1989) model for developing cultural competence.

Chapter 4: Narrative Overview of Findings

This chapter includes a chronological and narrative re-telling of the project process. Because of the scope of the project and the number of action research cycles, the chronology has been divided into four sections: the kickoff, assessment, and initial implementation (January – May 2016), the first reflection and course correction cycle (May – July 2016), the second phase of implementation (July – August 2016), and the final phase of integration (September – October 2016).

The data reported here have been collected from myriad sources, including: the initial assessment conducted by the Management Assistance Group (MAG), agendas produced for meetings, workshops, and trainings; facilitators' guides for trainings and workshops, session and meeting notes as well as minutes from formal meetings, my journal of observations and reflections over the 10-month period, memos to the board of directors as well as internal memos to staff leadership, flipchart notes, blog posts written by the president and CEO, and notes from one-on-one interviews.

Section 1: January – May 2016

It was a cold January morning and the three of us were huddled in the Conference Room for 8 at the Meyer Foundation's offices in Washington, DC. I had just dialed the conference call number, our board member was already on the line, and we were all silently waiting for our MAG consultants to dial in. Looking around the room, I could see that we all were anxious, excited, curious, and, most of all, ready to launch into a compelling and entirely new body of work for the Foundation. The "three of us" and the board member comprised the Racial Equity Planning Team (REPT)—a newly formed team, brought together to shepherd the organization through the 11-month initiative. We

ensured that the team membership reflected the organization's structure: members included the president and CEO; a member from the Operations Team; and myself, a member of the Program Team as well as the co-lead for the scope of work we were about to undertake.

Kick-Off Meeting

The goal of the kickoff meeting was to revisit the proposal MAG submitted in December 2015, confirm the overarching timeframe of the project, and re-contract with our lead consultants to make sure they had the data and access to staff they needed to begin their work. We also used the kickoff meeting to discuss and plan our approach to conducting a baseline organizational assessment of the Foundation's current capacity for developing a racial equity stance. We decided that MAG would draft the interview protocol and survey instrument, and receive feedback from REPT, before finalizing the two data collection tools. Before the meeting concluded, we confirmed that I was the staff lead on the project and primary liaison between the consultant team and the Foundation staff. The project timeline for this phase can be seen in Table 4.

Table 4.**Project Timeline January – May 2016**

Event	Objectives	Timeframe	Participants
Kickoff Meeting	<ul style="list-style-type: none"> – Confirm the parameters of the project and review the consultant SOW – Define the data collection process – Design and develop the interview protocol and survey instrument 	January 2016	<ul style="list-style-type: none"> – Racial Equity Planning Team – MAG consultants
Assessment & Data Collection	<ul style="list-style-type: none"> – Establish a baseline of participant readiness for and understanding of racial equity through one-on-one 45-minute interviews and a survey 	Jan – Feb 2016	<ul style="list-style-type: none"> – MAG consultants (who conducted the interviews and administered the survey) – 15 staff members & 9 board members were interviewed – 20 survey respondents
Data Analysis	<ul style="list-style-type: none"> – Make sense of the data collected – Begin developing training agenda – Differentiate learning goals and objectives for the board and the staff 	Feb 8 2016	<ul style="list-style-type: none"> – Racial Equity Planning Team – MAG consultants
Board Training	<ul style="list-style-type: none"> – Beginnings of shared understanding around the meaning of racial and ethnic equity – Review the assessment data and reflect on implications for the Foundation’s strategy 	Mar 15, 2016	<ul style="list-style-type: none"> – MAG consultants – 9 board members – President & CEO

	<ul style="list-style-type: none"> – Strengthen capacity and confidence to engage in racial and ethnic equity with courage, trust, and skill – Build pathway forward for continued development 	
Post-Board Training Debrief, part 1	<ul style="list-style-type: none"> – Discuss what went well at the board training, and what areas need further work – Review post-training board survey responses – Develop follow-up and debrief questions for the CEO to use in 1-on-1 conversations with board members 	<ul style="list-style-type: none"> – Racial Equity Planning Team – MAG consultants
Post-Board Training Debrief, part 2	<ul style="list-style-type: none"> – Synthesize learnings from the CEO’s one-on-one conversations to inform next steps 	<ul style="list-style-type: none"> – Racial Equity Planning Team – MAG consultants
Design for Staff Training	<ul style="list-style-type: none"> – Planning and design for board off-site training – Define learning objectives, building on the initial assessment 	<ul style="list-style-type: none"> – Racial Equity Planning Team – MAG consultants
Staff Training	<ul style="list-style-type: none"> – Beginnings of shared understanding around the meaning of racial and ethnic equity – Review the assessment data and reflect on implications for the Foundation’s strategy – Strengthen capacity and confidence to engage in racial and ethnic equity with courage, trust, and skill 	<ul style="list-style-type: none"> – MAG consultants – 15 staff members (including the president & CEO)

Apr 26
2016

	– Build pathway forward for continued develop		
Post-Training Debrief, part 1	– Discuss staff feedback and reactions to the training	Apr 28 2016	– Racial Equity Planning Team (staff only)
Post-Training Debrief, part 2	– Regroup after processing staff reactions – Brainstorm strategies to address staff feedback	May 5 2016	– Racial Equity Planning Team (staff only)
Post-Training Debrief, part 3	– Discuss staff reactions to the training, and present our suggestions for course-corrections	May 9 2016	– MAG consultants – Maegan – President and CEO

Assessment and Data Collection

The methodology for the initial assessment, which was conducted by MAG and appears in full in Appendix B of this study, included a document review, interviews of participants' histories within the Foundation, perspectives on the impetus for the work around racial equity, hopes and fears for the process, and a survey to develop baseline understanding of how well racial equity is infused into the institution. Each member of the board and staff plus one external individual was interviewed for approximately 45 minutes. A total of 24 interviews were conducted. Our intention was to interview four external individuals; however, due to scheduling difficulties, this was not able to occur.

Twenty-one of 23 participants responded to the survey. Sixteen dimensions of institutional ethnic and racial equity were assessed in the survey (see Table 5). For each dimension, survey questions were structured to assess a minimum standard of performance, and respondents were asked to rank each item on a 5-point scale.

Table 5.**Sixteen Dimensions of Institutional Ethnic and Racial Equity**

Mission, vision and values	Collaboration structure, processes and relationships	Partnership and field building	Evaluating and measuring success
Leadership	Vendors	Convening and advocacy	Financial management and analysis
Planning	Grantmaking and engagement with grantees	Communication systems	Analysis on context, history and power
Policies	Capacity-building approaches	Organizational culture and climate	HR and personal accountability

Assessment Findings

The findings of this assessment are comprehensive. Overall participants were “genuinely excited about the potential for this process for deepening knowledge and broadening and deepening the Foundation’s impact” (Meyer Foundation – Organizational Development Equity Assessment Findings, 2016, p. 6). The assessment also found that staff and board members’ experiences and awareness of diversity and equity were significantly varied:

“For some, equity awareness developed either in reaction to or with the support of family. This varied across demographic backgrounds. For others engaging in difference was focused on ‘sameness’ and ‘not seeing color,’ with the notion that ‘seeing color’ was itself a form of racism. This was noted only by white staff and board members” (p.7).

All participants expressed a desire to develop a shared vocabulary of terms (for example, oppression, privilege, and power) and some staff expressed a strong desire to

steer away from using “coded language” that obfuscates racism or paternalistic actions (p.7).

The assessment also found that “a great deal of staff, particularly on the operations side, but not exclusively, did not have a strong sense of how equity might inform their work” (p.8). However, there was desire by nearly all for on-going growth and education. One white staff person noted, “There are many aspects to these issues that require education—mostly education of white people. That might be necessary before we can get to dismantling the structures and the norms that have been created” (p.9). Unsurprisingly, board and staff members alike raised several concerns and cautions to pursuing work on racial equity, including risk-management, organizational culture change, fears about “getting it wrong,” ensuring that all feel safe to participate without compromising organizational culture. Table 6 highlights key areas of concern.

Table 6.

Challenges, Fears, and Concerns about Advancing Racial Equity

Type	Illustration
Embracing Risk	“It’s important for the foundation to have a ‘realistic understanding of risks involved and to embrace the risks.”
Culture Change	“The historical culture at Meyer has been very ‘polite.’ This can be a positive thing. The negative part of this is that things that need to get said, don’t.”
Getting It Wrong	“Lots of people are worried we might say the wrong thing.”
Safety/Belonging in the Organization	“We don’t want anyone to go home feeling like they don’t belong here.”

In addition to the above findings, the assessment process also surfaced numerous potential tensions (or polarities) that the Foundation would need to address or be mindful of during the change process, including 1) the relationship between community constituents and the diversity within the organization; 2) clarifying and calibrating the notion of success; 3) developing capacity in emergent strategy; 4) strategic messaging; 5) the relationship between “race” and “ethnicity;” 6) balancing affective and technical aspects of equity; and 7) bridging the gap between operations and program staff’s different relationship to the Foundation’s overall strategy. Such tensions did indeed surface over the ten-month study period and are addressed later in this chapter (see Table 6).

Training Design: Focus on Education

Board and staff members of REPT and consultants from MAG met virtually via teleconference and a series of emails over a period of several weeks to develop the trainings. This was an iterative process that eventually concluded in a set of learning goals for a five-hour training, an agenda, and pre-reading materials for the participants. When we began designing the trainings, we knew that we planned to provide separate trainings for the board and the staff. The board and staff do not have regular interaction with each other, and we wanted to provide a safe-enough space for difficult conversation—the existing board-staff dynamic would not be conducive to building or tapping into trust. However, we (REPT and MAG) approached training design with the assumption that both the board and the staff would receive and become immersed in similar educational content.

Board Training

The first training was for board members only and occurred on March 15th, 2016 from 10:00 AM – 3:30 PM at an off-site location. The overall objectives of the board training were to begin developing shared understanding around the meaning of racial and ethnic equity, review the assessment findings and reflect on their implications for the Foundation’s strategy development, strengthen capacity and confidence to engage in racial and ethnic equity with courage, trust, and skill, and build a pathway forward for continued development. The full agenda is displayed in Table 7. All nine board members were present; the president and CEO joined the training as well—in part because she is *ex officio* on the board of directors, but also to serve as a witness to what worked and what didn’t work in the training and see our MAG consultants in action.

Table 7.**Facilitator Agenda for Board Training on March 15, 2016**

Activity	Key Points/Objectives	Timing
Welcome, Goals, Agenda Review, and Framing	<ul style="list-style-type: none"> – This training is designed to meet and support the different starting places of awareness – We hope and want people to be of support to each other 	10:00 – 10:15 (15 minutes)
“Ways of Being Together”: Participation Agreements & Norms	<ul style="list-style-type: none"> – Making the room a safe place for: <ul style="list-style-type: none"> ○ for those for whom this is new ○ for those who may be tired of doing the work, holding the space, and fatigued from accommodating – Surfacing misgivings, fears, concerns, feelings, in a way that promotes ownership 	10:15 – 10:30 (15 minutes)
Opening / Warm-Up Reflection	<ul style="list-style-type: none"> – Reflecting on the pre-readings: <ol style="list-style-type: none"> 1) what connections to your own work and life do you see? 2) what is troubling or confusing? 3) what lingering questions do you have?? – 1-2-4-All liberating structure (individual reflection, discussions in pairs, whole group popcorn) 	10:30 – 11:00 (30 minutes)
Training & Discussion	<ul style="list-style-type: none"> – Presentation <ul style="list-style-type: none"> ○ Individual Racism ○ Interpersonal Racism ○ Institutional/Structural Racism – Discussion (12All) 	11:00am -12:00pm (60 minutes)
Lunch 12:00 – 12:30		
Organizational Equity Assessment Review	<ul style="list-style-type: none"> – Overview of the highlights from the data – Questions – Discussion (24All) <ul style="list-style-type: none"> ○ In pairs/trios discuss: what jumps out? What is most important? What is confusing or troubling? 	12:30 – 1:30pm (60 minutes)

Introduction to “Emergent Strategy”	<ul style="list-style-type: none"> – Address the desire to “get it right” and develop comfort with ambiguity – Discuss case study of another foundation adopting an equity stance – Implications of emergence on board governance 	1:30 – 1:45pm (15 minutes)
Now What: What about the foundation’s work will most need to change? What should be our next steps & commitments (individually and collectively)?	<ul style="list-style-type: none"> – Discussion of pre-reading materials and connections to the Foundation’s work – Recap from the assessment; discuss action learning projects and next steps 	1:55 – 3:10pm (15 minutes)
Communications: Initial Priorities Conversation	<ul style="list-style-type: none"> – Build confidence and alleviate anxiety – Elevator speech – Discussion of communications needs 	3:10 – 3:20pm (10 minutes)
Closing Reflections, Evaluation & Adjourn	<ul style="list-style-type: none"> – One sentence or word: <ul style="list-style-type: none"> ○ Where are you now, after a day’s work? ○ What’s still needed? ○ What are your own commitments? 	3:20 – 3:30pm (10 minutes)

What Came Up?

Three major themes emerged from the board training (all of which re-surfaced in other parts of the 11-month process). These themes included: the relationship between individual responsibility and racial equity, the difference and relationship between a judgmental stance towards marginalized people, and seeing the symptoms they experience as a ‘choice,’ and board diversity in terms of demographics. From the board training notes:

“The discussion also turned to questioning the acceptance or embracing of ‘opportunity’ and why this is challenging for some communities and

community members. The issue of ‘learned response’ after centuries or decades of marginalization was also raised, such that lifting oneself by the ‘bootstraps’ is not possible for everyone. The group landed on the need to balance a need for personal responsibility with understanding the experiences of each individual and community.” (p. 2-3)

Board members also raised numerous issues which would require further discussion amongst the board and staff, including: 1) the importance of defining and measuring success as it pertains to adopting a racial equity stance; 2) understanding the local, historic, and current context of equity in the Washington, DC region; and 3) how to tailor messages for multiple types of audiences (for example, the business community, community development organizations, safety net groups that work to increase access to services, etc.) that we wish to speak to and influence.

Reactions to the Board Training

By many accounts, the board training on racial equity was a success, accomplishing several of the objectives and goals in the training design. According to notes from the training, board members found that the explanation of the three levels of racism/equity “help[ed] give a more textured and nuanced understanding of equity and the realities of communities.” The president and CEO reported that board members were “highly engaged”. She also noted that, in her opinion, one of the reasons the day was a success was because, at the start of the day, the board chair (a white male) opened up about his ongoing learning process about issues of race and structural racism. This act of disclosure, acknowledging his unfamiliarity of the subject, along with his bravery in sharing gave permission for other board members to be open as well.

In addition to reflecting on the training notes and our CEO’s observations, I developed a post-training survey to gather anonymized feedback. The survey questions

were disseminated through SurveyMonkey. The CEO also conducted one-on-one meetings with each board member. While we had limited survey responses from the board (only three of the nine board members responded due to scheduling difficulties), the responses we did receive corroborated many of our CEO's day-of observations and information she received during her individual meetings with board members. Three themes emerged: 1) board members found that the training increased their understanding of equity; 2) board members wished there were opportunities to learn more about their board colleagues; and 3) board members had a negative reaction to one of the two consultants facilitating the training.

The reasons behind the desire to learn more about each other was two-fold. In one respect, board members were naming the awkwardness of having conversations about race with people they see only four times a year (and that's if they attend every board meeting, which most board members are unable to do). Secondly, board members expressed that in some moments of the training, they were "walking on eggshells" because they didn't want to offend or say the wrong thing. The negative reaction to the consultant was driven by two concerns: 1) she presented a topic—emergent strategy in foundations—that was poorly received and perhaps mistimed in the learning process; and 2) board members did not feel she was not a good cultural fit with the organization.

Board Training Debrief

The REPT met with our MAG consultants on March 21st, 2016 to synthesize and discuss in greater depth the consultants, CEO's, and REPT board representative's observations of the training and the various forms of feedback we received. We agreed that we needed to develop a plan to respond to the board's desire for more education

around equity, and the CEO and I committed to researching learning activities we could embed in future board meetings.

Staff Training

The objectives of the staff training were the same as the board training: begin developing shared understanding around the meaning of racial and ethnic equity, review the assessment findings and reflect on their implications for the Foundation's strategy development, strengthen capacity and confidence to engage in racial and ethnic equity with courage, trust, and skill, and build a pathway forward for continued development. Table 8 shows the agenda for the staff training. All 17 staff members participated in the training.

Table 8.**Facilitator Agenda for Staff Training on April 26, 2016**

Activity	Key Points/Objectives	Timing
Welcome, Goals, Agenda Review, and Framing	<ul style="list-style-type: none"> – This training is designed to meet and support the different starting places of awareness – We hope and want people to be of support to each other 	10:00 – 10:10am (10 minutes)
“Ways of Being Together”: Participation Agreements & Norms	<ul style="list-style-type: none"> – Making the room a safe place for: <ul style="list-style-type: none"> ○ for those for whom this is new ○ for those who may be tired of doing the work, holding the space, and fatigued from accommodating – Surfacing misgivings, fears, concerns, feelings, in a way that promotes ownership 	10:10 – 10:15am (5 minutes)
Opening / Warm-Up Reflection	<ul style="list-style-type: none"> – Reflecting on the pre-readings: <ol style="list-style-type: none"> 1) what connections to your own work and life do you see? 2) what is troubling or confusing? 3) what lingering questions do you have?? – 1-2-4-All liberating structure (individual reflection, discussions in pairs, whole group popcorn) 	10:15 – 10:45am (30 minutes)
Organizational Equity Assessment Review	<ul style="list-style-type: none"> – Overview of the highlights from the data; focus on tensions and polarities – Discussion (24All) <ul style="list-style-type: none"> ○ In pairs/trios discuss: what jumps out? What is most important? What is confusing or troubling? 	10:45 – 11:45am (60 minutes)
Lunch 11:45am – 12:15pm		
Training & Discussion	<ul style="list-style-type: none"> – Presentation <ul style="list-style-type: none"> ○ Individual Racism ○ Interpersonal Racism ○ Institutional/Structural Racism – Discussion (14All) 	12:15 – 1:35pm (80 minutes)

Now What: What about the foundation's work will most need to change? What should be our next steps & commitments (individually and collectively)?	<ul style="list-style-type: none"> – Recap from the assessment; discuss action learning projects and next steps – Name the <i>pink elephant</i> and <i>hardest equity conundrum</i> to solve 	1:45 – 2:45pm (60 minutes)
Closing Reflections, Evaluation & Adjourn	<ul style="list-style-type: none"> – One sentence or word: <ul style="list-style-type: none"> ○ Where are you now, after a day's work? ○ What's still needed? ○ What are your own commitments? 	2:45 – 3:00pm (15 minutes)

The design process for the staff training was short, given that we only made small modifications from board training design, and those changes were grounded in the board's feedback. For example, we omitted the section on emergent strategy as this did not resonate with the board. We flipped the discussion of the organization assessment and the presentation of the three levels of racism, to ground our conversation in what was resonant for Meyer at that moment. We also made it explicit that we hoped to create a space for people to name "pink elephants" (our consultants' term for naming the unmentionable). We did not, however, make changes to the consultant team because we were curious to see if the staff would have the same reaction as the board to the consultant in question.

Since we felt comfortable with the content of the training, we focused our energies on anticipating dynamics that might surface during the training, and designing containers to mitigate potential hotspots and triggers. We curated each small group discussion to avoid known interpersonal tensions between staff members, and we were intentional about ensuring staff were not in a breakout group with their supervisors.

What Came Up?

Some of the same questions and themes that emerged in the board training showed in the staff training as well. For example, staff spent a significant amount of time talking about issues of power, privilege, and agency. The work of the Foundation is to address social challenges; the question is how does the Foundation accomplish that mission without disempowering or taking agency away from those the Foundation is meant to serve? On the other side of the conundrum, how do we reconcile agency and choice in the context of systemic racism? From the session notes:

“The group noted that there’s an element of “agency” here in relation to what doors are open or can be opened and what opportunities are and are not available for some communities. For communities who have been historically marginalized, agency is even more difficult because of long-standing experiences of one’s actions not leading to desirable impacts due to ongoing structural and institutional barriers, leading to lack of self-efficacy.”

The staff specifically brought up the concept of pulling oneself up by the bootstraps, and how that is a common narrative that needs to be disrupted not just to advance racial equity, but in working for social justice more broadly. The group also discussed notions of “power and self-worth” and how these play into the ability to be responsible for one’s own actions and their impacts.

Staff engaged with the application of the three levels of racism (individual, interpersonal, and structural) in a more concrete way than the board. The main driver of this is likely because the staff is more engaged with the day-to-day work of the Foundation than the board of directors. For example, staff named the following activities as areas that need to be examined for unconscious and institutional bias:

- Screening grantees
- The meaning of “capacity” in terms of evaluating organizational effectiveness

- How the Foundation ‘partners’ and with whom it partners
- Who is a leader, and how is this defined?

Staff also discussed other examples of how institutional and systemic racism impact everyday aspects of our lives and the lives of the people we serve. That list included: where grocery stores are placed, where housing is located and its quality, K-12 schooling curriculum content and who develops it, public transportation, voting rights, and public safety accountability.

As the staff got deeper into the content of the training, three notable themes and dynamics surfaced that were not present during the board training: 1) a sense of insecurity and desire to not share personal stories, 2) tension in the power dynamic between senior leadership and line staff, and 3) tension between the operations staff and the program staff. Thanks to the organizational assessment, we knew going in to the training that there was some uncertainty and fear about disclosure around experiences of race. Whereas the board found balance in how much of their own stories they would share, there were many long periods of silence during group share-outs in the staff training. We had anticipated power dynamics between supervisors and line staff, and corrected for them in the small group conversations. However, this only slightly changed the dynamic in the full group conversations. During the discussion about power, agency, and choice in the context of systemic racism, a few staff members provided examples of how power, agency, and access don’t only apply to race, using personal experiences at the Foundation. A response from a senior staff person illustrates the conversation about power dynamics between staff members: “It is challenging [for me] to hear that some

people in the organization have felt ‘othered,’ either by position or role, not necessarily by race or ethnicity. Our goal is for no one to feel ‘othered.’”

The most palpable dynamic was one that caught a few of us by surprise (in retrospect, I quickly realized that it was a blind spot on my part). Throughout the session members of the operations team remarked a few times that they did not fully understand how the racial equity lens would apply to their work on the finance and operations teams, and some felt that this was work that was more geared for the program and grantmaking teams. We put some of these questions and comments on a ‘parking lot’ flip chart to address in the coming weeks. However, during the training, our CEO did address the tension with a question and a comment, saying: “I think I might have done a disservice in leading with grantmaking [instead of operations] when I talk about embedding a racial equity lens in our work. It is all important. In fact, it’s most important right now that we look at our operations and how we work internally.”

Reactions to the Training

By many measures, the training went well. At the end of the training, each staff member completed an evaluation form in the training room. Because of this we had a 100% survey response rate. Based on survey responses, everyone on staff expressed receiving or experiencing something positive out of the training - from gratitude for being with and learning from colleagues to having an increased awareness of issues of racism and equity. Staff also highlighted some areas of improvement or concern, focused mostly on content and timing of the day.

Multi-layered Debrief Meetings

“I think we should meet before our debrief meeting with MAG,” one of the REPT members swung by my office, with quiet urgency in her eyes, clearly needing to discuss something important. “Sure,” I said. “Let’s go grab the rest of the team.” Sitting in our CEO’s meeting room, we listened to our team member tear up while filling us in on how she had been holding space for other staff members’ feedback and emotional responses to the staff training the previous week. It was a lot for one person to hold. And it was a lot to digest. I took notes about the feedback she had been receiving; chiefly that people felt overwhelmed and disoriented by the content and that some felt pressure to speak and felt judged if they remained silent. Perhaps more concerning was that a few people felt triggered by the training, either through reliving painful memories related to race or by the fact that they were awakening to the concept of white privilege and what it meant to be ‘white.’

