



Pathways to Progress
Focusing Philanthropy on Racial Equity and
Social Justice

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Pathways to Progress: Focusing Philanthropy on Racial Equity and Social Justice

The Challenges

Can [philanthropy](#) help create greater [racial equity](#) and [social justice](#)? How would we know if it did? And how could philanthropy be encouraged to do more?

Good questions, and the guiding questions in the first several years of this inquiry sponsored by Ford Foundation (2005-2009). In addressing them, we faced a few cautions:

Conversations using the terms “racial equity” and “social justice” are non-starters, we were cautioned. Humans learn about fairness at a very young age – at the kitchen table and the playground – and claims of unfairness and injustice easily lead to pushing and shoving, and worse. And that’s in contests with no racial overtones.

Proclaiming other people’s values or attitudes as good or bad would be counter-productive. Any kind of finger-pointing and blaming for the sins of omission and commission in the past or present also should be avoided in this inquiry, we felt.

While theory and definition can be important, the insistence that we get these perfectly right before taking significant steps can be a way of stalling and deferring progress.

We knew there are no easy criteria of success, no conventions for benchmarking progress in achieving greater justice and equity.

To keep our inquiry grounded in more productive territory, we decided to start with the notion of closing gaps or disparities, rather than the challenge of fixing people’s attitudes.

Rooting the inquiry in the goal to close gaps and disparities

Almost all studies conducted in how well society’s systems (education, justice) or markets (business development, health care) work show different system outcomes, on average, for different racial and ethnic groups. These studies show how our public systems do better for Whites, on average, than for other racial or ethnic groups. These differences in system performance for different groups are called disparities or gaps. They exist in almost every area of life. We compiled a small [inventory of these gaps](#) in an article.

For a variety of reasons these gaps are widespread, deep, and pervasive. They can have snowballing or cascading effects that run through the generations if not addressed.

This is shown in the chain of events suffered by young African Americans who perhaps make the mistake of riding their bike into the wrong neighborhood or boosting a candy bar. Police and other agents of the court still come down harder on these kids than on white kids (a disparity shown in all the data) who are more likely to be driven home and told to stay out of trouble when they behave in the same manner. Those early police records are frequently used to influence later decisions made by law enforcement, meaning that these kids have a harder time finishing school. The repercussions of youthful indiscretions continue, leading to other difficulties, and too often leading young African Americans to experience major disillusionment. When young people have a harder time getting work, it increases the likelihood of re-offending, and engaging in other self-destructive behaviors. These circumstances break up families, prevent economic self-sufficiency, prevent the development of self-respect and respect for the dominant culture, and virtually ensure widespread unhappiness and poor prospects.

And the role of philanthropy? Philanthropy – as distinct from government and from private enterprise – can be directed to the challenge of closing these gaps.

Nonprofit organizations, funders, and intermediaries of all kinds are involved with pieces of the problem, though examples of dealing with the whole elephant are rare.

In this project we (myself, Betty Emarita, and Vanessa McKendall Stephens) spent three years in the field in focused conversations with almost 100 different philanthropic organizations, searching for examples of philanthropy being directed to the challenge of closing gaps and disparities.

What can philanthropy do?

In this paper we present six Pathways to Progress, synthesized from our inquiries of the past several years. These pathways have been developed to help move philanthropy closer to racial equity and social justice. For each pathway we present several promising practices, examples as practiced in the field, and benchmarks for noticing progress.

Pathways to Progress

Pathway 1: Preparing the organization. Too many organizations that want to counter these trends are under-resourced and ill-equipped, matching up as David to Goliath. Philanthropic organizations can bulk up and shape their own organizational activities to close gaps in fields of interest that they care about. *Philanthropic organizations must act with clarity, focus and vigor, both internally and in their interactions with others.*

Pathway 2: Discussing social justice and racial equity safely. The terms social justice and racial equity often trigger emotional reactions which can get in the way of making progress. This makes trust, a necessary ingredient for bridging divides, a rare commodity. [*Philanthropic organizations*](#) can create or

support the kinds of conversations needed to build trust among community leadership for problem-solving.