While the CEO and I had noticed some awkwardness in the office following the training, we were largely unaware of the intensity of emotional responses our team member was recounting. After talking through the rest of her notes and our reactions, we decided to schedule another REPT meeting to discuss next steps before the full debrief meeting with MAG. We would take the intermediary time to reflect and process the information; the CEO and I also committed to checking in with a few of the folks who seemed to be struggling the most in one-on-one conversations.

REPT reconvened on May 5th, 2016 to close the loop on all the one-on-one conversations we had with other fellow staff members. We generated a list of possible activities and opportunities we could make available for staff, including offering 30-

minutes of coaching support to staff who needed further support after the training, a mechanism for providing feedback anonymously, and an all-staff activity to lessen the tension some folks were feeling. We vetted this list with our MAG consultant during our full team debrief meeting. She concurred that we try to make as many safe spaces for staff to learn and process new understanding about race and systemic racism.

Researcher Participant, Staff Lead Conundrum

It is surprising to me how difficult this section was to write, which, I think, speaks to the potency of the many emotions that came up for me during the training, the resistance of not wanting to relive all the tensions and staff dynamics of that day, but mostly the near impossibility of separating the training day itself from the subsequent ‘fallout’ that lingered for days afterwards. The office air was like a restless fog weighing each of us down in some way. It was during those days that I doubted my ability to both hold space for the change process and bear witness to my colleagues’ journeys and hold space for my own processing and self-discovery. In my journal, I wrote: “Luckily, common wisdom holds that, in time, fog eventually clears.” I utilized a couple coaching hours with the MAG consultant I most trusted, regrouped, pressed forward.

Section Two: May – July 2016

“Did we torpedo the whole thing?” It was May 16th, 2016. My CEO and I were sitting on a bench outside, debriefing the events of the past few weeks. It was hard to keep the many emergent dynamics, tensions, and polarities in our heads all at once, but we were both committed to the work we were undertaking and deep down believed we could keep muddling our way through. The two of us had many post-training conversations, and I’m grateful we had each other to lean on and that we were good

thought partners. The conversation on May 16th, however, was our last before I was to be out of the office for two weeks. We needed to pin down a plan for how the work would continue while I was away. I sighed, finally responding to her question, “No. I don’t think so.”

Reflection and Course-Correction: Slowing Down

With input from Meyer’s vice president for programs and the rest of the REPT, we decided to take a reprieve in our work to develop a racial equity stance. At a staff meeting during my absence, our CEO acknowledged and honored everyone’s participation in what was an intensive training. She also acknowledged that folks were tired and needed time to digest learnings and insights. Moreover, the program team was also wrapping up a grant round and preparing for the June board meeting, a time-consuming phase of our grant making process. Given all of that, our CEO announced that we were going to take a brief respite from our racial equity training while we prepared for the board meeting. She also told staff that, if they needed to, they could each access 30 minutes of coaching with either of our MAG consultants. Finally, she reiterated that her door was always open and encouraged everyone to reach out to her with questions or concerns.

Research, Rest and Reset

In the meantime, the REPT held a meeting to develop an approach (Table 9) for resuming the racial equity training and strategy development processes. We agreed that we needed to get more information about how each staff member was doing, so that we could both be responsive to people’s needs and continue making progress on building internal capacity for advancing racial equity. We assigned each of us three to four

colleagues with whom we would conduct informal check-in meetings. We decided that we would not schedule these check-in meetings, rather we would find time with everyone—leaning in their office doorway or sitting at the same lunch table—to promote a casual and low stress interaction. While these were unstructured meetings, we developed a list of questions we wanted to ask each person (directly or indirectly).

Questions included:

1. Tell me about your experience with Meyer's racial equity work so far. What has worked well? What are some highlights from the training and/or any informal conversations or reading, etc.?
2. What matters most to you about Meyer's racial equity work? What is it important to you?
3. What do you think is the core value of the Meyer Foundation? How do you think we can apply this aspect to our racial equity work?
4. What other activities or resources do you think you might to support your learning journey?
5. What else are you thinking about in terms of this work that we haven't talked about.
6. What else is in the mix that we should be working on or including?

Table 9.**Project Timeline: June – July 2016**

Event	Objectives	Timeframe	Participants
“Research, Rest and Reset”	<ul style="list-style-type: none"> – Check with staff about how they’re doing – Gather information on what is needed – Obtain feedback on the course-correction plan – Begin conversation about guiding principles for racial equity 	Jun 8-30 2016	<ul style="list-style-type: none"> – Racial Equity Planning Team members conducted one-on-one meetings with all staff
Kickoff Task Forces	<ul style="list-style-type: none"> – Launch the program and operations task forces – Discuss broad objectives for each task force 	Jun 20 2016	<ul style="list-style-type: none"> – President and CEO – Task force chairs (finance and operation, program) – Task force members (finance and operations, program)
New Project Timeline Presented	<ul style="list-style-type: none"> – Present the revised plan and timeline to the full staff team – Seek additional feedback, responses, and reactions 	Jun 30 2016	<ul style="list-style-type: none"> – Full staff (17 staff members)

We also wanted to test a few ideas about next steps we had generated during our check-in meetings. Chief among those ideas were slowing down the learning and growth activities, holding optional breakfast meetings (which we called “Continuing the Conversation” breakfasts) where people could show up and talk about whatever was on their mind, presenting the “Putting Racism on the Table” video series developed by the Washington Regional Association of Grantmakers (which covered topics such as white

privilege, implicit bias, structural racism—at all-staff meetings; not optional), and providing resources for self-directed learning.

Findings

Our check-in meetings were well-received and all staff members appreciated being consulted on the next stages of our racial equity work. There was unanimous agreement that the racial equity work was important, and that the Foundation should continue exploring how it could adopt a racial equity stance. People cited a variety of reasons for why working towards racial equity was important. For example, some people noted the uptick in the visibility of police shootings of unarmed Blacks and Latinos, the Flint, Michigan water crisis, and many other forms of discrimination. We also gained deeper understanding about some areas of the reactions and behaviors we observed at the staff training and in the days that followed; these areas of resistance are presented in Table 10.

Table 10.**Examples of Resistance**

Type	Illustration
Silence and Avoidance	<p>“I’m not sure what to say.”</p> <p>“I don’t want to say the wrong thing.”</p> <p>“I don’t want to accidentally offend someone.”</p>
Reinforcing Boundaries (resisting personal disclosure)	<p>“I have my work life and my personal life. I want to keep them separate.”</p> <p>“There is a reason I don’t want to bring my ‘whole self’ to this work . . . it is too painful.”</p>
Pacing	<p>“I can’t show certain emotions at work. I don’t want to.”</p> <p>“I need time to digest the information. It’s overwhelming.”</p>
Fear	<p>“I feel like we’re moving at a rapid clip.”</p> <p>“If I say the wrong thing, will that impact my job?”</p> <p>“I don’t want to lose my job, so I feel like I have to participate.”</p>

Section 3: June – August 2016

“We are committed to dismantling the belief in the hierarchy of human value.”

–Dr. Gail Christopher, June 2, 2016

As we know, in change processes, nothing is ever linear. Simultaneously, as the above work in Section 2 was taking place, the Foundation was also beginning a more philosophical and fundamental conversation about racial equity. (Table 11 outlines the events between June and August, and includes an event from Table 9 to illustrate the overlapping activities). At the June board meeting, we invited Dr. Gail Christopher of the W.K. Kellogg Foundation to speak with our board and staff about the racial healing work her foundation has been leading over the past several years. During her presentation, she told us that what grounds the Kellogg Foundation’s work is the entire board and staff’s

commitment to “dismantling the belief in the hierarchy of human value.” I can still feel the butterflies I felt in a moment of realization as I was listening to Dr. Christopher. I later wrote in my journal, “Dr. Christopher’s presentation crystalized a nagging feeling I’ve been trying to pin down. We really need to understand and agree on why we’re doing this [racial equity] work. What are our values? Why do we care? It has to be more than just wanting to do the right thing.” Without doing so, it was likely to remain a challenge getting and keeping board and staff members engaged in the process.

Table 11.**Project Timeline: June – August 2016**

Event	Objectives	Timeframe	Participants
Discussion of Racial Equity Goals	<ul style="list-style-type: none"> – Hold unstructured meeting to begin conversation about Meyer’s guiding principle(s) around racial equity 	June 7 2016	<ul style="list-style-type: none"> – President and CEO – Vice president for programs – Vice president for finance – Senior program team (including Maegan)
Kickoff Meeting: Task Forces	<ul style="list-style-type: none"> – Launch the program and operations task forces – Discuss broad objectives for each task force 	Jun 20 2016	<ul style="list-style-type: none"> – President and CEO – Task force chairs (finance and operation, program) – Task force members (finance and operations, program) <p>*Maegan was out of town for this meeting.</p>
Values Workshop	<ul style="list-style-type: none"> – Present findings from the REPT research – Review and explore the various iterations of corporate values statements and values around racial equity – Discuss the values we hold as individuals 	Jul 6 2016	<ul style="list-style-type: none"> – All staff (17 members)
Consultant Check-in Meeting & Course-Correction	<ul style="list-style-type: none"> – Update MAG on work and activities since the April training 	Jul 11 2016	<ul style="list-style-type: none"> – MAG consultant – Racial Equity Planning Team

	<ul style="list-style-type: none"> – Begin planning for September’s alignment session – Discuss strategy blueprint MAG is developing 		
Racial Equity Stance Conversation Series	<ul style="list-style-type: none"> – Discuss and articulate values, beliefs, and assumptions about race and racial equity – Use these conversations to begin developing the racial equity stance 	Jul 11 – Aug 12 2016	<ul style="list-style-type: none"> – Program task force / finance and operations task force hold separate working meetings
Articulating the Stance: Joint Task Force Meeting	<ul style="list-style-type: none"> – “Braid” our task forces’ parallel conversations – Reach agreement on our vision, assumptions, and core values for Meyer’s racial equity work (both internal and external) – Discuss September 9 workshop 	Aug 18 2016	<ul style="list-style-type: none"> – Program task force – Finance and operations task force – Maegan as facilitator
Articulating the Stance: Senior Leadership Team Meeting	<ul style="list-style-type: none"> – Present the draft racial equity stance for input and approval – Discuss September 9 workshop 	Aug 29 2016	<ul style="list-style-type: none"> – President & CEO – VP Finance and Operations – VP Programs and Communications – Program Director – Maegan as facilitator

Reflection: What is our guiding principle?

The insight that as a staff we needed to spend time unearthing and discussing values (which was later crystalized by Dr. Gail Christopher) stuck with me, and I went on

a kind of stealthy values crusade during the month of June. As indicated above, I introduced a question about values in the protocol for REPT's one-on-one check in meetings with staff to begin inoculating my colleagues to the idea of linking a values discussion to racial equity strategy development. A few days after the board meeting with Dr. Gail Christopher, I held an agenda-less meeting on June 7, 2016 and wrote about it in a paper discussing complexity theory:

"...motivated by [Patricia] Shaw, I experimented with organizing a new type of conversation at the Foundation, one with a minimal, unstructured agenda (very much out of the norm for this 70-year-old institution). The invitation: let's make sense of what it is we're trying to accomplish with our strategic plan and pursuit of racial equity." (Scott, 2016, p.3)

It was a tense, stressful, and, in some ways, disappointing meeting, complete with silence and communicating in circles. I later tested these observations with others who were in the meeting, and while most people noticed the same dynamics, instead of being disappointed they were encouraged by the fact that we were now in dialogue about things that have been subsurface.

The meeting ended with our CEO saying that we would find time to continue the conversation we started; she also stressed that we needed to keep the strategy development work moving forward, referencing the upcoming work of the strategy development task forces. With an air of minor defeat, feeling that the values conversation would be put on the back-burner, I wrote in my journal, "Well, tomorrow is another day."

Strategy Development Task Forces

Due to unfortunate timing, I was not able to join the launch meeting for the task forces. The task forces were created to focus on specific aspects of developing a racial equity lens. The program task force, which was composed of six staff members, was

charged with exploring how to infuse a racial equity lens into Meyer's grant making and the finance and operations task force, which was composed of five staff members, was charged with exploring what significance a racial equity lens might have on our HR practices. The task forces were intentionally designed to be cross-departmental. One program team member served on the finance and operations task force and vice versa. The task force chairs each had senior-level decision-making authority, which was also an intentional part of the design.

The Values Conversation Makes a Small Comeback

The Research, Rest, and Reset phase came to a close at the end of June 2016. On July 6th, 2016, at an all-staff meeting, the President and CEO presented a summary of the findings from REPT's research and one-on-one meetings. She focused primarily on the new timeline and activities, noting that some would be optional:

“What became clear both through our first training together and subsequent conversations is that a one-size-fits-all approach is not the way to go. So, with your input and suggestions, our plan moving forward is for a more flexible and dynamic set of offerings that will still enable us to create a baseline of common knowledge and understanding.”

She also teed up a conversation and workshop about Meyer values. As REPT worked to synthesize the notes from our conversations, we generated a list of all the values our colleagues listed in response to the question: What do you think is the core value of the Meyer Foundation? Table 12 captures the values that were mentioned.

Table 12.**Core Meyer values from the REPT one-on-one meetings with staff**

Commitment to Excellence	Transparency	Authenticity	Non-judgmental
Service	Integrity	Humility	Willingness to be Adaptable
Openness	Understanding	Compassion	Putting the Community First
Introspective	Careful and Considerate	Walk the Talk	Thoughtfulness

For the remainder of the meeting on July 6th, I facilitated a workshop with the staff designed to surface and bridge personally held and organizationally espoused values. During the workshop, we also discussed which of the identified values we could lean on as we continued with our racial equity work. Our conversations were mainly conducted using a 1-2-4-All liberating structure (Lipmanowicz & McCandless, 2014). We used dot-voting to prioritize the Meyer values that resonated most for our moving forward. While we were not able to resume the conversation about values as they relate to racial equity, the mini workshop on values was well received and gave staff an opportunity to learn more about each other in a less emotionally charged setting.

Course-Correction: Unearthing Values, Beliefs and Assumptions

July 11th, 2016—a date that marks one of the most significant pivot points in the first 11 months of this initiative. The full REPT (board and staff) and MAG consultant had a virtual mid-year check-in meeting to discuss staff's progress on developing the racial equity stance and to begin planning for the third and final training/alignment session in our contract with MAG that would be held in the Fall. We scheduled the

meeting so far in advance of the September 9 training because Washington, DC empties during the month of August, and we wanted to be sure we were prepared. Our MAG consultant asked us for a summary of the work the two task forces were able to accomplish since they were launched, and we reported ‘not very much.’

I explained in that my observation and participation in the program task force meetings there was a sense that we were circling without having an anchor to fall back on. Almost like a plane in search of a landing strip, finding none, it continues to circle. We were having difficulty grounding our conversation about what a racial equity lens might look like in our grantmaking activities. I also reported that both task forces were feeling pressure to have a strategy ready for board review in October (a deadline we had set at the outset of the initiative). The pressure combined with a lack of direction was resulting in some stress and fatigue on the two task forces. The board members on the call chimed in as well, noting that on the board side there were still question marks about how we would measure success.

Over the course of the call, the juxtaposition of these observations and questions (lack of direction, measuring success, feeling pressure without clarity on how to perform) made it clear that we had yet to answer a fundamental question: Why? Why is the Meyer Foundation called to this work in this moment in time? What core beliefs do we hold about racial equity and racial justice that will guide our decision-making? How are we building an internal community and culture that is equity- and justice-oriented? It was a dawning moment where we faced the fact that we had collectively been operating on a set of tacit assumptions: we wanted to advance racial equity because it’s the right thing to do. But as to what meaning were we making around racial equity and systemic racism—that

was happening subsurface. Towards the end of the call our CEO remarked: “We absolutely have to get clear on what position we’re taking.” In other words, we needed to expressly and explicitly articulate a stance—complete with our values, beliefs, vision, and assumptions—on racial equity before we could develop a strategy for embedding a racial equity lens in our grantmaking and operations.

In my field journal the day after that meeting, I gave myself a slight nod on a sticky note: “axioma et fides illuminatus,” which is scratch Latin for principles (values) and beliefs, illuminated. I was ecstatic that we were redirecting to a conversation I was bursting to have since hearing Dr. Gail Christopher’s presentation. At the end of the team call with our MAG consultant, we agreed to slow down the timeline for the initiative. Where we had hoped to have a developed racial equity strategy for the board to review at its October meeting, we changed course to focus solely on articulating a racial equity stance, which we would vet at the board-staff alignment session in September.

Values Conversation Series

At the beginning of July (continuing through August), the Foundation staff was in a place of readiness to change the way we talked with each other about racial equity and systemic racism. However, there was still some dis-ease in the organization for full group conversations. I created a work plan that would enable us to have various and concurrent small group conversations about values. The two task forces would use their standing meetings to hold their values conversations. We would then have a joint meeting, a moment where these disparate conversations would come together; a process I described as “braiding,” to synthesize our current thinking about what is core to Meyer’s racial equity work.

The program task force held a 3.5-hour meeting on August 8th to discuss our individual values in general as well as the beliefs and assumptions we hold when it comes to racism. The meeting did not have a dedicated facilitator; however, we asked each other curious questions to further clarify our thinking. Each member took a turn taking notes on flipchart paper. In large part due to the expertise on the program task force around issues of equity, we were quickly able to generate a set of values and commitments, vision and goals, and assumptions and beliefs.

The finance and operations task force held three 60- to 90-minute meetings, on August 10th, August 14th, and August 17th. Because this team had comparatively less experience around issues of race and equity than the program task force, I facilitated two of the meetings. The finance and operations task force needed some support in expanding the members' understanding of the dimension of racial equity (for example, privilege and implicit bias) and vocabulary for talking about race and racism. To start each meeting, I introduced activities designed to develop shared vocabulary and in one meeting I delivered a lesson on the ladder of inference to prompt a discussion about bias. After the activities, we would move into a discussion about racial beliefs and assumptions. To close the meetings, we examined racial equity values that could inform Meyer's internal operations, focusing on HR practices. By the end of the third meeting, we generated a document that summarized these conversations.

Articulating the Racial Equity Stance

On August 18th, I facilitated a two-hour working session of the two task forces to synthesize our parallel conversations and begin distilling an articulation of the Meyer

Foundation's racial equity stance. Through a mixture of interactive discussions, personal reflection, and small group work, participants worked to answer the following questions:

- What is emergent in our vision and values for Meyer's racial equity work?
And what is your personal reaction to it?
- What are incremental and long-term goals and successes for Meyer's racial equity work?
- What is emerging as a core value?
- What has come up for you in these conversations?
- Which racial equity statements most resonate with you?

By the end of the meeting, we were able to utilize dot-voting to indicate the elements of a racial equity stance (values, vision, goals, and assumption) that resonated the most. We closed the meeting with a full group discussion about concerns, ideas, and insights moving forward. We also discussed the goals and objectives of the upcoming board/staff alignment session.

The joint task force meeting was successful on several levels, most importantly that we reached a loose consensus of what a Meyer racial equity stance might be. We also gained a better sense of the conversation we hoped to have at the board/staff alignment session. In the full-group discussion several participants raised questions about the board's current thinking around Meyer's racial equity work, and whether our CEO and vice president for programs, who were not a part of the conversation series, would resonate with the stance we were articulating. Some tension aroused between operations team members and program teams but not to the degree we experienced in the first all-staff training in April. This tension surfaced during discussion about Meyer's role in the

external community around advancing racial equity and was primarily driven by difference of opinion and understanding about the impact of Meyer's grantmaking.

After the meeting, I continued consolidating and synthesizing the work of the two task forces and the conversation in the joint task force meeting, producing the first draft of the written racial equity stance. (The draft that we presented at the board/staff alignment session can be found in Appendix C.) The draft also included a very brief overview of the state of racial inequity in the Washington, DC region and some information of historical policies and practices that led to or perpetuated those inequities. Once completed, I held a meeting with the senior leadership team (the president and CEO, vice president for programs and communications, and the vice president for finance and operations) to present and review the draft, and debrief the team on the values conversation process and outcomes. The senior leadership team strongly agreed with the content of the stance and were pleased with the inclusive process that produced it. They made meaningful edits and approved the document, thus giving the greenlight to push the stance forward for further vetting at the board/staff alignment session.

Researcher Participant, Staff Lead Conundrum – Take Two

Like the all-staff training in April, the values conversation series (in particular, the joint task force meeting) challenged my fortitude for and sometime confidence in being a trainer, facilitator, project manager, and staff participant all at once. While I was immensely proud of the work I was able to lead over the previous several months and the role I played in shepherding the process leading up to the board/staff alignment session, I was experiencing the emotionally taxing and lonely work of being an internal practitioner. Managing a process that was mired in interpersonal landmines—the

unexamined self and unexamined relationship can be harrowing to unearth—added another layer of complexity and psychological drain. In a journal entry on August 10th, 2016, I wrote:

“I feel this odd mixture of power and exposure. Power because who knew I could lead an organization-wide initiative so successfully? Exposure because I’m sure at some point, they’ll all figure out I’m an imposter. The odd thing about being an internal is that I am to be both invisible but also present. What’s definitely apparent is that with all that going on, I’m so exhausted. Absorbing all of the dynamics between and around folks, intuiting where to go next. Fostering trust in my individual relationships with each person on staff. Mentally designing a container for us all to build trust with each other. Wondering whether I’m inserting too much or not enough of my own deeply held beliefs about systemic racism, and what role I think Meyer should play in all this.”

Section Four: September – October 2016

Integration and Vetting the Stance. Going into September and October, we were nearing the moment to integrate the work of the first phase of our racial equity initiative and bring it to a close. With a racial equity stance drafted, we could vet it with the full organization, both board and staff. We would then use the vetted stance to resume developing our grantmaking strategy and internal operations practices with a racial equity lens in 2017. It was also important to us to have moments for building rapport between the board and staff, and moments of collective learning and reflection on our region and country’s racial history. Table 13 shows the timeline of the final two events of the 11-month initiative.

Table 13.**Project Timeline: September – October 2016**

Event	Objectives	Timeframe	Participants
Board/Staff Alignment Session	<ul style="list-style-type: none"> – Vet and ratify the racial equity stance – Develop shared understanding of key questions in the racial equity stance – Build rapport and develop relationships among board and staff – Strengthen capacity and confidence to engage in racial and ethnic equity with courage, trust, and skill 	Sept 9 2016	<ul style="list-style-type: none"> – 8 board members – 16 staff members
October Board Meeting: Gallery Walk	<ul style="list-style-type: none"> – Contextualize Meyer’s racial equity work in the local and national history of policies and practices around race, and structural racism 	Oct 18 2016	<ul style="list-style-type: none"> – 8 board members – 17 staff members

Board/Staff Alignment Session

The board/staff alignment session was held at the Meyer Foundation’s offices on September 9th, 2016. Eight of nine board members were present and 16 of 17 staff members participated in the session. One staff member was excused due to a commitment that could not be rescheduled. Objectives of the alignment session included: vet and ratify the strategy blueprint and racial equity stance, develop shared understanding of key questions in the racial equity stance, and build rapport between the board and staff members. The full agenda for the alignment session can be found in Table 14.

Table 14.**Facilitator Agenda for Board/Staff Alignment Session on September 9, 2016**

Activity	Key Points/Objectives	Timing
Welcome, Ice Breaker, Goals, and Agenda Review	<ul style="list-style-type: none"> – Ice breaker – Agenda review – Participation norms and agreements 	9:00 – 9:15am (15 minutes)
Introductions and Rapport/Relationship Building	<ul style="list-style-type: none"> – Trio dialogues about hopes and motivations, current event reflection – Voluntary popcorn highlights 	9:15 – 9:45am (30 minutes)
Strategy Blueprint Executive Summary Document Review	<ul style="list-style-type: none"> – Overview – Q&A 	9:45 – 10:15am (30 minutes)
Vetting “Vision, Stance and Success” Draft	<ul style="list-style-type: none"> – Framing the meaning of success – Overview of how it was designed/developed – Small group discussion – Report out / whole group discussion 	10:30am – 12:30pm (90 minutes)
Lunch 12:00 – 12:30pm		
Deeper Reflection on Key Questions in the Vision / Stance	<ul style="list-style-type: none"> – World Café 	12:30 – 2:15pm (105 minutes)
Closing Reflections, Evaluation & Adjourn	<ul style="list-style-type: none"> – MAG summarizes next steps and gives advice – Nicky, Maegan, and Debby share next steps – One word phrase reflection on the day (round robin) 	2:30 – 3:00pm (30 minutes)

The most substantial discussion during the session centered around reviewing, discussing, and vetting the racial equity stance. The stance document also included key questions that were generated over the course of the values conversation series. In addition to reviewing the stance document, the board and staff reflected on the questions presented in the document. To view and vet the stance, we broke into four small groups (approximately six to seven people per group) and discussed the following questions:

- What about this Vision and Stance resonates with you? What is the most important for the Foundation right now? Why?
- Anything that doesn't make sense? Anything you don't agree with?
- How would it really look for the values to be in place and real?
- What do we really mean by the list of assumptions? Which need further discussion?

We used a World Café format to reflect on key questions posed in the stance document.

We had three café tables, focused on the following areas:

1. What are the political constraints, history and current contexts that we need to more deeply understand to grasp the lives that people and communities are living?
2. How do we envision and understand “connectedness?” How do we ensure that we aren't prescriptive in how we define “thriving?”
3. “Race” & “Ethnicity:” When we use the term “racial equity,” are we using it to the exclusion of ethnicity?
 - a. How do these terms relate to intersectionality and the parallel experiences of groups under the umbrella “people of color”?
 - b. How do these terms relate to racialization and our country's history of oppression, anti-blackness and colorism, which target, view and place marginalized groups into racial groups?
4. How do we acknowledge the power and privilege inherent in philanthropy and our institution? How do we leverage this position and influence our “elite” networks in pursuit of equity in our region?

- a. How do we acknowledge Meyer's specific history as a grantmaker and influential institution in the community (with an eye to how the Foundation's work may have exacerbated inequity and systemic racism)?
- b. How do we own this history so we can be full, authentic partners with those who've been working on equity for decades?

World Café Reactions

At the end of the World Café rounds, the table hosts reported on two to three highlights from their respective conversations. The political constraints, history, and context table host reported that they reached “consensus about the need to focus on key areas, and not try to ‘boil the ocean’ to learn about everything.” The connectedness table host also reported consensus at the core of what is meant by connectedness, but acknowledged that it could be beneficial to find a different term. According to the table host, the conversation illuminated that connectedness is the “opposite of othering.” The table host also reported that three focus areas on connectedness surfaced: regional connectedness, individual connectedness, and Meyer's connectedness to the community.

The power and privilege in philanthropy table host also reported that there was consensus about key areas to focus on; however, several questions were raised for further conversation, including “what is the role of acknowledgment” in looking at Meyer's power and privilege, especially in terms of looking at the Foundation's past practices. Follow-up questions wondered about whether the purpose was to exorcise (white) guilt, and whether that would be fruitful or distract from future transformation.

I was the host for the race and ethnicity table and it was collectively acknowledged that it was the most difficult of the four tables. Admittedly, I volunteered

to host this table for that very reason. When our MAG consultant asked if we felt strong alignment on the stance, there were a lot of heads beginning to nod. I had to summon the courage to raise my hand and say, “Not really, no. More work needs to be done on this topic.” As the table host, I was hearing two unreconciled opinions about our racial equity stance: one that understands racial equity to include the racialization of other groups (for example, different ethnic groups, immigrants, refugees, and Muslims), and the other that views racial equity as something that targets race exclusively. The conversation can be summarized in the following three questions I captured:

- What is gained with the use of the term ‘ethnic’ (e.g., inclusion)
- What is lost with the use of the term ‘ethnic’ (e.g., diluting)
- How not to exclude but also be authentic about both the historical and current reality of race in the U.S.?

In synthesizing the conversations, I noted that everyone agrees that “the Foundation’s stance matters on this issue [of racial and ethnic equity], and framing will signal different things to different communities.” The next step in the process will be to create a statement on race and ethnicity that validates both perspectives. There was some agreement that this statement should emphasize both the “non-erasure of race and the experiences of new immigrants.”

In reflection, I no longer see these opinions as irreconcilable, but polarities that need to be managed. Both statements are true, especially considering the diversity of the community the Meyer Foundation serves.

The alignment session concluded with approval from the board to continue using the stance as written to inform the next steps of our racial equity strategy development.

We all agreed that we wanted to vet the stance with external partners and colleagues. In this sense, the alignment session successfully accomplished a primary objective. As the staff lead for the project, I was ecstatic and lived on an adrenaline high for about 48 hours afterwards. As a participant observer, I had one overarching observation: while there was general agreement on the way forward, there was still a gulf beneath the surface when it came to understanding the nuances of systemic racism, power and privilege, and what it would mean to embody racial equity values. The World Café tables on race and ethnicity as well as power and privilege in philanthropy illuminated this. I left with one question and one answer. The question: do we need to close the gulf between us? The answer: yes and no.

Meyer Foundation Racial Equity Stance

At the end of the 11-month process, the Meyer Foundation board and staff approved a racial equity stance it would use to inform future strategy development: “We envision a just, connected, and inclusive Greater Washington community, in which systemic racism and its consequences no longer exist.” Undergirding the stance are a set of values, beliefs, and commitments that were vetted at the board/staff alignment session on September 9, 2016. The full racial equity stance can be found in Appendix C.

Beliefs and Assumptions.

1. We believe the connection between poverty and racial equity is not incidental but structural and causal.
2. We understand equity to mean just and fair inclusion into a society in which all can participate, prosper, and reach their full potential.

3. We believe that the challenges our region faces are interconnected and the result of systemic and structural racism.
4. We believe that all communities have assets on which they can draw as they face challenges and opportunities.
5. Communities themselves have the knowledge, wisdom, and ideas to shape their futures.
6. We believe that diverse experiences and perspectives are essential to our work.
7. We believe that unchecked biases and assumptions combine to create inequitable policies and practices.

Values and Commitments.

1. We honor and are inspired by the human dignity of all people.
2. We are committed to ensuring that individuals and families are connected to community, and to building bridges that nurture those connections within communities.
3. We are committed to listening to communities, to engaging in authentic dialogue, to following their lead, and to applying what we learn to all facets of our work.
4. We commit to bring to our work compassion, respect, integrity, humility, accountability, and responsiveness.

Racial History Gallery Walk

To close the knowledge gap of our country's racial history, our CEO and board chair committed to incorporating a racial equity learning moment in every meeting of the board of directors. For the October board meeting, I suggested we do a gallery walk of historical events, policies, and practices that led to and exacerbate the racialized

outcomes in the Washington, DC community and across the country. Building on top of materials created by the Western States Center, a consultancy focused on social justice, I put together a set of 87 slides of events dating back to 1619, when Virginia and Maryland were established as slave colonies, to the 2015 Flint, Michigan water crisis.

We did the gallery walk at the start of the October board meeting, so that all staff (including those who don't typically attend board meetings) could join the activity. I posted the slides throughout the Meyer conference room and into the lobby, mimicking an art gallery. Everyone was given two stacks of sticky notes, a pink stack for writing personal reflections and a yellow stack for writing professional reflections. I instructed everyone to capture what was resonating—personally and/or professionally—on sticky notes, and then place those notes on the slides that caught their attention. I gave everyone about twenty minutes to walk around the gallery, and then we returned to the conference room for a full group discussion. The full gallery walk can be seen in Appendix D.

The full group conversation centered around two themes: 1) the work of racial equity and our region's racial history are deeply personal and 2) validation (for some) and an awakening (for others). One of the benefits of giving participants different color sticky notes is that you can visually see what is resonant for people in the group. For example, there was a cluster of sticky notes during the slides covering the Civil Rights Movement and the social unrest in the 1970s and 1980s. These speak to participants' lived experiences. The distinction between personal and professional reactions is also powerful. We could see, without counting, that there were more pink (personal) sticky notes than yellow (professional) sticky notes. A final count revealed that there were 86 pink sticky notes compared to 60 yellow sticky notes. This observation drove home that

the racial equity work is deeply personal work. During the conversation, a few participants (mostly white) noted that by the time they reached the mid-1900s slides they were beginning to absorb the weight of our country's racial reality. A few people of color in the room shared that some of the slides highlighted just how much Black people and other minorities have had to go through just to get where they are now, which is still a position of marginalization.

Charting a Path Forward: Final Reflection

To close this piece of work, I interviewed each member of the Racial Equity Planning Team and the leads for the two task forces. The themes of these interviews, combined with my observations, are summarized in Tables 15. Unanimously, every person I interviewed was ready and eager to start the next phase of work—in other words, people are ready to begin implementing and embedding the racial equity stance in many aspects of the Foundation's work. Over the course of my interviews, four themes surfaced: creating and safeguarding boundaries, mindset shifts, pacing, and readiness and awareness. Table 15 includes illustrative quotes that highlight each theme.

Table 15.
Highlights from Post-Initiative Interviews

Theme	Illustration
Creating and Safeguarding Boundaries	<p>“You come to think of work as a safe space, and then we took that safe space away. Moving forward we should look at the expectations we have about personal and professional boundaries.”</p>
	<p>“At the beginning it felt a little traumatic...I’m always conscious of whether it’s exploitative to have oppressed people talk about their experience of oppression...This is why caucusing can be so important.”</p>
	<p>“We have to be aware of how people learn and process. Not everyone is comfortable with being uncomfortable. Without acknowledging this, it can—and in some ways did—backfire.”</p>
	<p>“We didn’t realize the splash we were going to create when we jumped into this work...because we couldn’t anticipate it, we didn’t set up enough supports for the emotional fallout. We were a little underprepared.”</p>
Mindset Shifts	<p>“I have noticed how this work has been showing up in my personal life, in both subtle and significant ways.”</p>
	<p>“I’ve committed to asking a question about race in whatever meeting I’m in.”</p>
	<p>“I believe we need to focus more on power . . . even though we have a black Mayor [in D.C.], the most marginalized people still don’t have a voice.”</p>
	<p>“Because of this process, I have a strong conviction to just never relent. It’s too easy to fall into complacency [about racism]. And if we do, then we’re just all screwed.”</p>
	<p>“This [presidential] election was a big eye-opener for me . . . it was just so shocking how his racism was not offensive to</p>

	<p>people. And I realized that it was only shocking to me because I'm a white person... This process did push me to think more deeply about these issues."</p> <p>"I've noticed how people are growing and changing... It's easier to have conversations about race."</p>
Pacing	<p>"We did the right thing hitting pause [in the summer] to slow down the pace."</p> <p>"Time has been the most challenging thing about this process. How fast should we be moving versus how slow? And there were times when we just weren't on the same page in terms of when to go fast and when to go slow."</p> <p>"It's so much that we want to change... we want to do it right. But there's also an argument for expediency."</p> <p>"The different levels of understanding [within the organization] made it difficult to pace appropriately."</p> <p>"The other thing with pace is that you can't include everyone in everything... meetings, decisions... it's just a tough thing about process."</p>
Readiness & Awareness	<p>"It's amazing and encouraging to me how on board everyone is with this work, even 12 months in."</p> <p>"I didn't really understand what 'dominant culture' meant before this process... and now I lead with it in most conversations."</p> <p>"I find myself noting things more . . . you can't put the toothpaste back in the tube. Once your lens has shifted, you can't go back."</p> <p>"I have gotten very comfortable using the term 'racism' . . . I wasn't at the beginning of this work. I find that saying racism carries more weight than saying 'racial equity.'"</p> <p>"I am much more aware of the way that dynamics of race play out in the national scene, in our work."</p>

“I’m paying more attention to how I’m perceived, especially when it comes to power and privilege.”

“We’ve come a long way as a group, and that’s a hopeful thing. It’s evident that there’s been shared learning, and shared understanding is beginning to emerge...Even hard conversations are becoming easier.”

Summary

This chapter described the key events and processes, and reviewed the outcomes of this study. Chapter 5 presents the discussion, including a further reflection on these findings, as well as study limitations and areas for future research.

Chapter 5: Discussion and Conclusion

The purpose of this study was to explore and understand how to develop a racial equity stance. I used the Eugene and Agnes E. Meyer Foundation as a case study to conduct action research to observe and describe this process. Building on the findings presented in Chapter 4, this chapter presents a working model I developed to describe the process for adopting a racial equity stance and extends the discussion regarding the ways in which cultural competence, diversity, and inclusion support organizations pursuing racial equity. This chapter also discusses polarity management, using the racial equity stance model to explore how the Meyer Foundation negotiated paradoxes that arose throughout the change process.

Redefining Cultural Competence

As noted in Chapter 2, one criterion of organizational cultural competence is having a “defined set of values and principles [as well as] behaviors, attitudes, policies, and structures that enable [the organization] to work effectively cross-culturally” (NCCC: Curricula Enhancement Module Series, n.d. (Cultural Competence: Definition and Conceptual Framework section, para. 1). When we launched the initiative, we acknowledged that to successfully adopt a racial equity lens, the board and staff would need to increase individual and organizational cultural competence. However, we targeted building this capacity through training and education about issues of race and racism. When we reached the mid-point of the initiative, the moment when we were having difficulty making progress on developing a racial equity strategy, we were confronted with the fact that we still needed to attend to a fundamental aspect of cultural

competence. This fundamental aspect was the surfacing and defining of our values around race and ending systemic racism. More than training and education about issues of race and racism, developing a strategy to address the complexity of structural racism required a deeper capacity for individual and organizational reflection. Throughout the values conversation series in July and August 2016, we discovered and drafted a vision and set of beliefs and values that could guide us in our work to pursue racial equity. This intervening process to align and create coherence within the organization's culture was crucial for the Foundation to progress in developing strategy.

This values conversation series pushed the Foundation beyond the traditional cultural competence model to identify and define a worldview. In the Cross (1989) model, to develop cultural competence the prime objective is to increase the capacity to develop adaptation to service delivery, reflecting an understanding of cultural diversity. The concept of 'service delivery' is difficult to translate to the field of strategic philanthropy where there is little to no element of direct service in foundation strategy. Rather than focusing on direct service, philanthropy is more concerned with its approach to and efficacy in grantmaking and partnership.

A key driver for foundations to address issues of diversity, equity, and inclusion is to increase philanthropy's effectiveness in responding to community needs and challenges. In the place of improving service delivery (Cross, 1989), philanthropy asks the questions: (1) What do our investments enable nonprofits and the community to do? (2) What is the impact we want to have on the community writ-large? In answering those questions within a values framework, we were ultimately engaging in two activities that rise above cultural competence: defining our worldview and grasping the concept of

systems change. That perspective would inform how we understood the broader environment in which we were operating and our role in influencing change.

Shifting Worldviews in Philanthropy

A trend to address the root causes of poverty, inequality, and systemic racism is growing in the philanthropic sector. The following are mission and vision statements from a select number of foundations that are taking a stand on inequality and racial equity.

Table 16.**Foundation Racial Equity Statements**

<i>W. K. Kellogg Foundation</i>	<p>While poverty and low family income are risk factors that inhibit success for many children, racial segregation and its attendant problems compound those risks. Far too many children of color live in racially isolated neighborhoods in metropolitan areas, and in segregated rural and tribal communities across the United States. Achieving our mission requires that we actively pursue racial equity for all children by addressing structural racism and its consequences, within communities and the institutions that serve them.</p> <p>(wkkf.org/what-we-do/racial-equity, n.d.)</p>
<i>Hyams Foundation</i>	<p>Over the past several years, the Foundation has undertaken a deliberate process to understand the underlying causes of the racial disparities it was trying to address using a ‘structural race analysis.’ As a part of this work, the Foundation adopted its own definition of racial justice, which has since become our ‘vision’ as a foundation. Applying a structural race analysis at Hyams has involved identifying the multiple institutions, policies and actions that have created racial disparities over time. (hyamsfoundation.org, n.d.)</p>
<i>The San Francisco Foundation</i>	<p>The Bay Area is at a crossroads. We live in one of the most industrious, exciting places anywhere. We know that our vitality, ingenuity, and broad array of cultural identities make the region special. Yet despite historic levels of prosperity, we are seeing widening inequality, increasing poverty, and declines in upward economic mobility. The rising tide is not lifting all boats. (sff.org/programs, n.d.)</p>
<i>Meyer Memorial Trust</i>	<p>We see our role as working to dismantle barriers to equity and improve community conditions so all Oregonians can experience safety, health and prosperity. We will do our best to share the power and resources that come with being part of Meyer. And we pledge to do our best to track outcomes experienced in communities hit hard by bias and oppression.</p> <p>(mmt.org/equity, n.d.)</p>

<i>The Ford Foundation</i>	The rationale underlying this focus on inequality is simple and powerful: Inequality, in all its forms, represents the greatest impediment to just, fair, and peaceful societies that offer opportunity for all. This is because inequality, in its broadest sense, can be found at the root of nearly every injustice. It stacks the rules of our systems to favor the privileged, and in that way, it compounds itself. Addressing inequality requires a more nuanced understanding of how it operates. We are continuously striving to see its workings as both global and local, immediate and long term, affecting people’s lives as well as distorting the systems it infects.”

Connecting Worldview to Systems Grantmaking

Each of the above foundations provides a clear point of view about the ways in which they believe structural inequality impacts the communities they serve. Their new ways of seeing community challenges inform how the respective foundations place their contributions within the system they are working, and consequently, how they approach their work. Chapter 2 introduced the concept of ‘targeted universalism,’ an approach that looks at desired universal states (for example, improving the high school dropout rate) and targets an aspect of the problem that predominantly impacts a group of marginalized people (in the same example, young people of color). This approach reminds us that we are all part of the same system, or social fabric, but names who is most adversely impacted by the societal challenge and then finds solutions that will address the root of the problem for the most adversely impacted. Table 16 illustrates foundations that are working within a targeted universal, or systems, frame. In the case of racial equity, solely valuing diversity and being competent in cross-cultural environments is insufficient. Pursuing racial equity necessitates foundations to move beyond a diversity framework

“toward a more explicit acknowledgment of the roots of structural racism, its implication for the foundation’s mission, and organizational strategies to advance racial justice” (PRE & ARC, p.11).

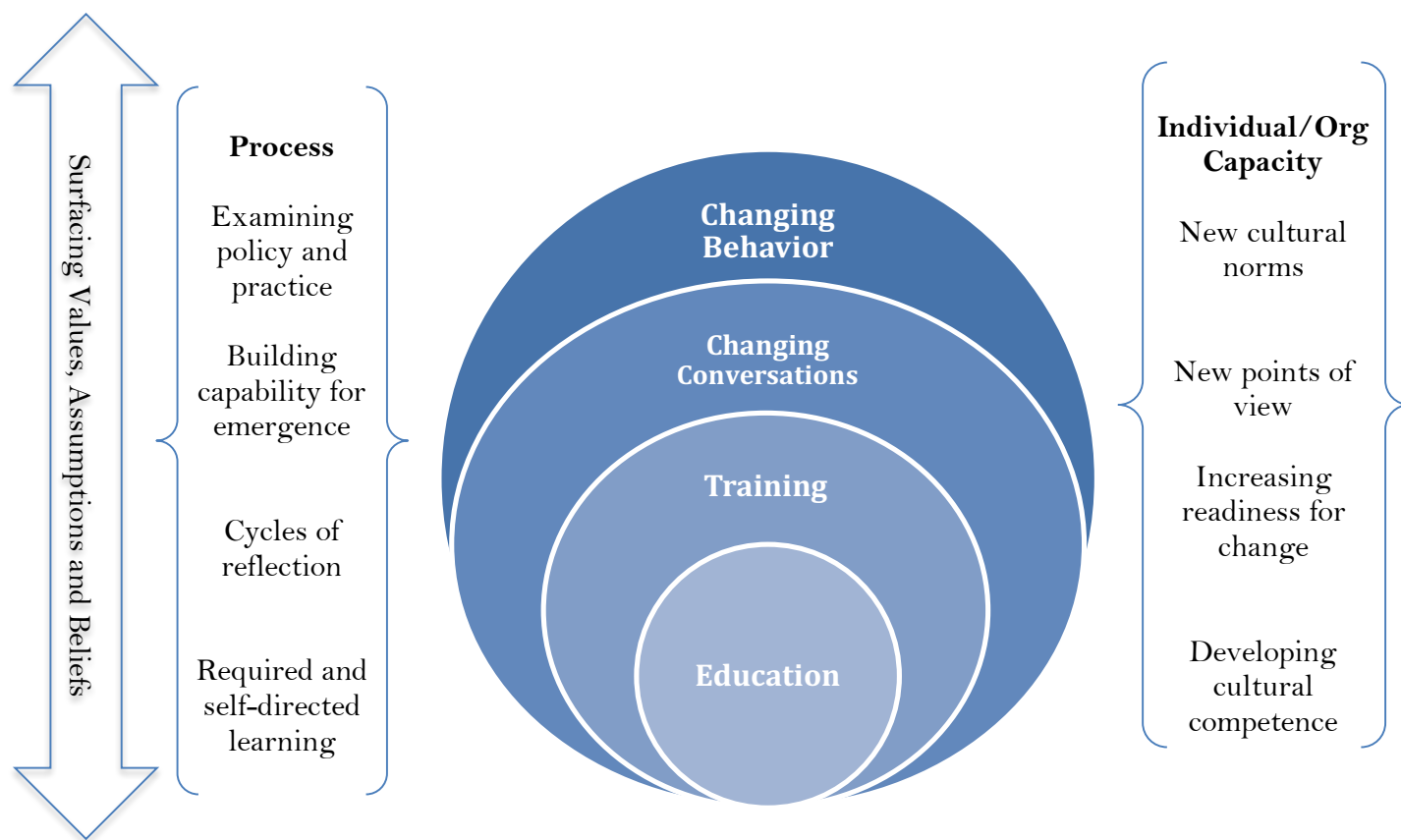
Model for Building Organizational Capacity for Racial Equity

While the Cross (1989) framework has been used successfully to increase cultural competence in several organizations across many fields, the framework falls short when it is applied to the complexity of systems change and the context of developing organizational and individual capacity for advancing racial equity. Based on the literature on the topic and my experience and observations during this action research study, I have developed a model to develop a racial equity stance, building on other models that focus more specifically on cultural competence.

The racial equity model (see Figure 1) mirrors the participant action research model in that it incorporates both action (process and interventions) and outcomes (participant learning and development). The model has four elements, or phases, for building organizational capacity for racial equity: 1) self-directed and required education, 2) training, 3) changing conversations, and 4) changing behavior. It is important to note that these phases are not linear and, in fact, are concurrent. They are also ongoing, becoming more nuanced and richer as the change process continues. Throughout the process, individuals in the organization are continuously engaging with and surfacing values, assumptions, and beliefs that they themselves hold and that are tacit aspects within the organization’s culture.

Figure 1.

Foundation Racial Equity Statements

**Education**

Rigorous education and learning activities form the foundation of the racial equity model. The goal of the education element is to increase understanding of the many forms of racism and corresponding phenomena, including white privilege, implicit bias, and strategies of oppression. At this stage, education goals also include an understanding of the historical and current dynamics of racism at a broad (national) and local level. Because this type of learning is often challenging (for both whites and people of color),

the *process* for implementing educational activities can range from required baseline understanding to self-directed learning and exploration.

Training

With a base understanding of racism in all its forms and manifestations, participants are better equipped to engage in a series of trainings which should, most often, include the entire organization. The goals of the trainings are to help participants engage more deeply with the concepts they are learning, exploring how they show up in their everyday lives. These trainings help to increase understanding of solutions to address different forms of racism and provide space for dialogue (building comfort and capacity to have difficult/transformational conversations with people who have different life experiences). As a result, participants gain real-time experience in inter-cultural sensitivity and fluency in core racial equity topics; organizations begin to develop a shared language.