Pathway 3: Crafting and advancing solutions. Good ideas – potential solutions that could fix these dysfunctional systems – are often resisted, and efforts to move them are often fragmentary and easily derailed. Going upstream – looking for opportunities to create solutions that prevent problems at their source – can pay off, but solutions have to be surfaced and promoted. *Philanthropic organizations can help move along good ideas and solutions that hold promise for closing gaps.*

Pathway 4: Strengthening relationships, networks and leadership. An infrastructure of support for change – relationships, networks, and associations of people – is often under-resourced, stymied, or disrupted. The relationships, networks and leadership in minority communities are often only partially visible or understood in the dominant culture, but are as important. *Philanthropic organizations can support the kind of networks and leadership needed to promote and implement good solutions.*

Pathway 5: Increasing philanthropic resources – time, talent and treasure. Philanthropic dollars for this kind of work are in short supply, especially compared to the resources used to maintain these disparities. The time and talent of people wanting to help fix unfair systems is in greater supply, but with too few channels for expression. Too few efforts take direct aim at the disparities. *For philanthropy to effect progress, more philanthropic resources devoted specifically to closing gaps in equity are needed.*

Pathway 6: Reducing barriers and changing conditions. Too many efforts have the effect of helping only individual victims or casualties of badly functioning systems. Strategy has to be directed “upstream” to reduce the flow of casualties. Philanthropic organizations can make progress if they keep focused on the challenge of gap-closing, and work on these pathways singly and in combination. *For philanthropic organizations to close gaps they should work on all the pathways, especially in combination, and stay focused on the challenge of reducing gaps.*

Our emerging theory of action. The more these pathways are engaged and productive, the greater the likelihood of justice and equity. With increased action on any one pathway, one can expect increased progress, but with increased action on these pathways in combination, one can expect even *more* progress. Producing the most meaningful progress requires combining all the pathways while keeping a focus on closing the gaps.

Signs of progress. The signs of progress are found along the pathways to progress. If the goal is to reduce a key equity gap in an arena you or your organization cares about, then progress is being made when you and your organization see signs that...

- You and your organization are more prepared than before to take on this task;
- you and your organization are better able to sustain a conversation about justice and equity;
- you are more actively engaged in crafting or advancing solutions that can help close that gap;
- you are in the business of strengthening relationships, networks, and leadership that can mobilize people, resources, and solutions;
- you are finding, gathering, and managing more time, talent, and treasure that can be directed to efforts that could close that gap;
- you are more focused on fixing one of the systems or markets that produces gaps, and more engaged in using the various pathways and practices suggested on this site.

Goals for this paper

- Present lessons to the larger field of philanthropy, basing them on the experience of people and organizations working to make equity and fairness happen.
- Serve as a guide, revealing pathways to progress for achieving greater fairness and equity in the way our society's systems and markets can work.
- Inform the field, from donors to activists, of the options and strategies available for making a difference.
- Show what "making a difference" looks like – a reduction in disparities and gaps – and presenting strategies in hopeful and positive ways.
- Show practical ways for a philanthropic organization to move forward, drawing on our "benchmark practices."
- Help philanthropic organizations find their way to longer term commitments, by encouraging them to stay grounded in the realities of reducing a key disparity that they care about.
- Provide a big tent for the variety of philanthropic organizations to recognize mutual opportunities to be useful, and providing a platform from which potential partners can find each other.
- Show the interconnections of organizational effectiveness, evaluation of progress, and the imperative to help achieve the American dream of justice for all.
- Show philanthropic organizations ways of "being effective" in achieving long-term results, and of accounting to stakeholders by "showing progress."

Pathway 1: Preparing the Organization to Address Social Justice and Racial Equity

The Challenge

The data are consistent: increasing [racial equity](#) and strengthening [social justice](#) remain challenges to our society. To [close gaps or disparities](#) in racial equity, [philanthropic organizations](#) must step up to the plate. Yet few are ready to take this on, and few are prepared to do the heavy lifting required to make a difference.