These types of trainings are complex, profound, and at times difficult and painful. They need to occur in a ‘container’ and require expert facilitation to hold the container. However, the trainings can also lead to dual process and capacity-building outcomes. The content and flow of the training gives insight into how participants are processing information and what they need to further their learning, growth and development. Staying true to participatory action research, the end of each training offers an opportunity for reflection and course correction. Moreover, because of having engaged in such interactive and self-exploratory trainings, participants are further enhancing their cultural competence.

Changing Conversations and Changing Behavior

The next two phases, changing conversations and changing behavior, are connected and organic outgrowths of the education and training activities. However, they also require intentional direction from the organization leadership and change agents within the organization. Structured and unstructured conversations (agenda-less meetings, water cooler conversations) should be encouraged and planned as a means of processing and embodying new learning, new ways of being, and emergent thinking (Shaw, 2002). Because of education and training activities, people in the organization are developing new points of view. They are building capacity for emergent thinking and normalizing emergence in the organization's culture. Furthermore, the way we interact with people within an organization is a direct result of the norms within the organization's culture. Changing these interactions leads to new cultural norms. Finally, changing behavior is also the result of active and intentional inquiry into existing organizational policies and practices. The organization has built capability for leaning into and embracing discomfort. The organization has also developed increased capacity and readiness for change.

Revisiting Diversity and Inclusion – A Note on Culture

It is important to note that the model for adopting a racial equity stance does not stand on its own—there is an underlying pre-requisite that the organization has engaged in or is concurrently addressing critical dimensions of diversity and inclusion. In more than a few ways, cultural competence and the elements of the Cross (1989) model are at the foundation of the model to adopt a racial equity stance. Chapter 2 explored the work of Kasper, Ramos, and Walker (2004), Scott, Heathcote, and Gruman (2011), Roberson

(2004), and Tapia (2004), researchers who emphasized the importance of inclusion in fostering a culture that thrives on diversity. Extrapolating from their research, the model for adopting a racial equity stance posits that organizations that have embedded and explicit values and practices around inclusion are well situated to draw on the strength and safety within the organization's culture to navigate the crucial and courageous conversations that are inevitable in the pursuit to advance racial equity.

Managing Polarity and Working Through Paradox

Over the 11-month initiative, I observed two layers of polarity management, process and content. I addressed the content polarity briefly in the above section on targeted universalism. In developing a grantmaking and programmatic strategy to advance racial equity, there is an either/or tension between identifying solutions that will improve the life of individuals and solutions that will yield community-level systems change. The scope of this study, however, centers on the process of developing a racial equity stance. In researching elements of organizational change, Morgan (2006) discussed the dialectics of management, examining how “new initiatives or new directions get mired in paradoxical tensions that undermine the desired change” (p. 282). This view of change is a cornerstone of complexity and chaos theory and demonstrates how the struggle of opposites plays out in organizations. Morgan also writes: “This is the key problem that blocks so many organizations that are trying to transform themselves. Because of the power of the established context, they end up trying to do the new in old ways” (p. 259). I observed several examples of tensions and polarities at each phase of the model to adopt a racial equity stance. Rather than fall victim to the either/or thinking inherent in paradox, we worked to negotiate both/and solutions when they were available

to us. Table 17 summarizes these examples, illustrating the movement from either/or to both/and in each stage of the model to adopt a racial equity lens.

Table 17.

Examples of Managing Polarity in the Model for Advancing Racial Equity

Polarity	Either/Or Thinking	Moving to Both/And
<i>Education: Developing Cultural Competence</i>		
Readiness and Awareness	<p>Should we work to bring all staff along, OR focus on the staff who already have experience in racial equity?</p> <p>Do all staff members need to have the same level of education and understanding, OR does this vary depending on position?</p>	<p>Necessarily staff and board will be at various places along the continuum of readiness and awareness. We want to engage all members of the organization AND we recognize that not everyone needs to have (or can even have) the same level of education and understanding to do their jobs effectively.</p>
<i>Training: Increasing Readiness for Change</i>		
Boundary Management	<p>Is it possible for me to keep my personal experiences private, OR do I need to disclose my experiences and become vulnerable to a part of our racial equity work?</p>	<p>Working towards racial equity is deeply personal work, necessitating honest self-examination and authentic conversation. We can choose how much of ourselves to reveal AND maintain boundaries that keep us safe.</p>
Sequencing and Pacing	<p>Racial inequity is urgent and powerful; we need to respond accordingly.</p> <p>Are we moving too fast, OR are we moving to slow?</p> <p>Can we start developing racial equity strategy now, OR do we need to finish doing personal growth work and developing cultural competence?</p>	<p>The nature of change, in particular intra-personal and organizational change, is chaotic—moving fast AND slow at various moments and at the same time. Deep change, deep equity takes time—it is life's work.</p> <p>Strategy development is important as is personal growth—the two inform</p>

each other AND both will never be “finished.”

Changing Conversations: Developing New Points of View

**Participation
(Caucusing)**

Should we engage in trainings as a full organization (board and staff), OR divide trainings (one for board and one for staff)?

Should every member of the staff engage in training, OR should trainings be divided in some other meaningful way?

The reframe for these either/or statements is that we need to focus on both full group learning AND subgroup (otherwise known as caucuses) spaces for similarly-situated people to process, reflect, and heal. Both approaches facilitate community building within the organization.

**Surfacing Values and
Challenging
Assumptions**

Are we talking about our personal values, OR are we talking about values around race and racism?

Either I discuss my beliefs, experiences, and assumptions about race, which will distance me from my co-workers, who may come to view me as a bad person, OR I just won't participate so as not to feel vulnerable.

The nature of race—in that it is a social construct that influences everyone's lived experience—means that our personal values and our values around racism are inextricably linked. Awareness of how they are linked is not a given and can be difficult and painful to develop.

This is similar to boundary management. It is likely that courageous conversations will change interpersonal relationships AND it is possible that they will be enriched by authentic dialogue. You can also engage in courageous conversations AND be attend to your emotional and psychological needs.

Changing Behavior: Building Capacity for Emergence

Ambiguity Avoidance	We can't start the new work until we have a clearly defined stance, strategy, and performance measurement system.	The nature of rapid, complex change—racial equity is inherently complex—means the planning will never finish. We can develop a stance AND develop adaptive strategies that respond to complexity AND these activities cannot happen in the vacuum of a conference room.
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Changing Behavior: Examining Policy and Practice

Strategic Focus	Are we developing a racial equity lens OR a racial and ethnic equity lens?	Moving out of the race-ethnicity binary, we find space for intersectionality—an equity lens can address both race AND ethnicity (and gender, sexual orientation, ability, and many other forms of difference).
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Polarity management is an important concept in the field of organization development and management. Johnson (1998) developed a polarity management model through which he discussed the value of both problem-solving (either/or thinking) and polarity management. Johnson (1998) explained that polarities have two or more right solutions that are interdependent (p. 4). Again, targeted universalism can be understood in the frame of polarity management. Manderscheid and Harrower (2016) conducted a qualitative study to learn more about polarity in the context of leader transition, a phenomenon that has similar challenges as significant strategic change and organizational redesign. Their research identified five key polarities: (a) Drive Change/Maintain Status Quo, (b) Work/Family, (c) Tradition/Innovation, (d) Action/Reflection, and (e) Task/Relationships. The first polarity—drive change or maintain the status quo—is a

familiarly felt phenomenon in organizations going through any change, large or small, and was present during the first 11-months of the Meyer Foundation's racial equity initiative. Boundary management, for example, is a heartfelt plea to maintain the status quo as well as a desire to prioritize task over relationship.

Limitations of the Study

A limitation of this study is the sample size, as the action research was conducted at one foundation with 26 members. While the narrative overview in Chapter 4 was validated with two members of the organization, another limitation of the study comes in the form of my own biases and perspectives. To acknowledge observer bias, I disclosed the personal significance of the study and my shared my perspective about the current state of race and philanthropy in the United States. However, it is given that the dynamics and conclusions I described in Chapter 4 are influenced by my history, lived experiences, and point of view. The observations and inferences of a different researcher conducting this study in the same context would necessarily have other nuances than what is presented in this paper.

Another limitation of this study was my own capacity to fulfill multiple roles (sometimes concurrently and in conflict with each other) during the 11-month initiative. This was indicated in excerpts from my field journal. As researcher-participant, project manager, staff member, and change agent, my attention was pulled in several directions and there weren't enough hours in the day to devote 100% of my time to each role.

There were also some limitations in the access I was granted throughout the change process, mostly the result of the conflicting aspects of the roles I filled. As a researcher-participant and project manager, I had more access to organizational

leadership during the change process than I would have if I were staff member going through the change process. However, since I was still a staff member (as opposed to an external consultant) and not on the senior leadership team, there were elements of the change process, such as decision-making and budgeting, for which I did not have full access.

Areas for Further Research

Future researchers should be encouraged to expand upon this study by conducting action research at additional foundations engaged in adopting a racial equity strategy, as well as entities in other sectors that are also interested in embedding an equity lens in their strategy and operations. A growing trend in philanthropy is the notion that to have long-lasting impact it is critical to identify the root causes of entrenched social problems, rather than treating surface-level manifestations of the social problem. Both approaches are necessary; however, the former requires a higher level of analysis to understand the complexity of social challenges. With respect to systemic racism, adopting a racial equity lens enables organizations to “uncover patterns of inequity” and “separate symptoms from causes” (GrantCraft, 2007). Additional research will help both the organization development, philanthropy, and racial justice fields better understand how organizations adopt a systems worldview (one that identifies patterns of inequity) and develop promising practices for institutionalizing that worldview. Because of their role in defining, reinforcing, and exacerbating systemic challenges, further research is also needed on the processes and dynamics in the business and government sectors.

Another area of future research is the role of culture in philanthropy. I commented on the nature of power and privilege in philanthropic institutions, especially with respect

to the power dynamics between funder and grantee, and funder and the community.

While research and attention to culture in philanthropy is growing, due to membership organizations like Grantmakers for Effective Organizations, Independent Sector, and the D5 Coalition, foundations do not have a lengthy history examining and strengthening organizational culture. Williams, Brenner, and Celep (2016), wrote:

“There are different reasons why foundations don’t focus on culture. One is that grant makers don’t face much pressure to think about the internal culture of their organizations and how they might use it to drive external outcomes. That’s in contrast to the business world, where building and maintaining a strong culture is important because employee and customer satisfaction drives the bottom line. Break open Forbes or Fast Company and you are likely to see articles emphasizing how central corporate culture is to delivering on a brand’s promise.” (para. 8)

To authentically and effectively engage in racial equity it may be important for foundations to have tools and practices to develop strong cultures that promote and sustain equity values, and that foster trust and courage to have the difficult conversations it takes to arrive at a coherent approach to racial equity work. Additionally, a further area of research is the relationship between cultural competence and a racial equity mindset in organizations.

Conclusion

Tackling racial equity and envisioning a community in which systemic racism no longer exists are big, audacious goals, and the Meyer Foundation is a newcomer to a generations-long fight for racial justice. To be authentic contributors to this work and conversation, the Meyer Foundation, after seeking counsel from other foundations that have adopted similar frames, embarked on an initiative to build internal capacity and change its organizational culture. What we learned through this initiative is that the work of racial equity is personal, and therefore more challenging than we initially anticipated.

Organizational change is hard and organizational change that directly touches and impacts the core of people's identity, sense of fairness, and deeply held worldviews (sometimes unearthing new insights that are difficult to swallow) is exponentially harder and needs to be treated with great care, empathy, and skill.

There is much work ahead within the Foundation: building new muscle for race equity, courageous conversations, and emergent thinking as well as embedding the racial equity stance and mindset in the organization's external-facing strategy. Even still, at the end of the 11-month initiative, my colleagues and I are encouraged. Because of the commitment and hard work the board and staff invested, the Meyer Foundation has taken important first steps on the path to become an authentic partner in creating a world in which systemic racism and its consequences no longer exist.

Every foundation has a unique organizational culture, internal circumstances, and external pressures, but foundations (especially those that are equity-minded) bear the same responsibility to acknowledge and account for their relative position of power and privilege in the communities they serve, the same call to urgent action that several foundations have already started heeding. It is my hope that this case study offers practitioners and foundation leadership hope, inspiration, and possibly a framework for starting the journey.

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Appendix A: MAG Survey and Interview Protocol

Survey DRAFT Protocol
Meyer Foundation – Racial Equity Organizational Development
Management Assistance Group (MAG), v.1/21/16 (SP)

Opening & Overview of the Process:

(To be edited to include: Overview and reminder of the process, how the data will be used in combination with interviews and background docs, next step and relationship to alignment sessions, and instructions on how to use the rating system reflecting on a range of qualitative and quantitative data that they may be familiar with, as well as a felt-sense of the organization, as triangulated, valid data sets):

This survey focuses on the institutional level. How do processes, structures, functions, standards, and culture support or detract from equity – both within the Foundation and in terms of the Foundation’s role in grantmaking and regional leadership. The survey intentionally focuses on racial equity, although there are some questions about other areas such as immigration status, age, gender, LGBTQ, religion, ability, etc. This tool can become a baseline that the Foundation uses periodically to assess its progress.

(We will also include definitions of the following:)

- Diverse (beyond only race, unless the question indicates “race”)
- Demographics
- Structural Equity – encompasses, but moves beyond racial equity; includes disproportionate impacts, as well as a regional lens, etc.

SCALE:

- 1) Strongly Disagree
- 2) Disagree
- 3) Neither Disagree nor Agree
- 4) Agree
- 5) Strongly Agree
- 0) Don't Know

1. Vision, Mission, Values

- a. Our *espoused* vision, mission, and values sufficiently reflects our racial equity focus.
- b. The way we *embody* our vision, mission, and values sufficiently demonstrates our racial equity focus.

2. Leadership

- a. Our board leadership is diverse enough to represent the racial demographics of all communities we serve.
- b. Our staff leadership is diverse enough to represent the racial demographics of all communities we serve.
- c. Our board recruitment committees are diverse enough to represent the racial demographics of all constituencies we serve and seek to recruit.

- d. Racial equity is sufficiently prioritized in board recruitment processes.
- e. The board orientation process adequately ensures that board members understand the Foundation's commitment to racial equity.
- f. The board orientation process adequately ensures that board members understand how racial equity applies to the board's role.
- g. I have sufficient support to develop a racial equity lens.
- h. Our board and staff leadership deal skillfully with conflicts as they arise.
- i. Our formal processes are sufficient for retaining a racially diverse board.

3. Planning

- a. We engage representatives from the communities we serve in all phases of our planning processes. These phases include design, analysis, implementation, and cycles of reflection and improvement.
- b. Representatives from the communities we serve are deeply engaged in our planning processes. Deeply means that they are involved in decision-making, implementation, and/or learning beyond being informed or consulted.
- c. Our decision-making processes are very clear to me.
- d. We sufficiently include diverse staff in decision-making processes.
- e. We sufficiently include diverse board members in decision-making processes.

4. How well do the following types of policies include a racial equity lens? For each type of policy pick one answer.

- a. Personnel policies
- b. Board governance policies
- c. Grantmaking policies
- d. Vendor relations policies
- e. Partnership policies
- f. Communications policies
- g. Financial management policies
- h. Investment management policies

Scale for Question #4:

- 1. Racial equity is absent
- 2. Racial equity is minimally present
- 3. Racial equity is emerging (being developed)
- 4. Racial equity is present (fully built out)
- 5. Racial equity is present and implemented so well that it could be an exemplar for others
- 0. Don't Know

5. Organizational Culture & Climate

- a. Our physical workplace adequately reflects the diversity of our region.
- b. Our work environment encourages constructive reflection and dialogue about perceptions, opinions, biases and prejudices.
- c. How well does our culture welcome diversity around the following demographic categories?

- i. Racial (relating to physical characteristics)
- ii. Ethnic (relating to cultural characteristics)
- iii. Gender or gender identity
- iv. Age
- v. Ability
- vi. Sexual orientation
- vii. National origin
- viii. Immigration status
- ix. Socioeconomic status
- x. Religion
- xi. Other areas? (2 places to write-in optional)

Scale for Question #5c:

- Extremely Welcome
- Somewhat Welcome
- Neither Welcome nor Unwelcome
- Somewhat Welcome
- Extremely Welcome

6. Collaboration Structures, Processes & Relationships

- a. We continually get feedback from the racially diverse communities we serve.
- b. We have adequate structures or processes for joint learning and evaluation with the diverse communities we serve.
- c. Representatives of the diverse communities we serve play both leadership roles in all Foundation-funded initiatives.
- d. Our meetings adequately engage various styles of communicating and thinking – affective, intellectual, intuitive, linear, and non-linear styles.
- e. The norms for how staff engage in racial equity conversations are sufficiently clear.
- f. The norms for how board engage in racial equity conversations are sufficiently clear.
- g. I feel safe to bring my full self – including all my identities and cultures – to the Foundation.
- h. There is sufficient trust among the staff to more deeply pursue racial equity in the Foundation’s work.
- i. There is sufficient trust among the board to more deeply pursue racial equity in the Foundation’s work.

7. Human Resources, Performance Management, Personal Reflection, Commitment and Accountability

- a. Racial equity is sufficiently prioritized in recruitment processes for staff positions at every level of the Foundation.
- b. We have sufficiently diverse pipelines of recruiters, social networks and other relationships that support us to use an explicit racial equity lens in hiring.
- c. Our hiring committees are diverse enough to represent the racial

- demographics of all constituencies we serve and seek to recruit.
- d. The staff orientation process adequately ensures that staff members understand the Foundation's commitment to racial equity.
 - e. The staff orientation process adequately ensures that staff members understand how racial equity applies to their role and performance expectations.
 - f. There is sufficient support for staff members to develop a racial equity lens.
 - g. Our formal processes are sufficient for retaining a racially diverse staff.
 - h. The pathways for advancement provide sufficient opportunities for racially diverse staff to grow at the Foundation.
 - i. Our processes are sufficient to promote the leadership of staff of color.
 - j. Staff from various racial backgrounds are sufficiently supported to bring their gifts (i.e., skills, talents, perspectives, relationships, etc.) to the work.
 - k. Our compensation approach reflects our racial equity values.
 - l. We have sufficient mechanisms to address staff complaints about racial inequity and barriers to opportunity in the Foundation.

8. Grantmaking and Engagement with Grantees

- a. Our grantees' staff and board leadership is diverse enough to represent the racial demographics of all communities we serve.
- b. Our processes are sufficient to ensure that the racial demographics of our grantees' constituents adequately reflect the low-income communities of the region.
- c. Racial equity is sufficiently prioritized in grantee selection processes.
- d. Our grantee selection process sufficiently considers the ways in which potential grantees are situated differently because of the legacy of discrimination.
- e. Racial equity is sufficiently incorporated into the strategy for grantmaking initiatives.
- f. We include an explicit focus on advancing racial equity through the work that grantees are advancing, in our screening and selection processes.
- g. We regularly work with our grantees to ensure that payment schedules recognize and support how they may be situated differently financially.
- h. We are sufficiently flexible in our grantmaking processes in making adjustments to the original grant agreement and outcomes/impact, as may be needed by our racially diverse grantees.
- i. We sufficiently engage those most negatively impacted by racial inequity in our grantmaking decisions.
- j. We regularly map the power and influence of our potential and current grantee partners, using a racial equity lens.
- k. We regularly share disaggregated data on demographic diversity in our grantmaking.

9. Capacity Building Approaches

- a. Our analysis of ‘high capacity’ or ‘high functioning’ sufficiently takes into account the history of power, privilege, and institutional racism, and their impact on the current and needed capacity/functioning of those we invest in.
- b. Our investments in capacity building sufficiently includes different types of support that grantee partners may need given their history of power, privilege and potential oppression.
- c. There is sufficient support for grantee partners to develop a racial equity lens.

10. Vendors

- a. Our vendors are diverse enough to represent the racial demographics of all the communities we serve.
- b. Racial equity is sufficiently prioritized in our vendor selection processes.
- c. We always select vendors with a focus on racial and other forms of equity.

11. Partnerships and Field-Building

- a. Racial equity is sufficiently prioritized in partner selection processes. These are non-grantee and non-vendor partners.
- b. Our partners are diverse enough to represent the racial demographics of all the communities we serve. These are non-grantee and non-vendor partners.
- c. We have sufficient processes to expand our social networks to broader racial demographic communities.
- d. We regularly identify potential partners that have both a strong understanding of racial equity *as well as* influence in the region. These are non-grantee and non-vendor partners.
- e. We always engage with partners to alter the balance of power and influence in the region toward those with a focus on racial equity.
- f. We continually learn about marginalized families and communities that we support, including both the positive and challenging conditions of their lives.

12. Convening & Advocacy

- a. Our agenda around advancing racial equity in the region is sufficiently explicit.
- b. Our convenings always include a focus on racial equity (along with other goals).
- c. There is sufficient support for convening attendees to develop a racial equity lens.
- d. Our advocacy always includes a focus on racial equity (along with other goals).

13. Communication Systems

- a. Racial equity is sufficiently incorporated into our communications strategy.
- b. Our internal communications sufficiently embeds ways to deepen a racial equity lens for our staff and board.
- c. Our external communications sufficiently embeds ways to deepen a racial equity lens for our grantees, partners, and constituents.

- d. We regularly assess our internal communications for appropriate racial equity messaging.
- e. We regularly assess our external communications for appropriate racial equity messaging.

14. Analysis and Focus on Context, History and Power

- a. We have sufficient structures and processes for all levels of staff to deepen their understanding of history, power and privilege in the region.
- b. We have sufficient structures and processes for the board to deepen their understanding of history, power and privilege in the region.
- c. We regularly reflect on how the Foundation's power, position, resources, relationships, and influence might be more strategically leveraged to yield greater structural (inc. racial) equity in the region.

15. Evaluation and Measuring Success

- a. Structural (inc. racial) equity is sufficiently incorporated into our learning and evaluation strategy.
- b. Structural (inc. racial) equity is sufficiently incorporated into our understanding of success, impact and outcomes.
- c. We sufficiently track both qualitative and quantitative metrics about structural and racial equity.
- d. All levels of staff regularly reflect on qualitative and quantitative metrics about structural (inc. racial) equity.
- e. The board regularly reflects on qualitative and quantitative metrics about structural (inc. racial) equity.
- f. We have sufficient processes for celebrating positive outcomes related to racial equity.
- g. We have sufficient processes for course-correcting substandard outcomes related to racial equity.

16. Financial Management and Analysis

- a. Racial equity is sufficiently incorporated into our analysis of the financial impact of our investments.

17. Are there any **salient aspects of your identity or culture** that could be better embraced institutionally? If so, what aspects? (30 word limit)

18. **What is one specific “action learning” opportunity?** This is an opportunity that the Foundation could use to refine an existing approach or test a new approach to implement a racial equity lens. It could be internal or external work – any organizational function, process, program, approach, partner, vendor, policy, or any other area. (15 word limit)

Demographics to collect:

- Age (under 30; 30-40; 40-50; 50-60; 60+)
- Race (White, Af Am, As Am/PI, Nat Am, Middle East, Latino, Multiracial)
- Gender [M, F, trans(/gender-queer?)]
- Role:
 - Management/Leadership
 - Board Officer
 - Other Board Member (not an officer)
 - Support Staff/Assistant/Admin
- Tenure [less than 1 yr; 1-5 yrs; 5-10 yrs; 10+ (or just 5+)]

Interview Protocol (FINAL)
Meyer Foundation – Racial Equity Organizational Development
Management Assistance Group (MAG), v.1/15/16 (SP)

Opening & Overview of the Process:

- A. Thank you for your time. (Introduce yourself.)
- B. We'll spend about 45 minutes in the interview.
- C. I'd like to share a bit of background information about the project if that would be useful. [**Some folks might not need this, if they are very familiar with the work. In which case, you can dive right in. Ask if they feel they need it. You may not need all of what is below. But it is here in case questions come up that you need to answer. You can also go in the order you think is best.**]
- D. The process is being facilitated by the Management Assistance Group (MAG), and I'm a Senior Consultant (or Associate Consultant) with MAG.
 - o MAG is a 35-year old social justice consulting firm. We work with foundations, nonprofits, businesses, universities, and other types of institutions both nationally and internationally.
 - o We focus on organizational development and movement building. We partner with organizations and networks to build capacity to help produce a more just, healthy, thriving world for everyone.
- E. This work builds off of the Foundation's historical focus on supporting low-income communities to thrive, as well as the Strategic Planning process, which surfaced the need to undertake explicit work around equity and racial equity, to deepen the Foundation's capacity to achieve its mission in the region.
 - a. (*For staff and board, you can also ask if they read the RFP for this work, issued last fall, that will also give them a sense of the impetus for the work.*)
- F. The process is designed to build board staff, board and institutional **capacity** and has several intended outcomes:
 - a. A shared individual and group **assessment** of internal, interpersonal, institutional and structural/systemic dimensions of equity within the Foundation;
 - b. **Skill-building** and **shared understanding** of key terms & concepts (e.g., privilege, power, oppression, equity, justice, etc.); deepened personal and interpersonal awareness of history, culture, unconscious bias, structural inequity; and increased compassion and empathy among staff and board;
 - c. **Clarity about implications for key functional areas in the Foundation** such as governance, staffing and retention, operations, organizational culture, communications, partnership, and grantmaking; and **embedded structures** to support the on-going, successful integration of equity into the Foundation's work;
 - d. Increased **confidence** and greater **capacity** to potentially function as a racial equity leader in the region; and
 - e. A **strategy framework** to guide the Foundation's internal and external work going forward.

- G. The process includes *document review*, *interviews* (with all board, all staff, and 4 external individuals), and a *survey*. [**The following are only if they ask:*]
 - a. While the interviews will focus on individual awareness and lens, the survey will focus on institutional functions, structures, processes, culture, etc.
 - b. The survey will be administered the first couple weeks of February.
- H. This process will take place **through September** of this year.
- I. Everything you share will be confidential and only available to MAG.
 - a. The data will be aggregated across individuals (board, staff and external people) to preserve anonymity.
 - b. So, please feel free to be as candid as you feel comfortable.
- J. Do you have any questions before we begin?

Internal Foundation Questions (for Board & Staff)

1. Please share a bit about your role in the Foundation and how long you've been with Meyer (as staff or board member, as appropriate to the interviewee.)
 - a. If you've been with the Foundation for awhile, how has your role evolved or changed over time?
 - b. Why did you choose to join to the Foundation? What drew you?
 - i. For Board members: *Why did you choose to serve on the Board when invited?*
2. What prompted this work around racial equity in the Foundation?
 - a. For those with tenure: *What history or precedents is this work built on?*
 - b. For the Board and Nicky: *What was the charge from the board to a new President?*
3. When and how did you first become aware of issues of equity, culture, power, privilege and other areas (relating to race, socioeconomics, gender, LGBT, oppression, or other categories)?
4. What are the most significant dimensions or aspects of a focus on equity, from your perspective?
 - a. What language or terms do you use (or prefer) in your own life and work to describe these dimensions?
5. How does equity & inequity shape or inform how you currently do your work / perform your role (internal and external to the Foundation)?
6. What supports do you currently have in your life and work for deepening your awareness, learning and capacity?
 - a. What supports do you need?
7. What excites you about this process? What are your hopes for this process in the Foundation? What would you like to see or be proud of as a result of this process?
 - a. For Board, add: *Why did you support this work moving forward?*
8. How might this process inform the implementation of the Foundation's new strategic plan?
9. What concerns or fears do you have about this process:
 - a. For yourself?

- b. For the organization?
- c. For the community and/or the Foundation's partners?
- 10. What advice do you have for the Foundation and for the consultants in this process?
- 11. Do you have any additional thoughts or questions?

Questions for External Participants

Opening & Overview of the Process:

- A. Thank you for your time. (Introduce yourself.)
- B. We'll spend about 45 minutes in the interview.
- C. I'd like to share a bit of background information about the project if that would be useful. [**Some folks might not need this, if they are very familiar with the work. In which case, you can dive right in. Ask if they feel they need it. You may not need all of what is below. But it is here in case questions come up that you need to answer. You can also go in the order you think is best.**]
 - a. For 70 years, the Meyer Foundation has focused its grantmaking on supporting low-income communities to thrive.
 - b. The Foundation had a change in leadership in mid-2014, and began a strategic planning process that same year.
 - c. The strategic planning process surfaced racial inequity, in particular, as a root cause of disproportionate economic impact on the individuals and families the Foundation primarily serves.
 - d. As a result, the Foundation sought consulting support to help build staff, board and institutional capacity in racial equity.
- D. The process has several intended outcomes:
 - a. A shared individual and group **assessment** of internal, interpersonal, institutional and structural/systemic dimensions of equity within the Foundation;
 - b. **Skill-building** and **shared understanding** of key terms & concepts (e.g., privilege, power, oppression, equity, justice, etc.); deepened personal and interpersonal awareness of history, culture, unconscious bias, structural inequity; and increased compassion and empathy among staff and board;
 - c. **Clarity about implications for key functional areas in the Foundation** such as governance, staffing and retention, operations, organizational culture, communications, partnership, and grantmaking; and **embedded structures** to support the on-going, successful integration of equity into the Foundation's work;
 - d. Increased **confidence** and greater **capacity** to potentially function as a racial equity leader in the region; and
 - e. A **strategy framework** to guide the Foundation's internal and external work going forward.

- E. You've been asked to participate, given the depth of your work, to provide the Foundation with valuable perspectives on what's needed and what's possible around equity in the region.
- F. The process is being facilitated by the Management Assistance Group (MAG), and I'm a Senior Consultant (or Associate Consultant) with MAG.
 - MAG is a 35-year old social justice consulting firm. We work with foundations, nonprofits, businesses, universities, and other types of institutions both nationally and internationally.
 - We focus on organizational development and movement building. We partner with organizations and networks to build capacity to help produce a more just, healthy, thriving world for everyone.
- G. The process includes **document review**, **interviews** (with all board, all staff, and 4 external individuals), and a **survey**.
- H. This process will take place **through September** of this year.
- I. Everything you share will be **confidential** and only available to MAG.
 - a. The data will be aggregated across individuals (board, staff and external people) to preserve anonymity.
 - b. So, please feel free to be as candid as you feel comfortable.
- J. Do you have any questions before we begin?

External Participant Questions:

1. Please share a bit about your role in the community and what prompted a focus on the work you do.
2. How does your work relate to racial equity or other approaches to equity?
3. What are the most significant dimensions or aspects of a focus on equity, from your perspective?
 - a. What language or terms do you use (or prefer) in your own life and work to describe these dimensions?
4. What types of changes have you seen in the Washington DC region over the years in terms of a focus on and commitment to equity?
 - a. What is the readiness you currently see in the region?
 - b. What strengths in the region can be built upon to advance a racial equity focus?
 - c. What key changes are still needed at this time, regionally?
 - d. What will it take to move such a focus forward, regionally?
5. What is your perspective about the Meyer Foundation taking on a focus on racial equity at this time?

- a. What role(s) could you see the Meyer Foundation in particular playing to advance such a focus and changes?
 - b. What concerns might you have about the Meyer Foundation taking on a focus on racial equity at this time?
6. What have been the most salient lessons for you in this work?
7. What advice (and/or cautions) would you give to the Meyer Foundation as they undertake this work? What things should they be thinking about?
8. Other thoughts, feedback or questions?

Appendix B: MAG Racial Equity Assessment of the Meyer Foundation

Meyer Foundation
Organizational Development Equity
ASSESSMENT FINDINGS

Management Assistance Group (MAG)

February 2016

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OVERVIEW

In response to an RFP, the Management Assistance Group (MAG) was contracted by the Meyer Foundation in January 2016 to provide organizational development support to the Foundation to build capacity in racial and ethnic equity in its institutional functioning.

Racial and ethnic equity is seen by the Foundation as core to its ability to deliver on its mission in support of individuals, families and communities in the region, and critical to the success of our new Strategic Plan. This phase of work builds off of the Foundation's historical focus on supporting low-income communities to thrive and the Strategic Planning process.

The overall process, which concludes in September 2016, consists of: 1) an **assessment** of internal, interpersonal, institutional and structural/systemic dimensions of equity within the Foundation and its work; 2) **training and alignment sessions** and **coaching** to build skill and develop shared understanding of key terms and concepts, and deepened awareness of history, culture, unconscious bias and structural equity/inequity; and 3) developing clarity about **implications for key functional areas in the Foundation** such as governance, staffing and retention, operations, organizational culture, communications, partnership, and grantmaking via developing a **strategy framework** to guide the Foundation's internal and external work going forward. This report shares the findings from the first step: the assessment.

The Planning Committee for the work includes President Nicky Goren, Program Officer Maegan Scott, Office Manager Jenny Burke, and Board Member Charlene Dukes.

METHODOLOGY

The **assessment process** included *document review*, *interviews* (with all board, staff and one external participant), and a *survey*. The interviews focused on individual awareness and lens, and the survey focused on institutional functions, structures, processes, culture, etc. The interviews were conducted and survey was administered during the first part of February 2016.

Document Review

MAG requested and reviewed a range of documents including those on: strategy and strategic planning documents; any previous and current related efforts to race and equity, and conclusions, successes and sticking points from these processes; demographic information about the Foundation's internal and external work (staffing, titles/roles, etc.); organizational culture development; approaches to recruitment, retention, grantmaking, partnership, convening, assessment and evaluation; and documents on equity conditions in the region. Results from review of this information were incorporated into the interview and survey findings below.

Interview Methodology

The interviews consisted of eleven (11) open-ended questions ranging from: participants' histories within the Foundation; their perspectives on the impetus for the work around equity; their understanding of the most salient dimensions of a focus on equity; how such a focus informs their work; supports they have or need for continued personal and professional development; hopes and fears for this process; and advice for the Foundation and consultants.

Each member of the board and staff plus one external individual, was interviewed for approximately 45-minutes. The interviews were conducted as confidential 1-on-1s with a member of the MAG team. A total of 24 interviews were conducted. The Foundation's intention was to include four external participants, but due to scheduling, was only able to secure the participation of one. Because the staff and board are small, and several types of diversity are limited within the Foundation, data was aggregated across individuals (board, staff and external participant) to preserve anonymity.

Survey Methodology

MAG conducted a survey of staff and board to develop a baseline understanding of how well racial equity is infused into the institution. The survey explored how processes, structures, functions, standards and culture support or detract from equity – both within the Foundation and in the Foundation's role in grantmaking and regional leadership. Sixteen dimensions of institutional ethnic and racial equity were assessed, including sub-items under each:

1. Mission/Vision/Values
2. Leadership
3. Planning
4. Policies
5. Organizational Culture and Climate
6. Collaboration Structure, Processes, and Relationships
7. Human Resources, Performance Management, Personal Reflection, Commitment and Accountability
8. Grantmaking and Engagement with Grantees
9. Capacity Building Approaches
10. Vendors
11. Partnership and Field Building
12. Convening and Advocacy
13. Communication Systems
14. Analysis and Focus on Context, History, and Power
15. Evaluating and Measuring Success
16. Financial Management and Analysis

For each dimension, survey questions were structured to assess a minimum standard of performance, and respondents were asked to rank each item on a scale of 5: “strongly disagree (1),” “disagree (2),” “neither disagree nor agree (3),” “agree (4),” “strongly agree (5),” or “don't know (0).” In interpreting the results, we consider that the standard is met when the average rating is above 4. We consider as “needing improvement” those average ratings below 2.6, meaning that respondents tended to disagree that the standard was met. Twenty-one (21) people (out of 23 total of board and staff members) responded to the survey, and one person did not complete the demographic information.

Please see the *appendix* for a summary of select survey data tables, as well as the interview and survey questions.

SUMMARY OF OVERALL THEMES

Interviews: Individual Awareness

Perspectives on this Process and Impetus for the Work

There is great general excitement and enthusiasm for the Foundation's work on racial and ethnic equity, with minimal exception. Most everyone is genuinely excited about the potential for this process for deepening knowledge and broadening and deepening the Foundation's impact. The value and appreciation for Meyer and its reputation and influence in the region and field is clear to all, with one participant noting that it's "*long overdue*."

Some noted that, historically, there was internal recognition inside the Foundation that race was a driver in the work, but this was "*never acknowledged publicly*." Participants noted that, "this is the first time we're talking about race *institutionally*." Though previously there was autonomy among program officers to incorporate this lens, "*there wasn't support at the highest level to take it on, until now*."

There was also admonition by some board members that the Foundation make sure to maintain a focus on racial and *ethnic* equity. They noted that, "*There may be different causes [for inequity] and hence different solutions*." They also noted that it will be important to broaden the discussion beyond the important "black-white" paradigm and legacy of the region, to include focus on the specific conditions of immigrant communities as well.

Desires Expressed for This Process

Participants shared their hopes and desires for this process, ranging from: *shared language* to use both internally and externally; to *measures and outcomes* that can be used to focus capacity building and track progress, while acknowledging that some areas cannot be measured and the process may not be linear; *honest dialogues*; and clarity about how Meyer can and should show up and *partner* with community in a culturally responsive way. Participants also made specific connections to how this process should inform implementation of the strategic plan, and how the work will need to be "fully embedded, updated regularly," and pursued for the long-haul.

Comments included:

- "*I hope to have something every board and staff member feels confident expressing*."
- "*I hope we'll be able to talk about it across staff and board in an open and non-threatening way*." "*We can create an environment and talk about differences without anger or guilt; with a goal of understanding*."
- "*Meyer has a role in educating people*." "*We could change dialogue, vocabulary, grantmaking and joint action*." "*Meyer is very respected in the DC area, could*

lead hard conversations, and convene players to talk about changes in the region.”

- *“People from the community should be spokespeople. How do we lift them up?”*
- *“We need to think about how to keep people in the field updated about what we’re learning.”*

Development of Equity Awareness

Participants discussed their own development of an equity lens, what drove this in their early lives and careers, what supports or impediments they have experienced, and how that lens or growing awareness has evolved.

For some staff and board members, their life experiences exposed them to a range of diversity and difference and also cultivated an equity lens. This varied across demographic backgrounds. For some, equity awareness developed either in reaction to *or* with the support of family. This also varied across demographic backgrounds. For others, engaging with difference was focused on “sameness” and “not seeing color,” with the notion that “seeing color” was itself a form of racism. This was noted only by white staff and board members. *“I was taught, if we treat everyone the same and pretend we don’t see race, this problem will be solved eventually.”*

Participants expressed epiphanies around expecting people of color to raise equity issues, being surprised when this didn’t happen, and realizing that the role of whites who have this awareness and desire is powerful, important and valuable to lead and model (even if it’s new, there is uncertainty, and much is still being learned).

Some board and staff, both white and people of color, are also developing a significant awareness of and comfort with “institutional racism,” “structural racism,” power, privilege and using these terms. Participants mentioned, *“We are often focused on injustice globally, but we really need to look at what’s happening in this country too.”*

Use of Terms and Language

Participants discussed their uses of language and preferred terms in pursuing equity work. For most, this is a developing area, while for others specific terms are found to be potent and useful in advancing an equity lens and practice. These terms include: the appropriateness and challenges of the term “equity”; making sure to avoid terms that may be paternalistic or “coded language”; and strategically using stronger terms such as “oppression,” “privilege” and “power,” as these can be valuable in getting to deeper issues and promoting the sometimes necessary discomfort that can lead to change.

The overall admonition in this area was that, terms need to be useful for the audiences they are being used with, and the Foundation needs to develop its own vocabulary that it is comfortable with to speak to its partners and constituents.

Impact of an Equity Lens on Their Role

Participants discussed how a developing equity lens should impact how they perform their role in the Foundation. For some staff and board, this was relatively clear in terms

(for example) of grantmaking, partnering, hiring and board recruitment, even if the details of implementing these areas were still being discovered. For others, equity is still a developing or amorphous lens to be built over time. Comments included the following:

- Grantmaking:
 - a. *“We need to recognize that even if our policies and practices don't have the intent of being inequitable, they can still be inequitable. It's a new lens to look at everything.”*
 - b. *“For decades, Meyer was comfortable supporting organizations led by ‘well-intentioned’ white people trying to help ‘those people.’” “It’s a huge system that works against authentic community-based work. It’s not focused on assets.”*
 - c. *“When the leadership of an organization changes to an African American, we start to scrutinize that leadership more. This isn’t fair.”*
 - d. To address these areas, in recent years, some staff have tried to be more aware of who they agree to meet with, where they go in the community, where they spend their time, and who they cultivate.
- Hiring staff and board recruitment:
 - a. Participants mentioned how the Foundation has experimented with changing its staff recruitment approaches for staff to reach out to different segments of the community where larger pools of people of color might be found.
 - b. *“Diversity isn’t just about having different backgrounds. We also need people who understand structural racism and can move an equity agenda.”*
 - c. Participants noted that the Foundation needs to do a better job of identifying Latino candidates, given the region’s demographics.
 - d. In terms of board composition, all board members are over 50, all are white except three, and there is a mix of male and female. *“Because we’re not a diverse board, we need to be intentional about who we bring in.” “We need to make sure they meet our criteria for a well-rounded board.”*
- A great deal of staff, particularly on the operations side but not exclusively, did not have a strong sense of how equity informed their work. Staff wonder how to make such a lens more systematic and thorough, and are eager for tools, resources and supports.

Supports Participants are Using and Desire for Their On-Going Growth

Staff and board shared a range of resources and approaches they are using to develop and continue to strengthen an equity lens. For most, these resources are limited to reading books and articles. Some also have colleagues or family members who support their deepening capacity, and a very few participate in groups such as other boards, as venues for growth in equity. Almost no participants are currently taking advantage of formal trainings around equity, and wonder whether these may be for novices or whether there are advanced trainings available.

Some participants also have a challenging and valued practice of intentionally developing new relationships and experiences outside of their “comfort zone” of familiar

demographic peers and communities. Finally, there is a great desire by nearly all for more support in this area. The task will be to determine what of this developmental support is appropriate for the Foundation to provide, and what is up to the discretion of individuals. Comments included the following:

- *“When I attend a training, my first reaction is usually skepticism and reluctance to hearing. Then, after hearing more, I feel deep shame and guilt. And then I get inspired to do something about it.”*
- *From a white staff person: “There are many aspects to these issues that require education – mostly education of white people. That might be necessary before we can get to dismantling the structures and the norms that have been created.”*
- *“We don't understand how much inequity is embedded in society; how it's been part of the system for a long time.”*

Challenges and Cautions to Equity Work Identified by Participants

Staff and board noted a number of cautions to pursuing work on equity within the Foundation, including: (a) the difficulty for many in focusing on “white privilege” in a way that strengthens relationships, deepens understanding, and clearly acknowledges the value of everyone, from every background; (b) the need to authentically engage with communities of color; (c) the Foundation’s lack of credibility in this area; (d) developing the skill, language and confidence to speak to the relevance of a focus on equity in the Foundation’s work as key to achieving its mission; (e) defining and managing expectations; (f) shifting the Foundation’s culture; and (g) differing desires among both board and staff for engaging in the affective aspects of a focus on equity, with some strongly wanting it and feeling that it is crucial, while others want to make sure that any such focus is done skillfully. Specific comments included the following:

- Participants expressed that, for many people who are white and come from low-income backgrounds, the notion of “white privilege” is difficult to accept: *“There’s lots of resistance to topic in this area. It’s important that Meyer is talking about it.” “Lots of people are closed off to this; lots of this isn’t conscious. Why is this uncomfortable? What are we afraid of? It’s an opportunity to be vulnerable individually and institutionally.”*
- There is a clear recognition that Meyer does not speak for the communities it serves:
 - *“There’s a difference between who’s doing the work and who’s financially supporting it.”*
 - *“We need to engage with communities of color authentically.”*
 - *“We need to be sure the communities we serve are at the table.”*
 - Significant partnerships will be needed (e.g., an Advisory Group knowledgeable about racial and ethnic equity) to drive a deep focus on equity.
- On messaging externally: *“We need to show how the current work is not going to get us where we want to go” without a focus on equity.”*
- On embracing risk: *It’s important for the Foundation to have a “realistic understanding of risks involved and to embrace the risks.”*

- On culture change: *“The historical culture at Meyer has been very ‘polite.’ This can be a positive thing. The negative part of this is that things that need to get said, don’t. This has shifted a bit since Nicky has come.”*
- Operations & program staff: We also heard repeatedly from participants in operations that because they are (for example) not going on site visits, involved in grants, etc., they want a greater connection to how the Foundation pursues its mission.

Fears & Concerns about This Process

Staff and board raised areas where they want to ensure that this process is done with care and attention for both individuals as well as the organization, including: (a) ensuring that the successful work that has been with staff around organizational culture is strengthened and not compromised; (b) not repeating past negative experiences with diversity trainings; (c) fears about “getting it wrong” or making mistakes in the work in communication and messaging, internally and externally; and (d) making sure the process meets each person where s/he/they are and supports their continued growth. Comments included:

- *“Make sure we assume good intentions when listening to each other.”*
- *“We don’t want anyone to go home feeling like they don’t belong here.”*
- *“Lots of people are worried we might say the wrong thing. The only requirement is to be open and willing to work.”*
- *“Culture change is hard. This anxiety is typical of someone who experiences themselves as part of a privileged class.”*

Lastly, some participants noted that the response to Meyer moving in this direction has been positive so far, while others mentioned that some constituents are concerned that this may be a narrowing of focus. (This may point to a difference in constituents for each of these respondents.) *“We don’t want people to see this as limiting our work. We want people to see that this is a lens through which we will deepen our impact.”*

Final Thoughts on What’s Needed for Success

Board and staff had a number of final areas they feel will be critical to the success of the Foundation’s work on racial and ethnic equity, including being “careful and thoughtful”; the need for both personal work as well as academic exposure, education and training; strategic communications, both internal and external; and recognition that the work is “iterative and long-term.” Comments included the following:

- *“We need to have personal and academic experience on how impact happens.”*
- *“We need to be strategic and respectful; not in a rush. There’s urgency but that shouldn’t cause us to do harm to the communities we’re serving.”*
- *“We need to create contexts for rich conversations.”*
- *“Self-awareness is number one.”*

Survey: Institutional Functioning

The 16 dimensions of institutional ethnic and racial equity assessed included: 1) Mission, Vision & Values; 2) Leadership; 3) Planning; 4) Policies; 5) Organizational Culture and Climate; 6) Collaboration Structure, Processes and Relationships; 7) Human Resources, Performance Management, Personal Reflection, Commitment and Accountability; 8) Grantmaking and Engagement with Grantees; 9) Capacity Building Approaches; 10) Vendors; 11) Partnership and Field Building; 12) Convening and Advocacy; 13) Communication Systems; 14) Analysis and Focus on Context, History and Power; 15) Evaluating and Measuring Success; and 16) Financial Management and Analysis.

There are significant differences of opinion on some of the survey items. Sometimes this variation is individual by individual, and other times this variation is linked to particular demographic categories. For instance, people who have been with the Foundation for less than a year are more likely to agree that equity is sufficiently embedded into the institution than people who have been with the Foundation longer. As another example, management staff are more likely to feel that equity is insufficiently embedded in the institution than other staff or the board. In some cases, males and people who identified as White also were more likely to feel that equity is sufficiently embedded into the Foundation compared to other people.

Please see the *appendix* for a summary of select survey data tables.