Barriers to progress include:

- The problems of injustice or inequity may be invisible or not believed by the organization's leadership. The organization may be too isolated from parts of the community experiencing the disparities.
- While some on the staff or board of the organization might be ready to engage with issues of injustice or inequity, too many might not. Without a local crisis, personal epiphany, or ah-ha moment, addressing issues of justice or equity is seldom No. 1 on the list of things to do.
- The organization may think engagement of these issues doesn't fit its mission, or that change will result in loss of donors.
- Much of one's learning in the arena of injustice and inequity requires facing long-held personal assumptions of what's just and what's fair, territory that's not easily visited.
- It's not always easy to step back and take a different look at framing one's work to have greater value.

Benchmark Practices. Progress is made when philanthropic organizations get good at these benchmark practices:

Examining how one's philanthropic interests are affected by issues of unfairness, injustice, and their root causes.

Tracking local indicators of the community's well-being, looking at all segments of the community, can yield fresh or surprising views of the health and ill-health of your community. For all your philanthropic interests, there are data showing very uneven signs of progress, due mostly to the complexity of how things really work. Helping your organization learn where your philanthropic interests are hindered by the presence of unequal playing fields keep many groups unable to fully benefit.

Becoming more familiar with how things really work in areas your philanthropy is interested in – whether education, health, arts, housing, or family well-being — will help

your philanthropy imagine steps that make a difference, that help level the playing field. The systems and markets that govern how well things turn out for people – how they benefit — need to be understood if we're to make sure benefits flow fairly to all.

Taking next steps in your inquiry of how to do philanthropy better requires, well, that you decide to take next steps. This might seem obvious, and it is, but it's amazing how much organizational movement just plain stops because there's no decision and follow through to keep things going, with accountability and reward.

Becoming more of a learning organization, to better align practice with values.

Stepping back as an organization to catch one's breath, so to speak, scanning the horizon, and exchanging perspectives with others can give it a new view of how the world is changing and the world it wants to help.

Putting issues of justice and fairness on the agenda for discussion by staff, board, and partners lets them reflect on tough issues, develop collegiality, look for new opportunities for philanthropy to produce more benefits for all, and advance a search for promising solutions

Helping your organization become a place where people can more easily talk about tough issues gives people the “safe space” needed to come out with their best stuff without fearing repercussion.

Getting training and coaching for oneself, staff and board to gain a better understanding of the dynamics of culture, context, and root causes of disparities and injustice can give them the “cultural competence” needed to work across cultures and context – skills needed for philanthropy to play a more helpful role and advance its own mission.

Asking questions and getting advice from different folks and new sources will help revitalize your knowledge base. Advisors, friends, or staff can arrange visits to new and different organizations active in your areas of interests, perhaps visiting parts of the region they might not otherwise go.

Upgrading its ability to incorporate themes of justice and equity into its practice.

Allowing your organization to step back, open the windows, breathe deeply and examine the way it works invites the possibility of positive change and updated effectiveness. Is talk allowed? Is innovation? Is learning from one's experience? Is being accountable to principles justice and fairness?

Re-examining your organization's ability to do a good job can't hurt. Even reflecting on what “doing a good job” means is bound to lead to new insights. The art of capacity-building has advanced considerably. There are tools – scorecards, self-assessment

protocols, discussion groups on-line, benchmarks, pathways to progress – and, of course, consultants who can help. .

Going deeper, there is specialized training on cultural competency, anti-racism, structural racism analysis – each appealing to different mindsets and stages of organizational readiness. Exploring these tools for integrating social justice into one's organization-building skill set can help bring the theoretical into practical reach.

Adding diversity of perspective, talent, and experience into positions of influence on staff and board helps position your organization to become more effective. Becoming more inter-connected with diverse communities will give you legitimacy, cover, authority, credibility, a good time, and better ideas – it's who you know that counts.

Signs of Progress. Philanthropy gets high marks for progress achieved on this pathway when you can see signs that...

- The challenge of addressing issues of justice or equity is rising on your organization's priority list.
- You're better at seeing, understanding, and talking about problems of injustice.
- You see a more constructive role for our philanthropy and are taking "next steps."
- Your organization is better connected to key segments of the community.
- Other, good organizations are more willing to work with yours on these issues, and you've gained more support from others than you've lost.
- There's more organizational development going on inside to prepare and position the organization to play a more useful role.
- There's a changed approach in the use of your assets, incorporating more of a commitment to address signs of equity and justice.

Examples of Good Practice

[Jacksonville Community Council, Inc.](#) has conducted multiyear studies to learn how issues of racial inequity affect quality of life in its community. A hallmark of its approach: drawing on a wide range of perspectives in gathering and interpreting data.

The [Boston Indicators Project](#) tracks trends, accomplishments, and challenges in ten key areas of civic life, enabling the community to set goals and monitor progress.

[The Long Island Community Foundation](#) asked the [People's Institute for Survival and Beyond](#) to conduct training for its staff and board. The result: a new initiative to erase racism.

Members of the board of the [Foundation for Midsouth](#), with support from a large private foundation, traveled well outside its usual territory – to South Africa, Brazil, Chicago – to better see the dynamics of racism. * On a smaller scale, a good function of staff is to

arrange for board, colleagues, and donors to visit other organizations that are active in this arena, perhaps visiting parts of town they might not otherwise go.

[Community Foundations of Canada](#), a national network, offers a program for its members that facilitates discussions around social justice in all foundation proceedings. It produced a “Poverty Toolkit: A Poverty Scanning Tool for Community Foundations,” which helps create self-guided discussions for staff and board on local issues of poverty, and on ways they can move closer to these issues. And its Vital Signs Project is part of a growing nation-wide initiative to measure quality of life and take action to improve it.

The [Diversity in Philanthropy Project](#), a voluntary effort of leading foundation trustees, senior staff and executives committed to increasing field-wide diversity through open dialogue and strategic action, believes that “diversifying perspectives, talent and experience can help ensure philanthropy’s continued leadership in a rapidly changing society.

[The Jessie Ball duPont Fund](#) went to court to get its bylaws changed so that, among other things, it could more easily diversify its board, and better “walk its talk.”

[Rainbow Research, Inc.](#) reviewed its operations budget and then worked to include more diverse vendors of everything from paper clips and travel agents to investment advice.

And of course, we like to think *this* website provides tools for preparing philanthropic organizations to address issues of social justice and racial equity.

Resources

Good to Great and the Social Sectors, by Jim Collins. *A Monograph to Accompany Good to Great*. 2005, www.jimcollins.com. Key quote: “It doesn’t really matter whether you can quantify your results. What matters is that you rigorously assemble evidence – quantitative or qualitative – to track your progress.” See also our complementary paper, [Thinking Differently About Evaluation](#), on this site.

[Becoming A Catalyst For Social Justice: A Tool For Aligning Internal Operations To Produce Progress](#). Produced by Betty Emarita for this project, 2006, available on this site under Resources.

Cultural Competency in Nonprofit Capacity Building (Pt 2). Produced by Brigette Rouson for the Cultural Competency Initiative of the Alliance for Nonprofit Management. <http://www.paradigmpartners.us/contact.htm>

African American Perspectives / Forty Films on Race in America. Available from *California Newsreel* (www.newsreel.org).

Race Matters. A tool kit available from Annie E. Casey Foundation.
<http://www.aecf.org/knowledgecenter/publicationsseries/racematters.aspx>

Organizational Development & Capacity in Cultural Competence: Building Knowledge and Practice. A monograph series produced by CompassPoint Nonprofit Services & supported by The California Endowment

Resources of the Diversity in Philanthropy project
(<http://www.diversityinphilanthropy.com>) of the Council on Foundations (www.cof.org)

Listen, Learn, Lead: Grantmaker Practices that support Nonprofit Results. A report of Grantmakers for Effective Organizations Change Agent Project, 2006.