Overall Survey Findings

Participants feel that the Foundation has a strong Organizational Culture and Climate and there is significant trust among board and staff to pursue ethnic and racial equity work. They indicated positive perspectives on recruiting diverse staff and supporting staff to bring their gifts to work. They also feel that the Foundation does a good job of being flexible with grantees, ensuring that grantees' constituents reflect the low-income communities of the region, and learning enough about marginalized families and communities. Most survey dimensions rated as areas to improve including: Planning, Policies, Capacity Building Approaches, Vendors, Evaluating and Measuring Success, and Financial Management and Analysis. *Details on these areas are below:*

Strengths

Organizational Culture and Climate

Respondents feel that the culture is welcoming around all of the demographic categories, although slightly less so for ability and socioeconomic status. This bears out the findings in the interviews also about the significant work the Foundation has done on culture and its positive effects. At the same time, there is room to improve the physical workplace in terms of equity.

Areas to Improve

Planning

The Foundation could more deeply engage representatives from ethnically and racially diverse communities in planning. While there are many levels of engagement – from being informed to making decisions – participants feel that the Foundation is not sufficiently engaging representative community members at the higher levels of decision-making, implementation and learning. They also think that the community could be engaged in all phases of planning, including design, analysis, implementation and cycles of reflection and improvement. The additional area to improve in planning is engaging diverse staff and board in decision-making.

Policies

Most policies could be revised to include an ethnic and racial equity lens. People feel strongly that financial management, investment management, and vendor relations policies, in particular, could be better aligned with an equity lens.

Capacity Building Approaches

People feel that the Foundation does not sufficiently take into account the history of power, privilege, and institutional racism and their impact on the current and needed capacity/functioning of grantees.

Vendors

The Foundation could incorporate ethnic and racial equity into its vendor selection process and then follow-through in selecting vendors with a focus on equity. There are large individual variations in opinion about whether the current vendors represent the ethnic/racial demographics of the communities the Foundation serves; data may help to develop a common understanding.

Evaluating and Measuring Success

The Foundation has not sufficiently incorporated structural equity into learning, evaluation or measuring success. This includes overall strategy; defining success, impact, and outcomes; having all levels of staff and board regularly reflect on qualitative and quantitative metrics; celebrating positive outcomes related to equity; and course-correcting substandard outcomes related to equity.

Financial Management and Analysis

Most demographic groups feel this dimension is insufficient, but there are large variations in opinion about how well ethnic and racial equity is incorporated into financial analysis of investments. Data may help to develop a common understanding.

Other Dimensions

Mission/Vision/Values

In terms of the mission, vision and values reflecting the Foundation's ethnic and racial equity focus, the Foundation is further along in how it articulates this linkage than it is in embodying it on a daily basis.

Leadership

People feel that board and staff leaders deal skillfully with conflicts when they emerge. Survey respondents do not feel that the board leadership, staff leadership, or membership of the board recruitment committee are sufficiently diverse. In addition, the board overall is more satisfied with board recruitment, retention, and diversity than the staff. People who tended to feel this dimension is *sufficient* are the following groups: under 30 years old, less than 1 year at the Foundation, white and men. People who tended to feel this dimension is *insufficient* are the following groups: people between 40 and 50 years old, persons not identified as white, women and management staff. This raises questions about what it means to be sufficient in this area.

Collaboration Structure, Processes and Relationships

This dimension is complex. One clear strength is trust among board and staff to pursue ethnic and racial equity work. This is particularly true for support staff, new staff who have been at the Foundation for less than a year, and younger respondents. White respondents tend to strongly agree that there is sufficient trust. Areas to improve include having community representatives play leadership roles in Foundation-funded initiatives, and having structures or processes for joint learning and evaluation with communities. In addition, some demographic groups feel that the Foundation could improve continual feedback loops with diverse communities.

Human Resources, Performance Management, Personal Reflection, Commitment and Accountability

Strengths include recruiting diverse staff and supporting staff to bring their gifts to work. Also seen as somewhat sufficient are retention, pathways for advancement of diverse staff, and support for developing a racial equity lens. However, these last three areas are seen as less sufficient by staff members not identified as white compared to other staff, by men compared to women, and by all staff compared to the board. Areas to improve include having mechanisms to address staff complaints about racial equity and barriers to opportunities, and orientation to understand how racial equity applies to role and performance expectations. Survey respondents also see as insufficient the networks for staff recruitment, and having diverse hiring committees.

Grantmaking and Engagement with Grantees

People feel that the Foundation is sufficiently flexible in adjusting grants as needed by diverse grantees, works with grantees to align payment schedules with their needs, and ensures that grantee's constituents reflect the low-income communities of the region. Areas to improve include mapping power and influence of grantee partners using a racial equity lens, and sharing disaggregated data on demographic diversity in grantmaking. The Foundation could consider more how grantees are situated differently because of the legacy of discrimination as part of the grantee selection process, and diversify staff and board leadership to represent the ethnic and racial demographics of communities served.

Partnership and Field Building

The Foundation sufficiently learns about marginalized families and communities. Other questions about this dimension were neither strengths nor areas to improve.

Convening and Advocacy

Convenings could include more of a focus on ethnic and racial equity along with other goals. Respondents also feel that there is somewhat sufficient support for convening attendees to develop a racial equity lens.

Communication Systems

People feel that the Foundation is somewhat sufficient in incorporating racial equity into the communications strategy. Other areas rated as more insufficient included assessing external and internal communications for racial equity messaging. This is particularly insufficient among board officers.

Analysis and Focus on Context, History and Power

Staff more than board feel that there are *insufficient* structures and processes for staff or board to deepen their understanding of history, power and privilege in the region.

Consultant Observations & Reflections

Even the most reticent participants expressed excitement about this process and the Foundation's decision to focus more strongly on racial and ethnic equity. Participants generally expressed a strong sense that, if done well, the Foundation could have much broader impact. We also found the interview and survey findings corroborated each other, where there was overlap in their focus. What follows consolidates, summarizes and identifies implications for the findings.

General Equity Awareness of Participants

We share here the notion of a *developmental* continuum or spectrum of internal and interpersonal equity awareness.¹ Our observation of staff and board from this process is that there are individuals spread across the spectrum of awareness: from reticence, newness and unfamiliarity in directly addressing race and ethnicity, and discomfort; to staff and board members who 'live and breathe' equity as part of their everyday existence and way of being. This is true across racial and income groups. However, there is also a pattern of some white, male board members expressing perspectives on the earlier end of the spectrum, which tends to shy away from a specific focus on difference, race and ethnicity in favor of universalizing perspectives.

¹ See for example the *Intercultural Development Continuum* and the *Intercultural Development Institute*: <https://idiinventory.com/products/the-intercultural-development-continuum-idc/> and <http://www.idrinstitute.org/page.asp?menu1=15>. The Foundation may find use of one of these tools valuable in its support for continued individual development.

There was a strong sense that board needs development to see, hear and understand equity issues directly from both an experiential and a research basis. It will be important to work to support the on-going development of all staff and board, meeting each person where they are, providing resources, and encouraging individual initiative. Development of alignment and synergy between staff and board will be essential, as there are currently large variations within the board and within the staff. Supporting and leveraging these different capacities will be key to the success of the work.

Tensions & Polarities to Address in this Process

We identified a number of tensions and polarities that the Foundation will need to prioritize and address as part of the process of clarifying its equity lens. These are areas that are currently stalling or blocking the energy, clarity, determination and confidence of the organization in pursuing this work. Several of these tensions are interrelated. These are conundrums that MAG will engage both board and staff in during our Training & Alignment sessions, to begin to solve. They are: (1) the relationship between existing constituents and the greater diversity the foundation seeks internally; (2) clarifying and calibrating across board and staff about what the foundation means by “success”; (3) developing capacity in “*emergent* strategy”; (4) strategic messaging, framing and communications; (5) the relationship between “race” and “ethnicity”; (6) finding an appropriate balance of focus on the affective and technical aspects of equity; and (7) bridging the gap between operations and program staff’s differing relationships to the work. *Details on each of these areas are below:*

1. Relationship Between Existing Constituents and the Greater Diversity the Foundation Seeks Internally:

- a. Several board and staff noted that the demographics of board members they are seeking fit a similar type (e.g., white, affluent, older), which makes it harder to diversify the pipeline: *“Because there’s a lack of diversity in the region in these leadership positions that would be the kinds of people we want on the board. This is part of the reason we have the pipeline we have...”*
- b. Given these descriptions, we would characterize the board as a *closed system* with all the problems of any closed system. It will behoove the organization to consider how open or closed it desires to be, and the benefits and trade-offs of such choices.
- c. The keys for the Foundation here are to develop clarity about:
 - i. Why is equity important to us? Become increasingly *clear about the value of a focus on equity* to the Foundation, and the potential impact on its ability to achieve its mission without such a focus (i.e., what you may gain with such a focus and what you may lose without it);
 - ii. What does equity mean in terms of what we’re trying to accomplish? *Calibrate* among board and staff *about what “success” precisely means* in general *and* in relation to equity, so

that that success can be messaged appropriately, internally and externally; and

- iii. Why are we each important in achieving our equity-embedded mission? *Clearly communicate and demonstrate the value of existing board members and other historical constituents, as well as the value of new, diverse constituents and members, and how their presence, perspectives, experiences, networks, ambassadorship, authentic partnership, leadership and followership, etc. all contribute to the Foundation's achievement of its equity-embedded mission.*

2. **The Notion of "Success."** Participants described several scenarios about the Foundation's approach, including: supporting community members to exit communities (as opposed to supporting the transformation of communities); what is considered a "strong" leader or organization; and what is possible in embarking on equity work – all of which raise questions about the degree to which board and staff members have similar understandings of and goals for success in the Foundation's work:

- a. *"We tell a story of students from low-income families going to a program, to a good college, and moving to another community to become an investment consultant. This doesn't seem right. It seems like a strategy to solve generational poverty by emptying neighborhoods. There has to be another answer..."*
- b. *"Meyer has a series of lenses we use to look at – e.g., strength of a board and an organization. Certain kinds of organizations show up well with that lens; others don't. We know this but we don't wanna put money into other types of organizations..."*

MAG's process with the Foundation will include helping board and staff to articulate a notion of "success" that can guide both messaging as well as later, deeper articulation of expected outcomes as part of targeted strategy development and implementation. Understanding both what success is to the Foundation in this work, as well as the Foundation's specific role in achieving that success, will help to address participants' desires for actionable outcomes from this process. From the survey findings, it would also behoove the Foundation to be significantly engaged with the community in order to define success.

3. **Emergent Strategy.** We heard a strong focus on wanting to "*get it right*" (mostly from board, but also staff), which may limit the Foundation's ability to develop a culture of smart risk, evaluation/learning, and emergent strategy, which we believe is essential for this work (and much of the work required for sustainable transformation in complex social arenas).
 - a. The beginning iterations of this work can be engaged as an opportunity to build understanding, trust and learning, while developing the capacity to message appropriately both internally and externally, and securing the support to do so.

- b. As we've heard, the Foundation is "*aspiring to be an 'outcomes-focused' organization.*" Our experience with complex systems change leads to the recommendation that the Foundation build muscle in emergent strategy, where risk and on-going learning, are key. We concur that the Foundation needs to have a "*realistic understanding of risks involved and to embrace the risks.*"
 - c. Finally, the Foundation will need to *prioritize* what you feel is critical to realizing the goals of the new strategic plan, as well as engage in significant dialogue to calibrate collective understanding among board and staff about the meaning of "high-quality" with an equity lens in each of the prioritized areas. These are areas that can be strengthened and tracked over time.
- 4. **Messaging, Framing & Communications.** Many participants expressed concern about how the Foundation will effectively message about its focus on equity, demonstrate equity's relevance to the mission and achieving your strategic objectives, and not alienate supporters and partners for whom this may be difficult.
 - a. Much work needs to be done to define specific dimensions of equity focus for the Foundation, and how such foci can have a meaningful impact on a broad social issue on a regional basis. From our findings, how such a focus will be possible was obvious to many of those who experience inequity, but more amorphous to those who do not.
 - b. Work is needed to define how that equity focus will be communicated to develop broad understanding among the community. As noted above, it will be key to show partners and allies in the field how the Foundation can be impactful and successful as a result of this shift in focus and understanding of the problems.
 - c. The key questions here include, *How can the Foundation leverage its clout in a way that prompts other foundations to address equity? Can it be a zeitgeist?*
 - d. Contracting with communications consultants with equity expertise may be valuable in: implementing the strategic plan; messaging around the embedded equity strategy the Foundation will be developing as part of this process; and in addressing external push back.
- 5. **Relationship Between "Race" and "Ethnicity":**
 - a. Board and staff members have different degrees of comfort or discomfort with each of these foci, and they are both significant.
 - b. It will be important to delve into the unique aspects of:
 - i. domestic and international perspectives;
 - ii. indigenous and native born, generational experiences of marginalized communities (such as African Americans);
 - iii. the experiences of newer immigrant communities; and

- iv. the challenges of developing white awareness. (As one participant noted, *“There’s a culture of color-blindness that is dangerous and unhelpful.”*)
- 6. **Affective & Technical Aspects of Equity.** Many staff and some board do not want to engage in the affective dimensions of equity work. Other staff and board want and expect this, even if they are unsure if they will be ready, they know it is necessary. Balancing both these needs in the on-going work will be critical.
- 7. **Operations & Program Staff Differing Relationships to the Work.** There seems to be a significant divide in understanding and connectivity to the Foundation’s mission and equity overall between the operations side of the staff team and the program side, which we have found to be common in many types of organizations. Continuing to develop a culture of trust, candor and dialogue, and providing opportunities for operations staff to experience more aspects of the programmatic work, will be vital in bridging this gap.

Our Recommendations To Date

MAG’s recommendations for the Foundation to date include: (1) supporting modeling and peer mentoring; (2) developing an “intersectional” lens; (3) building equity into existing culture work and strengthening it; (4) focusing on personal learning and growth along-side foundation-supported learning; (5) prioritizing and addressing the areas identified in the survey as needing improvement; and (6) ensuring that the foundation is sufficiently informing itself and engaging authentically in learning and strategy partnership with those in the community and region who have had a long-time, deep focus on equity. *Details on each of these areas follow below:*

- 1. **Modeling & Peer Mentoring.** There are several white board and staff members who have a well-developed or developing equity lens, and have had powerful epiphanies that can potentially support their white peers in the Foundation. We encourage the Foundation to explore the potential roles of whites who have this awareness to lead and model. E.g.:
 - a. *“Being part of an oppressed group can be like death by a thousand cuts, because of negative assumptions about a host of things, and how this corrodes and individuals and community. There is no acknowledgement of how that history lives today and how it manifests itself.”*
 - b. Board members who use language such as “addressing institutional racism and bias” can potentially be a support to others with similar demographic backgrounds for peer mentoring, coaching, support, being a sounding board, etc. particularly when there are many questions, misgivings, or challenges with this work.
- 2. **Developing an “Intersectional” Lens.** Without having the language, we heard participants speaking of the need for what is called in the equity field an

“intersectional” lens – i.e., seeing the interrelationship between multiple forms of structural marginalization, including racial, ethnic, socioeconomic, and other areas. An important key here will be developing an intersectional lens while not diluting the specificity of the circumstances, experiences, needs and conditions of particular racial, ethnic and socioeconomic communities (e.g., African Americans, Latinos, etc.).

3. **Building Equity Into Existing Culture Work & Strengthening It.** The Foundation will need to intentionally ensure that the strong work that has already begun among staff around organizational cultural, is buoyed and supported by this focus on equity and does not undermine it.
4. **Personal Learning and Growth Along-side Foundation-supported Learning.** While the Foundation may incorporate approaches to joint learning and reflection, particularly as it relates to roles in the organization and the achievement of its mission, this will need to be complemented by each individuals’ active engagement in their own on-going learning process around equity. Many board and staff in the Foundation are already engaged in this via reading, peers, trainings, groups, discussion forums, engaging with communities that are different from themselves, and other areas.
5. **Addressing Survey Areas.** The areas rated as needing improvement include Planning, Policies, Capacity Building Approaches, Vendors, Evaluating and Measuring Success, and Financial Management and Analysis. We recommend the Foundation reflect and decide which of these may be priorities for its work in incorporating an equity lens.
6. **“New & Groundbreaking.”** We have a caution around a notion we heard from some that this work may be considered “groundbreaking.” We encourage the Foundation to seek out and partner with those communities, organizations, community members and leaders who have been enacting a systematic focus on racial and ethnic equity for some time, to ally, learn from and with, and message together. Becoming more aware of the terrain and landscape of long-time and current equity efforts will be important for the Foundation to be experienced as an informed, humble, learning-oriented, authentic peer and partner by the field.

Action Learning Possible Trajectories

Finally, a number of “action learning” areas were identified from the survey that will be carried into our Training & Alignment sessions with the board and staff, to prioritize and develop next steps around, and as part of the Strategy Blueprint that will result from this process:

1. Grantmaking

- a. As part of the grantee application process, require a document indicating the racial and ethnic diversity of the applying organization's board and staff.
- b. Group discussion review of "representative" (anonymous) grantees to understand how staff and board will apply and equity lens

2. Board Development

- a. Board development to gain a much fuller appreciation of equity and its implications for the board's responsibilities
- b. Board recruitment processes to locate more diverse candidates

3. Vendors

- a. Define a procedure for reviewing the racial equity approach and impact of our vendors and consultants
- b. Review our vendor hiring policies to implement a racial equity lens, diversifying vendors, and ensuring processes for diverse slots when hiring vendors

4. Staff Hiring

- a. Hiring new, diverse staff members including more openness about racial and ethnic goals for hiring staff

5. Education & Training

- a. Training on diversity, understanding "white privilege," and the experiences and history of marginalized groups
- b. Having discussions about equity as a staff to have a greater understanding of others' ideologies
- c. Combining academic information on how to implement the vision with a racial equity lens with personal opportunities to learn from individuals and organizations about the realities of different marginalized groups

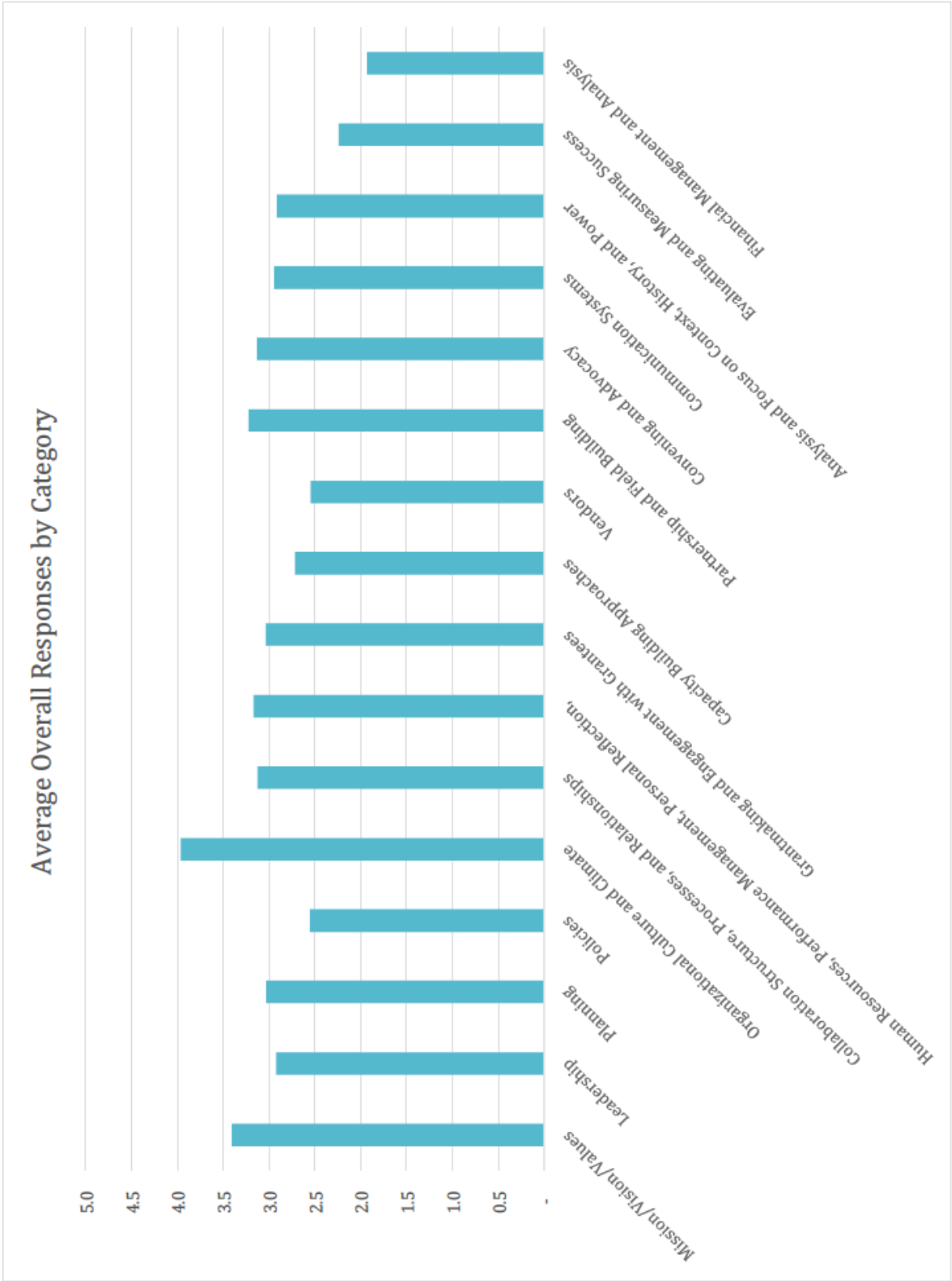
6. Other

- a. Testing a new approach for building leadership capacity and organizational capability in the most underserved communities in the region, esp. Prince George's County [We would add to this, ensuring a built-out understanding of "leadership capacity" and "organizational capability," using an equity lens.]

Conclusions & Next Steps

We offer the above information as a baseline, from which the Foundation can decide what is most important in pursuing the next stages of its work, as it develops its institutional stance in relation to racial and ethnic equity. Those prioritized areas can then be actively developed and tracked over time. We look forward to the next phases of our relationship with the Foundation, which will include *coaching* for key leaders, *training*

and alignment sessions with board and staff, and developing a *strategy blueprint* which can guide the Foundation's work going forward.



Appendix C: Meyer Racial Equity Stance

Racial and Ethnic Equity Vision and Stance

Background

Our current strategic plan is driven by the acknowledgement that the Greater Washington region is confronting a social and economic crisis — one that has our most vulnerable residents facing complex, interrelated challenges. At the root of this crisis is a deep, longstanding economic divide that creates barriers for low-income people to get family-sustaining jobs, find affordable housing, access education, and become financially stable.

While we acknowledged in our 2015 open letter that these barriers are even greater for people of color, we fell short in naming the primary driver of the economic and social divide in our region and country: **structural and systemic racism**.

As the Foundation continues to explore what it means to integrate a racial and ethnic equity lens in all of its programs and internal operations, we aspire to be **bolder** and explicit in our language about **racism**, **inequity**, and **injustice**. We also aspire to be more fluent in the complexity and nuances of **racialized outcomes and disparities** in our region and comprehensive in our response to these challenges. This document represents the Foundation's staff early stage vision, goals, and stance for our racial and ethnic equity work.

Racialized Outcomes in the Greater Washington Region

The racial divide in our region is not new. In the District of Columbia alone, the median income for white households is approximately \$113,000, while the median income for communities of color is substantially lower — \$56,000 for Hispanic and Latino households, and \$39,000 for black and African American households. The gap is similarly wide across the region, with white households earning nearly twice as much as both black and Latino households in Montgomery County and several jurisdictions in Northern Virginia.

Racialized disparities can also be found in educational attainment and employment rates throughout the region:

- In the District, the high school graduation rate is 85% for whites; 59% for blacks; and 65% for Latinos.
- White people are nearly four times more likely to have a bachelor's degree than black people and more than twice as likely as Latinos in the District.
- In Montgomery County, 70% of white individuals have bachelor's degrees, compared to 40% of black and African Americans, and 25% Hispanic and Latinos.