Providing [Culturally Appropriate Technical Assistance](#) , produced by Betty Emarita for this project, available on this site under Resources

Improving Race Relations and Undoing Racism: Roles and Strategies for Community Foundations, Rainbow Research, Inc., 2001

Assessing your Readiness for a Stronger Anti-Poverty Role, part of a “toolkit on poverty for community foundations” produced by the Community Foundations of Canada, 2006.
<http://www.cfc-fcc.ca/poverty/assessing-readiness-e.cfm>

Pathway 2: Building Trust

The Challenge

The data are consistent: increasing [racial equity](#) and strengthening [social justice](#) remain challenges to our society. But to [close gaps or disparities](#) in racial equity, those involved with [philanthropic organizations](#) must be able to talk about the problem and build trust with others if they are to create opportunities to address these problems.

Barriers to progress include:

- The terms “social justice” and “racial equity” can trigger emotional reactions which can get in the way of making progress. It’s typically difficult for African Americans and European Americans to talk about fairness and justice, especially on those occasions when they’re together.
- It’s very easy for people to feel threatened by “the Other” and to stop listening. For example, it’s easy for both Black and White to feel threatened by the other, or isolated, or dismissed. Talking out loud about inequity or injustice can put us at risk; we may each fear repercussions from our superiors at work, our neighbors at home, or the community we “represent.” The social and organizational pressures to be silent can be substantial, chilling progress.
- Many people, especially of a dominant culture, often don’t see the problems of disparities. For example, White Americans are far more likely than Blacks to think that everything is working just fine, and to ignore the facts shown in virtually all the data showing unequal performance in how our systems and markets work. Complicating the problem, data presented by African American organizations are too easily dismissed by Whites as “biased.”

Benchmark Practices. Progress is made when philanthropic organizations get good at these benchmark practices:

Creating opportunities for safe conversation that can lead to relationships built on trust

Creating conversations that reveal people’s similarities more than their differences helps to create trust. Most people want the same things for their families and communities. Acknowledging this out loud helps to create connections and build trust. Trust is a 2-way street, regardless of who’s bigger and stronger.

Faith traditions and song-writers express this sentiment on the prerequisites to trust, here quoting Otis Clay: “Before you abuse me, criticize me, rebuke me, walk a mile in my shoes.”

Wrestling with potentially charged language is an on-going concern. The terms “racial equity” and “social justice” carry a lot of weight and often get tempers flaring. They have a way of getting to personal and historical issues that we as people have to learn to get beyond.

Using the language of “disparities” avoids discussion of personal attitudes, and is a way to get beyond many of the language and attitude problems. The language of disparities focuses on where our systems and markets are broken, and invites us to fix them for the benefit of all.

Some organizations find it easier not to talk about race, and instead to talk about “all people.” That can work for awhile, but if there’s not respectful and appreciative talk among partners, the partnership breaks down.

Learning a variety of ways to “frame” equity or justice or to use different “lenses” for viewing the world can help to get around or through the problems with language. Some people are comfortable with a “racial equity lens,” others with a “need” or a “class” lens. Others see things as “rural” versus “urban,” or “haves” versus “have-nots.” “Poverty” is a label that sometimes works because it does not refer directly to race or class or place, but can imply it. Many are helped by learning about their “white privilege.” In philanthropy, there’s a “social justice” versus “charity” lens; choosing one leads to very different grantmaking than choosing the other.

Supporting conversations that bridge divides — getting people together who wouldn’t ordinarily get together — has the potential of creating social capital that can be spent on efforts to reduce disparities. Building on existing capital to create more capital is also useful if then deployed well. Not using social capital to further just and fair ends, however, is a waste.

Supporting the development of working relationships and productive partnerships

Creating relationships built on trust and reaching across divides helps build on common interests and create common cause, the stuff of partnerships. One can’t fix broken social systems alone; one has to get good at partnering, finding those who bring something special to the effort. As in, “With my money and your brains, experience, and connections, maybe we can get something done.”

Strengthening networks in rural areas, where the usual disparities are made worse by relative isolation from markets, other people, and various amenities for keeping up in today’s world is especially necessary to create conditions for equitable development.

Helping to connect local nonprofits with local government, local nonprofits with national nonprofits, local nonprofits with local business associations, this coalition with that coalition — all helps to synergize their effort and catalyze new development.

Being able to say, without flinching, that you have an interest in maybe trying to help with these issues of fairness and justice

Showing an interest invites progress (in the form of relationships that can lead to partnerships) considerably more than showing none.

Promoting an agenda of learning, for your organization and your community, also advances the possibilities of trust.

Naming an issue for consideration and possible action by your organization in which questions of justice or equity are obviously present takes this trust-building another step.

Promoting reflection and healing — the pinnacle of trust-building

Exploring issues of equity and justice takes many people to a personal level. For those willing to go there, an unfamiliar part of one's self is revealed, which is almost always worth exploring. This seems true for those from a dominant culture, those from an oppressed culture, and for all those (most of us?) who are part of both. There's just something about "justice" and "fairness" that provokes both anger and love, both indignation and patience, heat and light. Recognizing this could make us all better "philanthropists."

Helping a process of reconciliation is part of the philanthropic tradition, especially those rooted in faith. The Rev. Jim Wallis defines philanthropy as "faith in action."

Discussing whether we're in a "post-racial society" now that a bi-cultural man has been elected President belong in this section.

Signs of Progress. Philanthropy gets high marks for progress achieved on this pathway when you can see signs that...

- The terms "social justice" and "racial equity" are less likely to trigger emotional reactions which can get in the way of making progress, especially with those you would want as allies.
- There is a greater sense of safety for yourself and others to speak up.
- More people, especially White Americans, are more likely to see the problem of disparities, and more likely to acknowledge that something should be done.

Examples of Good Practice

Asking the board of [Community Foundations of Canada](#) what they meant by "social justice" generated this remarkable list: "helping others, leveling the playing field, dealing with dis-advantagement, giving a hand up-rather than a hand-out, system change, root causes, and dealing with the causes of poverty." Some organizations find it easier *not* to

talk about race, and instead to talk about “all people.” Others find talking about race necessary to achieve a level of trust that attracts partners and support.

When meetings convened by [Jacksonville Community Council, Inc.](#) focused on “race relations,” finger-pointing and acrimonious discussion was the result. But by focusing on “institutional practices that create gaps,” the conversation turned to a productive search for solutions.

The [Jessie Ball duPont Fund](#) supports dialogues to promote understanding across racial lines.

At the [Foundation for the Mid South](#), a group of African American and White leadership traveled to South Africa, Brazil and Chicago, and throughout their own region, to create awareness of poverty and racism. Participants developed an extraordinary compassion for what they saw and bonded among themselves, setting the stage for further developments.

In conjunction with neighborhood-based organizations, three North Carolina community foundations, [Community Foundation of Greater Greensboro](#), [The Winston-Salem Foundation](#), and [Foundation for the Carolinas](#), created local civic engagement projects. The resulting discussions on justice and equity “cultivated the civic soil.”

The goals of the [Facing Race/We’re All in This Together](#) initiative of the Saint Paul Foundation fall into two categories – addressing racism at the individual level and addressing racism at the institutional level. The initiative is organized into phases because it will take time to address the deep-rooted problem of racism. In the first phase, the emphasis will be on individual action and change. Over time, the initiative will expand to include organizations and institutions.

As one board member of the [Black Belt Community Foundation](#), a start-up foundation based in Selma (Alabama), said, “We chose the right White people and the right Black people. Being able to talk about race issues is paramount... We have had the right White people at the right time. They understand that this foundation will not accept past structural inequities. They will be powerful ambassadors for the foundation.” From these conversations comes a foundation of trust. From trust come opportunities for partnership and leadership. From partnership and leadership come strategies for closing key equity gaps.

The [Beloved Community Center](#) in Greensboro, N.C. sponsored a Truth and Reconciliation Commission in the wake of 15-year-old atrocities in the city. The Commission conducted many sessions of public testimony and compiled a report. [The Community Foundation of Greater Greensboro](#) amplified the Commission’s impact by sponsoring a series of community discussions.