- In the District, the unemployment rate is 3% for white people, 9% for Hispanic and Latinos, and an incredible 20% for black and African Americans.
- In Arlington County, the unemployment rate is 2% for whites and 15% for black and African Americans.
- In Prince George’s County, the unemployment rate for African Americans and Latinos is approximately twice as high as it is for white people.

(The above data is sourced from the CFED Family Assets Count report published in 2015. More detailed socioeconomic data can be found in the Appendix of this document.)

Discriminatory Policies and Practices in the Washington, DC Region

Just as we see in our national history, the Greater Washington region has a history of discriminatory policies and practices—dating back to the Civil War, Reconstruction, and the “Jim Crow” laws of the early 20th century—that have exacerbated and reinforced these racialized disparities.

A small sampling of these policies include real estate steering, redlining, and housing covenants that excluded or prevented racial (and, in some cases, ethnic and religious) minorities from using, leasing and/or owning property in restricted areas. A series of local and national court cases legitimized the reinforcement of such practices, including:

- *Torrey v. Wolfes*, 1925, which set a precedent in DC for the courts to enforce racially restrictive covenants placed in deeds by developers.
- *Corrigan v. Buckley*, 1926, which set the precedent nationally for courts to enforce racially restrictive covenants established by groups of neighbors. Housing covenants in the Mount Pleasant neighborhood show how the spread of petitions after the decision worked to keep the neighborhood white well into the 1950s.

Housing covenants and racial exclusionary practices also flourished in the suburbs around the District. For example, public housing developments, like those developed in those in Greenbelt, Maryland in 1937 for whites-only, were segregated as well.

Similar racially-motivated policies, legislation, and practices in the areas of education, mortgage lending, access to employment, and so on—some remaining in effect as recently as the 1950s and 1960s—combine to contribute to, exacerbate, and reinforce structural and systemic racism, leading to the racialized disparities we see in our region today. Our country and region are living with the legacies of these policies, and we believe that the connection between this history and our current context is not incidental but structural and causal.

Racial and Ethnic Equity Stance

Before we strategize on how to incorporate a racial and ethnic equity lens in all of our operations and programs, our first task is to articulate the Foundation’s vision, values, and stance on equity. Having a strong understanding of and internal alignment around our foundational beliefs and assumptions about systemic racism and racial justice is imperative as we move into the next phases of developing our racial equity strategy. We also note that while these values and assumptions were developed in the context of our conversations about racial equity, we believe they transcend those conversations, and in fact represent the Meyer Foundation’s overarching values and beliefs—they are a part of who we are.

Vision

We envision a just, connected, and inclusive Greater Washington community, in which systemic racism and its consequences no longer exist.

Goals

- We seek to dismantle persistent, racialized social and economic disparities in our region.
- We will build an organizational culture that allows us to challenge our own assumptions and biases as well as each other’s to continuously improve our policies and practices as we work to advance racial equity.

Values (and how we enact them)

- We honor and are inspired by the human dignity of all people.
- We are committed to ensuring that individuals and families are connected to community, and to building bridges that nurture those connections within communities.
- We are committed to listening to communities, to engaging in authentic dialogue, to following their lead, and to applying what we learn to all facets of our work.
- We commit to bring to our work compassion, respect, integrity, humility, accountability, and responsiveness.
- We view conflict, which is inevitable in this work, as an opportunity for growth.

Underlying Assumptions

- We believe the connection between poverty and racial equity is not incidental but structural and causal.

- We understand equity to mean just and fair inclusion into a society in which all can participate, prosper, and reach their full potential
- We believe that the challenges our region faces are interconnected and the result of systemic and structural racism.
- We believe that all communities have assets on which they can draw as they face challenges and opportunities.
- Communities themselves have the knowledge, wisdom, and ideas to shape their futures.
- We believe that diverse experiences and perspectives are essential to our work.
- We believe that unchecked biases and assumptions combine to create inequitable policies and practices.

Questions for Further Discussion

- Several questions emerged during our initial conversations about our racial and ethnic equity stance that will need further exploration as we finalize our stance. These questions include:
- What are the political constraints, history, and current contexts that we need to more deeply understand to grasp the lives that people and communities are living?
- What are we “building” as we are “dismantling” barriers caused by systemic racism?
- What do we believe is the relationship between individual responsibility and systemic equity?
- How do we envision and understand “connectedness?”

Philosophical Questions to Explore

Over the summer, additional philosophical and “ways of being” questions surfaced that the Foundation board and staff will need to grapple with as we delve deeper into this work

- How do we acknowledge the power and privilege inherent in philanthropy and our institution? How do we leverage this position and influence our “elite” network in pursuit of equity in our region?
- How do we acknowledge Meyer’s specific history as a grantmaker and influential institution in the community? We need to be sure we understand how the Foundation’s past work with reinforced or exacerbated systemic racism and racialized outcomes.
- How do we own this history so we can be full, authentic partners with others who have been working towards racial justice for decades?

- How do we move forward with this important work while we are still learning? How can we act urgently and acknowledge and make room for the fact that we may make mistakes? What changes in our organizational culture can we implement in order to give ourselves space to learn, grow, and improve?
- How do we continue to “braid” the racial and ethnic equity vision and goals of our Operations and Program teams to make our organization stronger and more connected?
- How do we push and keep ourselves accountable in addressing a complex and long-entrenched challenge, such as systemic racism, when immediate outcomes and progress may not be visible or easily measured?
- Will working towards community connectedness and pursuing racial justice change the way we define and understand impact? How?
- How do we ensure that we aren’t prescriptive in how we define “thriving?”

Further Learning and Opportunities for Growth

In the words of many practitioners in the field of racial justice, one never graduates from the “racial equity academy.” Over the next several months, we will work to identify and take advantage opportunities to further our individual and organizational learning. Some opportunities could include providing training and coaching on how to have difficult conversations, and utilizing the Intercultural Development Index (IDI) tool to assess our individual and organizational areas for growth in cultural competence.

Appendix D: Racial History Gallery Walk

This is what
Took my
family to PA

1916-1930

This took
my family
to Massachusetts

~~escaping~~
escaping
seeds of
racism soon



Such an important
part of US history
and it's not taught
in most high school
history courses.

1916- 1930 The Great Migration was the movement of 1.3 million African-Americans out of the Southern United States to the North, Midwest and West from 1915 to 1930. African Americans migrate to escape racism, seek employment opportunities in industrial cities, and to get better education for their children, all of which were widely perceived as leading to a better life.

My grandma & her
family relocated from
Arkansas to Indiana, Illinois,
Ohio

what are the
Impacts of
to day's
Remigration of
suburban elites &
middleclass Back into
the City

1954



1954 Brown vs. Board of Education of Topeka orders it unconstitutional to enforce or allow segregation in public schools. This Supreme Court Ruling Overturned the Plessy vs Ferguson Trial in 1896 that upheld the segregation of black and white schools to be legal.

Never explained
or sold as
beneficial to
whites

meeting
Ruby Bridges
who integrated
school was
a huge honor

Basis for court-ordered
desegregation of Buffalo
public schools - ~~1954~~
~~first~~ was bussed to
first integrated school
established by court
order.

The best of
times, the worst
of times.

US schools have
again resegregated
along racial lines.

1955-1968

Struggle w/ family who believe because they grew up in civil rights movement times that race doesn't is it still a learning, painful time

Defined my life


Childhood Bus trip as an ~~10~~^{child} old to the 20th Anniversary of the March on Washington

1955-1968 Civil Rights Movement Occurred. Many lives were lost including two notable leaders, Malcolm X and Martin Luther King Jr.

Buffalo NY riots of 1967 rocked our world. My dad walked the streets with other clergymen + clergymen.

Formative years learning through my parents
Feeling this as we moved to different regions of country

My parents were born, still remember much of this



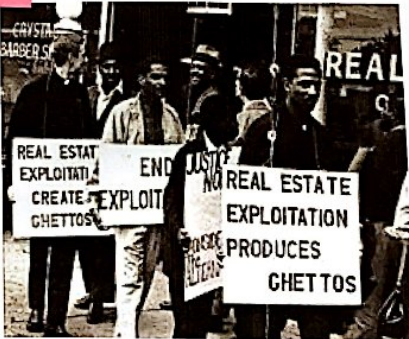
1960

This has happened to me: my family

Still a Powerful Force

CRA → LITTE Developments

Wonder why or cities are segregated?



Still happening

Still exists

1960 The term "redlining" was coined. A practice to economically disenfranchise people of color by denying them home and business loans, redirecting their voting power, and ultimately affecting transportation and food access to limit where people of color or low income people can work, live, and be educated. Redlining has been a practice ever since the Jim Crow Era of the 1930's.

red lining in my neighborhood was based on square feet in the home

again control to how we neighborhoods have been formed

2014-2016

Total lack
of compassion
or morality to allow
this

So sad to
know that
people in
leadership knew
"Lead poisoning
remember?"



So frustrating
& upsetting that
lawmakers are
still dismissing
this.

2014-2016 Flint Water Crisis- In one of the lowest income areas in the nation, it was discovered in 2014 that water conditions for those who lived in the area were deplorable and that illness was becoming common among the population due to heavy lead contamination. In 2016 more media attention was brought to the fore and the city was placed on state of emergency status. Many government officials knew the toxicity and danger of the water source and took no action to notify citizens or prevent the spread of health issues.

systemic
racism
personified

'we' joked at Moscow
Olympics + lack of
clean/soft water
but dismiss it
in our own
country?

Appendix E: Demographic Data on the Washington, DC Region



Building Financial Security in the District of Columbia: A Data Snapshot



District of Columbia Households

Income poverty is a way of life for 15% of households in the District of Columbia—a rate twice that of the number of households living in income poverty throughout the D.C. metropolitan region.¹ But far more households (41%) are financially vulnerable. Communities of color fare even worse. 61% of African American households and 57% of Hispanic households are liquid asset poor.

Although many residents in the District earn above poverty wages, these “liquid asset poor” households do not have enough savings to live above the poverty level for just three months if they lose a job, face a medical crisis or suffer another income disruption. This means that one out of every two households in the District live in a state of persistent financial insecurity, one emergency away from falling into debt or even losing a home. *The inability to bounce back from financial pitfalls not only hurts local individuals and families, it stifles the long-term economic growth of the District of Columbia.*

These findings are part of a new data analysis from Family Assets Count, a project of CFED (the Corporation for Enterprise Development) and the Assets & Opportunity Initiative, in partnership with Citi Community Development, Capital Area Asset Builders (CAAB), and United Way of the National Capital Area. The analysis spotlights a range of challenges confronting the District's vulnerable families:

- 74% of single-parent households, 55% of households with children, 54% of renters and 73% of households with no education above a high school diploma live in liquid asset poverty in the District.
- 18% of the District's population receives the federal Earned Income Tax Credit (EITC), but only 4% are utilizing free tax prep services to receive their refund.
- 12% of District households do not have a checking or savings account—nearly twice the national rate. So, nearly 32,000 households are more susceptible to using alternative, often predatory, financial services. Even among those households that have bank accounts, a full 25% still relied on alternative financial services, such as check cashing or payday loans in the last year.

Families across the District are struggling to stay above water. CAAB and their partners at the United Way of the National Capital Area are promoting policy solutions in the District including:

- Maximizing and expanding the coverage of the Earned Income Tax Credit (EITC)
- Increasing matched savings programs for youth and adults to encourage savings dedicated to pursuing postsecondary education, establishing a small business or purchasing a home
- Increasing integration of financial capability and asset-building components into public and non-profit services available to low- and moderate-income residents

Through cutting-edge data, tools and resources, Family Assets Count leverages the power of cities to improve financial stability for families and advances programs and policies that reduce barriers and encourage families to save and build assets. For more information and data, visit FamilyAssetsCount.org.

¹DC Metropolitan Region refers to Washington-Alexandria-Arlington MSA.

LIQUID ASSET POVERTY

41%

Don't have enough savings to live above the poverty line for three months

ASSET POVERTY

31%

Don't have enough net worth to live above the poverty line for three months

UNBANKED

12%

Don't have a checking or savings account

UNDERBANKED

25%

Have a bank account but still use check-cashing or payday loans



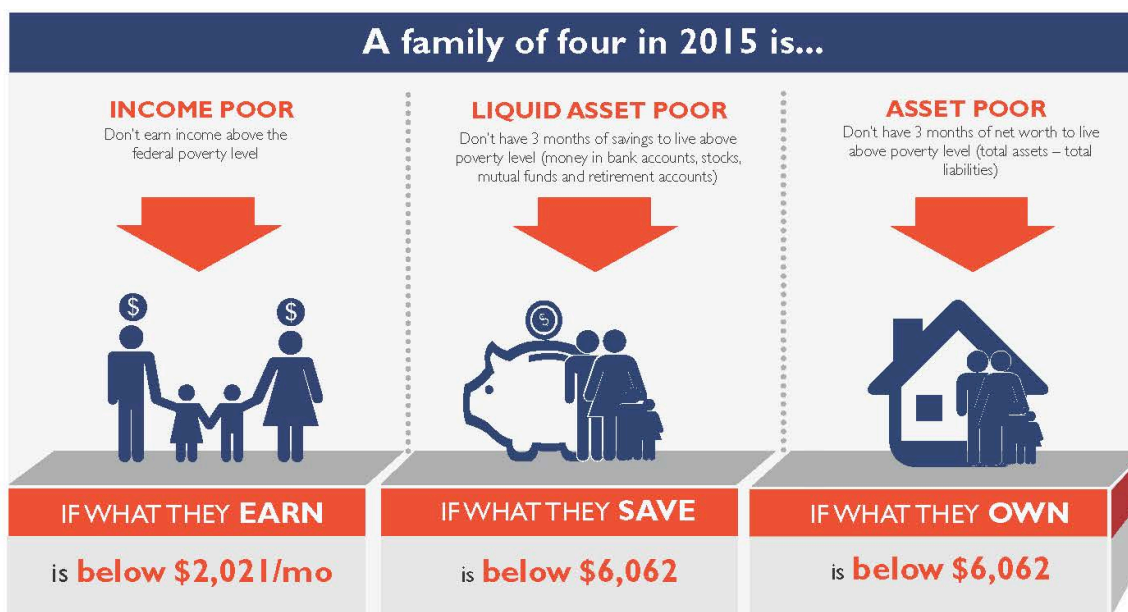
Asset Poverty & Liquid Asset Poverty: CFED, 2014 *Assets & Opportunity Scorecard*; U.S. Census Bureau, Survey of Income and Program Participation (SIPP, used for US and all states excluding AK, DC, SD, WY); FDIC, *Unbanked and Underbanked: 2013 FDIC National Survey of Unbanked and Underbanked Households* (used for US, all 50 states, the District of Columbia and the 71 largest Metropolitan Statistical Areas). Estimates for more localized geographies are derived from CFED's statistical modeling process using the FDIC or SIPP and 2008-2012 American Community Survey data. The figures are geographic estimates and are not meant to directly reflect the FDIC or SIPP data.

Building Financial Security in the District of Columbia: A Data Profile



MEASURING FINANCIAL INSTABILITY

The concept of asset poverty serves to broaden our definition of financial instability to include not only what a family earns, but also what it saves and owns. Rates of liquid asset and asset poverty are typically far higher than income poverty, demonstrating the pervasiveness of the issue.



OPPORTUNITIES TO BUILD ASSETS FOR DISTRICT OF COLUMBIA RESIDENTS

Capital Area Asset Builders and United Way of the National Capital Area see three key opportunities to help residents of the District of Columbia build assets.

Maximize and Expand Coverage of the Earned Income Tax Credit (EITC)

The Earned Income Tax Credit (EITC) is considered the country's most effective anti-poverty tool. In 2014, over 54,000 DC working, low-income residents claimed the EITC and received over \$125 million in tax credits. Additionally, the District of Columbia has the most robust local EITC in the nation (40% of the federal EITC). In 2014, the local DC EITC provided an additional \$52 million in tax credits to working, low-income residents. However, thousands of eligible DC residents do not claim it each year. This leaves many millions of dollars out of low- and moderate-income DC communities.

Increase Matched Savings Programs for Youth and Adults

Savings cushions can greatly reduce stress and increase hope and financial security for low- and moderate-income families in the District. However, too few District residents participate in matched savings programs that assist them build financial cushions. This fact underscores the need to increase funding for public and private programs to encourage low- and moderate-income residents to save, enabling them to break the cycle of poverty and build wealth.

Increase Integration of Financial Capability and Asset-Building into Public and Nonprofit Services Available to Low- and Moderate-Income Residents

Several DC programs integrate financial capability into delivery of existing public services that assist low- and moderate-income residents of the District increase savings, reduce debt, improve credit and access banking products. We need to expand these pilots and create locations where residents can access bundled financial capability aligned with public services to assist DC families to build wealth for a better future. Furthermore, because many small businesses are critical to job creation, we should build new public-private partnerships to increase financial capability services for owners of small and microbusinesses.

WHO IS LIQUID ASSET POOR IN DISTRICT OF COLUMBIA?

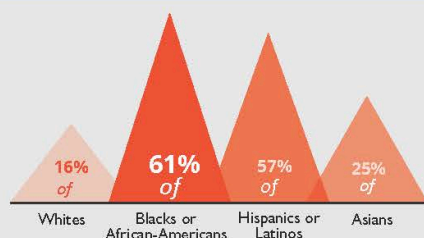
Liquid asset poverty means there is no "slack" in a family's budget. If a liquid asset poor family faces an unforeseen expense, such as a car repair or a medical bill, they may have to borrow to cover the tab. Liquid asset poverty also means deferring future financial security—whether that is saving for retirement or investing in a home or college education.

Two out of five households in the District are liquid asset poor, and those most likely to be affected are households of color, low-income households, single parents and those with less than a college degree. However, this financially vulnerable group often confounds the stereotypes. For example, a quarter of homeowners are liquid asset poor. Two out of five households earning between \$50,000-\$75,000 annually have less than three months of savings.

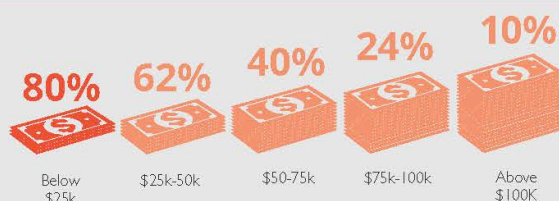
HOUSEHOLDS IN LIQUID ASSET POVERTY ...



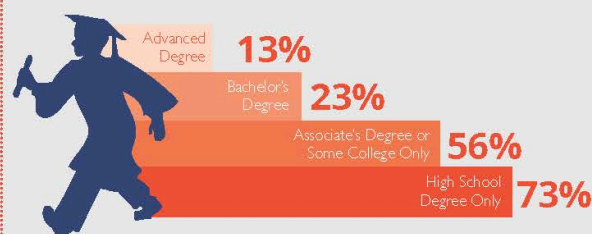
BY RACE & ETHNICITY



BY HOUSEHOLD INCOME



BY EDUCATION



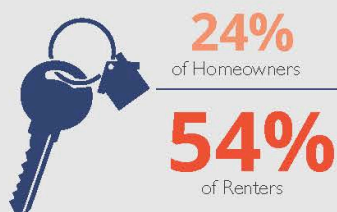
BY POVERTY STATUS

35% Households above the poverty line

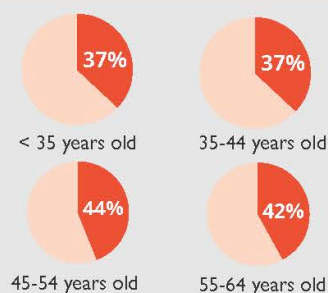
2011 POVERTY LINE (family of 4): **\$23,850**

80% Households below the poverty line

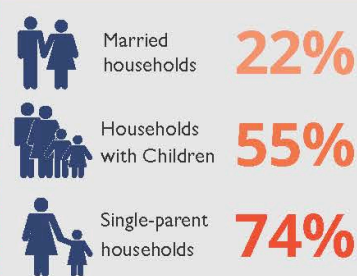
BY HOUSING



BY AGE OF HOUSEHOLDER



BY FAMILY STATUS



Note: Liquid asset poverty estimates at the city level are derived from CFED's statistical modeling process using the Census Bureau's Survey of Income and Program Participation and the 2008-2012 American Community Survey data. Caution should be used in interpreting the local estimates as the statistical model is based on national surveys of fewer than 50,000 households.

Building Financial Security in the District of Columbia: A Data Profile



POPULATION AND DEMOGRAPHICS

Measure	District of Columbia	Alexandria, VA	Arlington County, VA	Fairfax County, VA	Montgomery County, MD	Prince George's County, MD	Washington Metro*	United States
Total Population	633,167	146,690	220,785	1,117,918	1,004,242	881,876	5,861,318	313,861,723
White	224,395	77,085	140,297	595,474	477,764	128,319	2,806,794	197,212,409
Black or African American	308,062	31,029	18,454	100,972	169,598	556,281	1,462,849	38,418,235
American Indian and Alaska Native	1,422	229	681	1,715	1,781	2,337	13,538	2,081,188
Asian	22,257	9,170	21,245	199,343	142,505	36,736	550,648	15,416,646
Hispanic or Latino	62,648	24,445	33,986	178,749	179,879	138,765	845,050	52,952,497
Total Households	268,015	65,294	95,138	390,705	361,632	303,563	2,106,241	115,731,304
White	109,043	39,444	66,583	241,688	201,247	51,377	1,138,850	80,761,578
Black or African American	123,726	13,279	8,104	35,843	60,518	206,800	543,552	13,977,892
American Indian and Alaska Native	1,003	-	434	1,085	1,004	867	6,758	815,177
Asian	9,476	3,647	8,042	60,166	47,145	10,261	171,963	4,839,422
Hispanic or Latino	21,423	7,242	10,483	44,924	46,033	31,398	214,021	13,945,351
Population with Disability	11.2%	6.2%	5.3%	6.5%	7.7%	8.4%	8.0%	12.3%
U.S. Citizenship Rate	91.4%	82.6%	87.0%	85.7%	84.0%	87.3%	88.5%	92.9%
Speak English Less Than "Very Well"	5.1%	12.0%	7.6%	14.4%	14.7%	9.4%	10.0%	8.6%

HOUSEHOLD FINANCES

Measure	District of Columbia	Alexandria, VA	Arlington County, VA	Fairfax County, VA	Montgomery County, MD	Prince George's County, MD	Washington Metro*	United States
Asset Poverty	31.0%	23.4%	18.3%	14.0%	16.2%	25.7%	19.3%	25.4%
Liquid Asset Poverty	40.9%	29.3%	22.9%	23.4%	27.7%	42.8%	30.7%	43.5%
Households with Zero Net Worth	23.2%	17.9%	15.3%	11.1%	12.7%	19.6%	-	17.0%
Median Household Income	\$66,950	\$85,762	\$102,893	\$109,421	\$97,181	\$72,098	\$89,605	\$52,176
White	\$113,910	\$109,333	\$118,584	\$126,263	\$118,518	\$79,852	\$108,160	\$57,431
Black or African American	\$39,081	\$53,095	\$60,049	\$78,713	\$66,858	\$72,897	\$64,593	\$34,560
American Indian and Alaska Native	\$50,673	-	\$24,345	\$51,359	\$62,550	\$64,367	\$62,810	\$36,252
Asian	\$78,882	\$90,596	\$100,029	\$103,570	\$101,311	\$80,322	\$100,883	\$71,580
Hispanic or Latino	\$55,822	\$59,333	\$63,011	\$70,679	\$65,333	\$59,353	\$64,748	\$41,107
Income Poverty Rate	15.3%	5.8%	6.0%	4.2%	4.5%	7.1%	5.9%	11.7%
White	1.5%	1.6%	2.6%	1.7%	1.9%	2.9%	2.5%	7.3%
Black or African American	23.9%	12.4%	14.7%	7.5%	8.5%	6.8%	10.5%	23.9%
American Indian and Alaska Native	-	-	-	-	-	7.6%	12.3%	24.3%
Asian	6.0%	9.1%	5.6%	5.2%	4.4%	6.7%	5.0%	9.6%
Hispanic or Latino	15.2%	11.3%	15.4%	11.0%	9.9%	13.4%	11.5%	22.8%
Unbanked Households	11.8%	5.5%	3.9%	3.0%	4.3%	8.0%	4.3%	7.7%
Underbanked Households	24.8%	18.8%	15.8%	9.2%	17.7%	25.8%	19.8%	20.0%
Consumers with Subprime Credit	54.2%	-	-	-	-	-	50.4%	55.6%
Average Credit Card Debt	\$11,129	-	-	-	-	-	\$12,612	\$9,890
Borrowers 90+ Days Overdue	4.0%	-	-	-	-	-	3.0%	3.4%

* The Washington-Arlington-Alexandria, DC-VA-MD-WV Metropolitan Statistical Area consists of the District of Columbia; Calvert, Charles, Frederick, Montgomery, and Prince George's County in Maryland; Arlington, Clarke, Culpeper, Fairfax, Fauquier, Loudoun, Prince William, Rappahannock, Spotsylvania, Stafford, and Warren Counties in Virginia; the independent cities of Alexandria, Fairfax, Falls Church, Manassas, Manassas Park, and Fredericksburg, Virginia; and Jefferson County, West Virginia.