At the [South Carolina Association of Community Development Corporations](#), organizers understand that their region's history both supports progress and scares people away. This is a powerful dynamic that can become a useful tool for community development.

[ERASE Racism](#), an independent organization spun off from the [Long Island Community Foundation](#), studies opportunities for reducing inequities in fair housing practices and public education on Long Island. By cultivating relations with local news media, ERASE Racism is able to educate the public and be seen as an able ally.

[The Z. Smith Reynolds Foundation](#) and the [Mary Reynolds Babcock Foundation](#), two prominent regional family foundations in North Carolina, and the [Winthrop Rockefeller Foundation](#) in Arkansas explicitly name a concern for equity and justice as funding priorities. These issues gain legitimacy for all to see and become a priority for the foundation's use of grantmaking funds.

Resources

White Privilege: An Account to Spend and *White People Facing Race: Uncovering the Myths that Keep Racism in Place*. Both by Peggy McIntosh, 2009, produced for The Saint Paul Foundation.

A Social Justice Discussion Guide: Addressing Our Toughest Challenges. Produced by Community Foundations of Canada as part of its efforts to "deepen our understanding of how community foundations might help to 'level the playing field' for all Canadians by tackling the root causes of social problems." See http://www.cfc-fcc.ca/link_docs/pf_4_SJ_Discussion_Guide.pdf

[Moving Past the Silence: A Tool for Negotiating Reflective Conversations About Race](#), produced for this project by Vanessa McKendall Stephens, Ph.D., posted on this [site](#) under Resources.

Creative Community Builder's Handbook: How to Transform Communities Using Local Assets, Arts, and Culture. Available from Fieldstone Alliance. See <http://www.fieldstonealliance.org/productdetails.cfm?SKU=069474&disccode=ALLSITE>

The Dangers of NOT Speaking About Race, Kirwan Institute for the Study of Race and Ethnicity, 2006

Thinking Change: Race, Framing and the Public Conversation on Diversity. What Social Science Tells Advocates About Winning Support for Racial Justice Policies. Center for Social Inclusion, 2005.

Race: Are We So Different?, hosted by the Science Museum of Minnesota, produced by the American Anthropological Association, funded by Ford Foundation and National

Science Foundation and several Minnesota foundations. The exhibit examined the topic of race from scientific, historical and cultural perspectives, and invites people to various discussions. See www.understandingrace.org

Traces of the Trade: A Story from the Deep North, an award-winning film by Katrina Browne based on her troubling discovery that her New England ancestors were the largest slave-trading family in U.S. history, was screened at a national Council on Foundations meeting. Now, efforts at community engagement and discussion are underway, supported by a variety of government, civic, and faith-based organizations. See tracesofthetrade.org

White Like Me: Reflections on Race from a Privileged Son, by Tim Wise. See www.TimWise.org

Pathway 3: Advancing Solutions That Close Disparities

The Challenge

The data are consistent: increasing [racial equity](#) and strengthening [social justice](#) remain challenges to our society. But closing [gaps or disparities in racial equity](#) requires good ideas – ideas that address the underlying causes of a particular disparity, ideas that can be realistically implemented.

Barriers to progress include:

- Many good ideas or solutions have been proposed but collect dust on the shelf or wither on the vine, dying for lack of support or momentum
- Not everyone wants to see solutions. For some, there are real advantages to doing nothing.
- The dominant model of philanthropy – charity rather than development – keeps many agencies busy with addressing the needs of victims one at a time, rather than “looking upstream” to find the root causes of social problems.
- Moving a good idea from conception to implementation can be a long haul, involving many partners and jurisdictions, with resistance, inertia, and inconsistent funding encountered along the way.
- Good ideas coming from the African American community (unlike those coming from the White community) are more likely to be dismissed as “biased” or “self-serving,” if they’re even seen at all.
- The forces that resist a good idea are the same that maintain the disparities. Good ideas that can reduce the mortgage-application disparity, for example, are resisted by those who [think they] benefit from that disparity.
- Creating the community and political base to support promising solutions is insufficiently recognized as an essential step in reducing disparities.
- Too many funders believe incorrectly that advocating for policy change is against the rules.