"-" indicates that no data is available



Building Financial Security in the District of Columbia: A Data Profile

USE OF SERVICES

Measure	District of Columbia	Alexandria, VA	Arlington County, VA	Fairfax County, VA	Montgomery County, MD	Prince George's County, MD	Washington Metro*	United States
Households Receiving SNAP	15.2%	5.1%	3.9%	4.2%	5.8%	10.3%	7.5%	13.4%
Households Receiving Public Assistance	3.9%	1.3%	0.8%	1.0%	1.9%	1.9%	1.9%	2.9%
Households Receiving SSI	6.0%	1.9%	2.0%	1.9%	2.4%	3.9%	3.1%	5.3%
Total Tax Filers Receiving EITC	17.9%	11.3%	6.6%	10.2%	12.2%	18.0%	13.1%	19.9%
Average EITC Received	\$2,255	\$2,072	\$1,849	\$2,119	\$2,143	\$2,260	\$2,188	\$2,359
EITC Returns Prepared By Volunteer	3.7%	3.1%	5.9%	4.0%	2.2%	0.9%	2.5%	2.6%
EITC Returns Prepared by Paid Preparer	54.5%	61.4%	56.7%	61.0%	61.7%	57.9%	56.1%	57.1%
EITC Refunds Received through Direct Deposit	83.6%	70.1%	66.7%	70.3%	70.0%	81.7%	77.8%	82.8%

EMPLOYMENT AND BUSINESS OWNERSHIP

Measure	District of Columbia	Alexandria, VA	Arlington County, VA	Fairfax County, VA	Montgomery County, MD	Prince George's County, MD	Washington Metro*	United States
Labor Force Participation Rate	68.2%	78.4%	78.3%	72.7%	72.0%	72.4%	72.1%	63.7%
White	78.4%	78.4%	80.0%	70.5%	69.3%	61.9%	71.1%	63.1%
Black or African American	57.7%	77.4%	70.6%	78.6%	74.6%	73.7%	70.8%	61.9%
American Indian and Alaska Native	70.2%	-	-	-	-	-	69.9%	58.5%
Asian	74.4%	75.5%	74.6%	71.9%	69.8%	65.9%	71.3%	65.2%
Hispanic or Latino	77.2%	80.4%	78.4%	79.1%	79.6%	81.2%	79.1%	67.3%
Unemployment Rate	10.4%	4.5%	3.5%	5.1%	6.2%	9.2%	6.7%	8.4%
White	3.2%	2.7%	2.4%	4.5%	4.5%	5.0%	4.5%	6.8%
Black or African American	20.0%	11.4%	15.2%	6.0%	10.4%	10.9%	11.6%	15.2%
American Indian and Alaska Native	-	-	-	-	-	-	8.1%	14.8%
Asian	2.2%	-	-	5.1%	3.7%	9.2%	4.8%	6.5%
Hispanic or Latino	9.1%	-	3.3%	6.5%	8.2%	5.2%	6.8%	10.0%
Average Annual Pay	\$83,054	\$69,462	\$80,704	\$78,108	\$66,172	\$51,592	\$68,169	\$49,808
Microenterprise Ownership Rate	16.8%	17.0%	14.8%	17.9%	21.6%	15.4%	17.2%	17.3%
Self-Employed Workers	7.0%	6.7%	6.9%	9.5%	10.8%	5.6%	8.2%	9.7%
Vehicle Non-Availability by Working Household	32.2%	6.4%	10.0%	2.6%	4.8%	7.2%	7.2%	5.2%

HOUSING AND HOMEOWNERSHIP

Measure	District of Columbia	Alexandria, VA	Arlington County, VA	Fairfax County, VA	Montgomery County, MD	Prince George's County, MD	Washington Metro*	United States
Homeownership Rate	41.1%	43.0%	44.3%	67.2%	66.4%	61.8%	63.1%	64.0%
White	48.9%	55.7%	50.2%	74.9%	75.3%	77.0%	72.1%	71.5%
Black or African American	37.0%	19.2%	23.6%	44.5%	43.1%	60.0%	50.2%	42.7%
American Indian and Alaska Native	29.2%	28.8%	34.1%	51.2%	49.4%	64.1%	52.5%	53.9%
Asian	36.2%	36.0%	34.8%	67.0%	73.1%	64.7%	67.0%	57.5%
Hispanic or Latino	30.1%	22.6%	29.9%	44.4%	52.3%	47.1%	45.8%	45.8%
Cost Burdened Renters	44.7%	48.7%	51.4%	52.8%	39.5%	45.6%	49.0%	52.3%
Cost Burdened Owners	24.9%	31.7%	32.1%	42.5%	25.1%	27.6%	32.2%	34.2%
Affordability of Homes	6.7	5.6	5.7	4.4	4.6	3.5	4.1	3.3
Seriously Delinquent Mortgages	3.6	-	-	-	-	-	-	2.6%

"-" indicates that no data is available

Building Financial Security in the District of Columbia: A Data Profile



EDUCATIONAL ATTAINMENT

Measure	District of Columbia	Alexandria, VA	Arlington County, VA	Fairfax County, VA	Montgomery County, MD	Prince George's County, MD	Washington Metro*	United States
Less than High School	11.4%	9.3%	6.6%	8.1%	8.6%	14.7%	9.8%	13.7%
High School Degree	88.6%	90.7%	93.4%	91.9%	91.4%	85.3%	90.2%	86.3%
White	99.6%	98.1%	98.8%	97.9%	97.6%	92.3%	96.2%	91.4%
Black or African American	82.7%	85.5%	85.8%	92.1%	92.1%	92.2%	89.6%	83.1%
American Indian and Alaska Native	94.1%	-	88.1%	83.9%	79.2%	72.9%	83.6%	79.1%
Asian	90.1%	94.9%	93.1%	90.6%	91.5%	83.6%	90.5%	85.7%
Hispanic or Latino	70.0%	65.7%	71.3%	68.7%	69.6%	43.3%	66.1%	64.0%
Associate's Degree or Some College	16.9%	17.8%	12.2%	19.6%	19.9%	28.7%	23.0%	29.1%
Bachelor's Degree	53.5%	61.7%	72.1%	59.1%	56.9%	30.2%	48.1%	29.1%
White	90.1%	77.4%	82.8%	68.7%	69.2%	43.0%	59.4%	32.5%
Black or African American	23.5%	35.7%	45.1%	43.9%	39.8%	29.8%	31.0%	18.8%
American Indian and Alaska Native	35.6%	-	23.2%	36.6%	28.2%	14.5%	26.3%	13.5%
Asian	75.2%	71.1%	71.9%	60.9%	65.8%	50.1%	62.2%	50.7%
Hispanic or Latino	40.1%	30.7%	36.3%	27.5%	25.5%	8.9%	23.6%	13.7%
Graduate or Professional Degree	30.5%	30.6%	37.8%	28.2%	30.6%	12.6%	23.0%	10.9%

ASSET POVERTY

Measure	District of Columbia	Alexandria, VA	Arlington County, VA	Fairfax County, VA	Montgomery County, MD	Prince George's County, MD	Washington Metro*	United States
Asset Poverty	31.0%	23.4%	18.3%	14.0%	16.2%	25.7%	19.3%	25.4%
Renter	48.9%	37.7%	30.2%	36.3%	40.7%	55.0%		
Homeowner	6.4%	4.8%	4.3%	4.2%	4.6%	8.5%		
White	14.1%	12.7%	12.2%	8.5%	9.0%	12.1%		
Black or African American	44.3%	45.9%	40.1%	32.2%	34.1%	28.0%		
American Indian and Alaska Native	32.6%	-	-	23.0%	23.8%	25.3%		
Asian	19.5%	19.0%	18.4%	10.9%	9.9%	13.9%		
Hispanic or Latino	41.9%	42.7%	40.4%	32.9%	30.9%	38.5%		
High School Diploma	52.0%	44.4%	38.4%	26.7%	28.5%	32.7%		
Some College	38.8%	33.4%	25.9%	19.9%	22.9%	26.5%		
Bachelor's Degree	19.1%	17.3%	15.2%	9.3%	11.2%	15.9%		
Advanced Degree	12.3%	11.0%	10.3%	5.9%	7.4%	11.1%		
Age < 35	35.8%	31.9%	23.7%	27.1%	31.5%	44.5%		
35 <= Age <= 44	31.1%	24.8%	18.0%	16.6%	19.8%	30.2%		
45 <= Age <= 54	32.5%	19.8%	16.4%	11.1%	13.5%	22.2%		
55 <= Age <= 64	27.1%	14.9%	9.6%	6.5%	8.7%	15.8%		
Married	13.5%	15.3%	10.6%	9.0%	9.1%	14.6%		
w/Kids	40.8%	32.3%	19.2%	16.4%	18.9%	30.1%		
Single Parent	58.1%	49.8%	38.4%	33.1%	38.2%	41.8%		
HH Income < \$25k	63.0%	57.3%	52.4%	42.0%	45.1%	52.0%		
\$25k <= HH Income < \$50k	43.0%	41.4%	38.2%	31.6%	31.6%	39.7%		
\$50k <= HH Income < \$75k	30.5%	31.1%	25.8%	22.7%	23.1%	29.8%		
\$75k <= HH Income < \$100k	19.3%	19.6%	17.2%	14.8%	13.9%	19.2%		
HH Income > \$100k	7.2%	6.8%	5.9%	4.6%	4.7%	9.2%		
In Poverty	66.4%	59.4%	54.7%	47.7%	49.4%	56.6%		
Above Poverty Line	25.2%	21.4%	16.4%	12.6%	14.4%	23.6%		

"-" indicates that no data is available



Building Financial Security in the District of Columbia: A Data Profile

LIQUID ASSET POVERTY

Measure	District of Columbia	Alexandria, VA	Arlington County, VA	Fairfax County, VA	Montgomery County, MD	Prince George's County, MD	Washington Metro*	United States
Liquid Asset Poverty	40.9%	29.3%	22.9%	23.4%	27.7%	42.8%	30.7%	43.5%
Renter	53.5%	41.2%	31.7%	41.4%	46.2%	63.0%		
Homeowner	23.6%	13.6%	12.6%	15.4%	18.9%	31.0%		
White	15.7%	15.6%	14.1%	14.1%	15.9%	23.3%		
Black or African American	61.0%	55.1%	49.9%	44.2%	48.8%	45.1%		
American Indian and Alaska Native	38.6%	-	-	34.7%	33.3%	40.6%		
Asian	24.6%	28.7%	25.3%	24.6%	22.5%	31.2%		
Hispanic or Latino	57.0%	58.0%	57.8%	55.6%	58.7%	67.5%		
High School Diploma	73.2%	62.8%	59.4%	50.5%	53.9%	32.7%		
Some College	55.6%	43.8%	38.4%	33.4%	39.4%	26.5%		
Bachelor's Degree	23.2%	19.9%	17.1%	14.3%	17.4%	15.9%		
Advanced Degree	12.8%	10.5%	9.8%	8.7%	11.0%	11.1%		
Age < 35	37.2%	33.0%	22.6%	31.3%	36.9%	54.3%		
35 <= Age <= 44	36.8%	27.8%	20.6%	24.4%	29.0%	44.7%		
45 <= Age <= 54	43.7%	26.8%	23.7%	21.1%	25.2%	38.8%		
55 <= Age <= 64	42.2%	25.0%	18.7%	17.4%	21.5%	36.3%		
Married	22.0%	20.7%	15.3%	17.0%	18.5%	30.2%		
w/Kids	54.5%	41.3%	27.0%	27.4%	31.9%	49.5%		
Single Parent	74.3%	61.7%	51.7%	51.2%	58.6%	63.5%		
HH Income < \$25k	80.4%	74.5%	72.1%	68.1%	71.1%	52.0%		
\$25k <= HH Income < \$50k	61.5%	56.9%	52.3%	54.3%	54.9%	39.7%		
\$50k <= HH Income < \$75k	40.4%	36.7%	29.7%	36.6%	38.2%	29.8%		
\$75k <= HH Income < \$100k	23.5%	22.0%	17.9%	22.4%	22.7%	19.2%		
HH Income > \$100k	9.8%	7.9%	7.2%	8.6%	9.6%	9.2%		
In Poverty	80.1%	72.8%	70.6%	69.5%	71.4%	56.6%		
Above Poverty Line	34.5%	26.8%	20.4%	21.4%	25.2%	23.6%		

Building Financial Security in the District of Columbia: A Data Profile



A FINANCIAL ASSET BUILDING AGENDA FOR THE DISTRICT OF COLUMBIA'S MOST VULNERABLE RESIDENTS

Creating pathways to the middle class for DC residents requires increasing income and building the capacity to manage that income effectively.

CapitalArea Asset Builders and United Way of the National Capital Area are committed to supporting DC residents as they work to increase their financial assets and economic resilience through financial capability and asset-building services.

United Way of the National Capital Area and Capital Area Asset Builders have identified three key sets of policies and best practices to advance this goal.

Maximize and Expand Coverage of the Earned Income Tax Credit (EITC)

- Maintain the DC EITC and its refundable status
- Continue DC's tradition of having the strongest local EITC program in the country by expanding EITC eligibility to assist additional working, low-income families
- Increase awareness of the EITC among the most financially vulnerable DC residents through the expansion of the DC EITC Campaign and in partnership with public, private, faith-based, community-based and other partners
- Promote EITC and free tax preparation services among immigrant communities in their primary language, primarily in Spanish, Amharic and Chinese
- Expand offering of free tax-preparation services for DC's most financially vulnerable residents

Increase Matched Savings Programs for Youth and Adults

- Encourage savings dedicated to pursuing postsecondary education, establishing a small business or purchasing a home for the first time, all of which can lead to low- and moderate-income DC families building wealth for a better future
- Allocate funding for DC matched savings created under the D.C. Opportunities Act of 2000 (D.C. Code § 1-307.61 through § 1-307.74)
- Explore opportunities to scale up other matched savings programs, based on previous experience with pilot programs for foster youth and the homeless

Increase Integration of Financial Capability and Asset-Building into Public and Nonprofit Services Available to Low- and Moderate-Income Residents

- Evaluate the impact of Department of Employment Services' pilot program integrating the delivery of financial capability services with workforce services for veterans, returning citizens, seniors and youth on both workforce program outcomes and financial capability outcomes (increased savings, reduced debt, improved credit scores and access to banking)
- Expand funding and delivery of integrated financial capability services over the long term through key social services, including workforce development programs and those serving foster youth and the homeless
- Research models of financial empowerment centers in other major cities and adopt the most appropriate model for implementation in the District of Columbia
- Incentivize partnerships between technical assistance providers, community lenders and service providers to ensure delivery of financial capability services to entrepreneurs

DATA MEASURES & SOURCES

	Data Measure	Measure Description	Source
Population Demographics	Total Households	Total number of households	U.S. Census Bureau, 2011–2013 American Community Survey
	Total Population	Total population	U.S. Census Bureau, 2011–2013 American Community Survey
	Population with Disability	Percentage of population living with a disability	U.S. Census Bureau, 2011–2013 American Community Survey
	U.S. Citizenship Rate	Percentage of population that are U.S. citizens	U.S. Census Bureau, 2011–2013 American Community Survey
	Speak English Less Than "Very Well"	Percentage of population that speaks English less than "very well"	U.S. Census Bureau, 2011–2013 American Community Survey
Household Finances	Asset Poverty	Percentage of households without sufficient net worth to subsist at the poverty level for three months in the absence of income	CFED, 2014 <i>Assets & Opportunity Scorecard</i> , Census Bureau, Survey of Income and Program Participation (SIPP), 2008 Panel, Wave 10, for US and States (excluding AK, DC, SD, WY). Local Estimates: Estimates at smaller geographies are derived from CFED's statistical modeling process using the SIPP and 2008–2012 American Community Survey data. The figures are geographic estimates and are not meant to directly reflect the SIPP data.
	Liquid Asset Poverty	Percentage of households without sufficient liquid assets to subsist at the poverty level for three months in the absence of income	CFED, 2014 <i>Assets & Opportunity Scorecard</i> , Census Bureau, Survey of Income and Program Participation (SIPP), 2008 Panel, Wave 10, for US and States (excluding AK, DC, SD, WY). Local Estimates: Estimates at smaller geographies are derived from CFED's statistical modeling process using the SIPP and 2008–2012 American Community Survey data. The figures are geographic estimates and are not meant to directly reflect the SIPP data.
	Households with Zero Net Worth	Percentage of households that have zero or negative net worth	CFED, 2014 <i>Assets & Opportunity Scorecard</i> , Census Bureau, Survey of Income and Program Participation (SIPP), 2008 Panel, Wave 10, for US and States (excluding AK, DC, SD, WY). Local Estimates: Estimates at smaller geographies are derived from CFED's statistical modeling process using the SIPP and 2008–2012 American Community Survey data. The figures are geographic estimates and are not meant to directly reflect the SIPP data.
	Median Household Income	Median household income in the past 12 months	U.S. Census Bureau, 2011–2013 American Community Survey
	Income Poverty Rate	Percentage of all families with income in the past 12 months below the federal poverty threshold	U.S. Census Bureau, 2011–2013 American Community Survey
	Unbanked Households	Percentage of households lacking both a checking and savings account	2011 <i>FDIC National Survey of Unbanked and Underbanked Households</i> , for US, States, DC and 71 largest MSAs. Local Estimates: Estimates at smaller geographies are derived from CFED's statistical modeling process using the FDIC and 2008–2012 American Community Survey data. The figures are geographic estimates and are not meant to directly reflect the FDIC data.
	Underbanked Households	Percentage of households that have a checking or savings account but have used non-bank money orders, non-bank check-cashing services, payday loans, rent-to-own agreements or pawn shops at least once or twice a year or refund anticipation loans at least once in the past five years	2011 <i>FDIC National Survey of Unbanked and Underbanked Households</i> , for US, States, DC and 71 largest MSAs. Local Estimates: Estimates at smaller geographies are derived from CFED's statistical modeling process using the FDIC and 2008–2012 American Community Survey data. The figures are geographic estimates and are not meant to directly reflect the FDIC data.
	Average Credit Card Debt	Average amount of revolving debt (including debt from credit cards, private label cards and lines of credit) per revolving borrower	TransUnion (Q2 2014)
	Average Installment Debt	Average amount of installment debt per installment borrower	TransUnion (Q2 2014)
	Borrowers 90+ days overdue	Percentage of borrowers who are 90 days or more past due on any debt payments	TransUnion (Q2 2014)

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DATA MEASURES & SOURCES

	Data Measure	Measure Description	Source
Use of Services	Households Receiving SNAP Benefits	Percentage of households that have received SNAP (Supplemental Nutrition Assistance Program) benefits in the past 12 months	U.S. Census Bureau, 2011-2013 American Community Survey
	Households Receiving Public Assistance	Percentage of households that have received Public Assistance income in the past 12 months	U.S. Census Bureau, 2011-2013 American Community Survey
	Households Receiving SSI	Percentage of households that have received SSI (Supplemental Security Income) in the past 12 months	U.S. Census Bureau, 2011-2013 American Community Survey
	Total Tax Filers Receiving EITC	Percentage of tax filers that received an EITC (Earned Income Tax Credit)	Brookings Institute analysis of 2012 tax filing data
	Average EITC Received	Average credit received, in dollars, by tax filers who received an EITC	Brookings Institute analysis of 2012 tax filing data
	EITC Returns Prepared By Volunteer	Percentage of tax returns that received an EITC that were prepared by a volunteer	Brookings Institute analysis of 2012 tax filing data
	EITC Returns Prepared by Paid Preparer	Percentage of tax returns that received an EITC that were prepared by a paid preparer	Brookings Institute analysis of 2012 tax filing data
	EITC Refunds Received through Direct Deposit	Percentage of EITC refunds received through direct deposit	Brookings Institute analysis of 2012 tax filing data
Employment & Business Ownership	Unemployment Rate	Percentage of civilian labor force who are unemployed but actively searching for employment	U.S. Census Bureau, 2013 American Community Survey
	Average Annual Pay	Average annual pay for all workers covered by unemployment insurance	U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (2010)
	Self-Employed Workers	Percentage of workers 16 years and over who are self-employed	U.S. Census Bureau, 2010-2012 American Community Survey
	Microenterprise Ownership Rate	Number of firms with 0-4 employees (non-employer firms plus establishments with 1-4 employees), per 100 people in the labor force	CFED calculation based on U.S. Census Bureau, Nonemployer Statistics (2008), County Business Patterns (2008), and Current Population Survey (2008); U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics (2008)
	Vehicle Non-Availability by Working Household	Percentage of households (with at least one worker) lacking access to a vehicle	U.S. Census Bureau, 2011-2013 American Community Survey
Housing & Homeownership	Homeownership Rate	Percentage of occupied housing units that are owner occupied	U.S. Census Bureau, 2011-2013 American Community Survey
	Cost-Burdened Renters	Percentage of renter-occupied units spending 30% or more of household income on rent and utilities	U.S. Census Bureau, 2011-2013 American Community Survey
	Cost-Burdened Owners	Percentage of mortgaged owners spending 30% or more of household income on selected monthly owner costs	U.S. Census Bureau, 2011-2013 American Community Survey
	Affordability of Homes	Median housing value divided by median household income	CFED calculation based on U.S. Census Bureau, 2011-2013 American Community Survey data
	Seriously Delinquent Mortgages	Percentage of all mortgage borrowers currently 90 days or more past due on mortgage loans	TransUnion (Q2 2014)
Educational Attainment	Less than High School	Percentage of population 25 and older who have not completed high school	U.S. Census Bureau, 2011-2013 American Community Survey
	High School Degree	Percentage of population 25 and older who have a high school degree, GED or alternative degree only	U.S. Census Bureau, 2011-2013 American Community Survey
	Associate's Degree	Percentage of population 25 and older who have an associate's (2 year college) degree or some college	U.S. Census Bureau, 2011-2013 American Community Survey
	Bachelor's Degree	Percentage of population 25 and older who have at least a bachelor's (4 year college) degree	U.S. Census Bureau, 2011-2013 American Community Survey
	Graduate or Professional Degree	Percentage of population 25 and older who have a graduate or professional degree	U.S. Census Bureau, 2011-2013 American Community Survey

Family Assets Count is a national project of CFED and Citi Community Development, empowering decision-makers and advocates expanding financial security for vulnerable families in major cities across the US. By providing local data tools and convening key stakeholders, Family Assets Count helps promote the public dialogue and partnerships necessary to advance data-driven municipal solutions to household economic security.