Fortunately, there’s no shortage of energy for creating promising solutions that can close gaps in equity, but they have to be surfaced and advanced, and encouraged to gather momentum to successful implementation and fruition.

Benchmark Practices. Progress is made when philanthropic organizations get good at these benchmark practices:

Actively learning about how a particular injustice or disparity works

Finding data that expresses how a particular disparity works over time can help you find where best to intervene with philanthropic resources. Most disparities show up as different rates of admission or advancement (to education, to health, to life without harassment, to careers, to credit, to dignity, etc) for different groups. Data on most

disparities are collected by government agencies, academic centers, and nonpartisan and nonprofit policy centers.

Finding *explanations* for these disparities is subject to many biases, friendly and unfriendly, fair and unfair. Getting perspective from those inside and outside the problem is essential. It's important to "look upstream" of the problems to see what's causing them, and to design better prevention or earlier intervention strategies.

Helping your community discuss the problem *and* solutions *and* possible indicators of short-term and long-term success allows broader buy-in, political cover, breadth of good advice, and support. Who doesn't want to be seen as helping along a good idea?

Finding ways to monitor changes in problem indicators that you want to effect with your philanthropic activity

In learning about how a particular injustice works, you've no doubt come across published data expressing the magnitude of the problem, and how it has changed for the worse or better over the years. Hopefully these data exist for the community you're interested in helping. Deciding which data you want to influence through your actions is a big step in making your philanthropy more useful.

The challenge of "moving the needle" or "bending the trend lines" suggests you've found some external indicators or signs of progress you wish to move or bend. Such measures, carefully chosen and determined to be fair and reliable, need to be monitored regularly if one is to learn about progress in fixing the problem. Measures are often available to the public from government sources or from higher education, or they can be specially constructed.

Look "upstream" in your search for what causes "downstream" problems, the problems that show up in indicator data. Creating some reasonable goals is the key. You're not going to fix the problem by yourselves. It will take some combination of other trusted people, good ideas, money, will, support — and even then, who can tell what will happen? It's important to stay focused, adopt a spirit of innovation, to learn while doing, and to keep others informed and engaged.

Getting clear among your allies on "what success should look like" helps to keep everyone rooted in a common goal of moving the particular needle you've chosen to represent progress. Keep each step simple, and for each step there should be a simple outcome or result on which to build subsequent steps. Keeping ambitions within reach of resources available (yours, theirs) is important.

Choosing bottom lines worth measuring or noticing is less of a scientific choice and more of a political one than one might imagine. Just as the framing of problems is important (see Building Trust), so is the framing of success.

Developing the art of moving good ideas into widespread practice

Moving ideas into practice is essential if we're to get beyond the idea stage. This seems obvious, but we've learned how widespread is the tendency to ask for more studies, allowing us to admire the problem rather than actively address it. OK, so we don't always know what solutions will work, so let's test the most promising ones, invoking the spirit of R&D and innovation, and actively learning what is likely to work.

If our public systems and private markets are broken — and they are, producing different outcomes for different groups — let's try to fix them until we get them right. There is a continuum of implementation to be mastered — from conception of good ideas, to trying them out and learning their pros and cons, to making improvements and rolling them out in ways that stand to succeed, to full implementation with monitoring to be sure it's done right and the intended effects are the actual effects.

Not everything can go from “pilot” to “scale” in one jump. There's a great deal of important variation in place to place that can affect a promising solution, and we have to learn their importance. Multiple tests in multiple settings or jurisdictions is important. “Beware of geeks bearing formulas,” said Warren Buffet, ruing the blind devotion given to incomplete math models of the economy.

The evaluation questions change as our knowledge of a potentially good idea moves down the line. “Does this seem like a good idea?” becomes “Does this *still* seem like a good idea, knowing what we know now? Can we improve on it further? How will we decide it adds value, or creates even bigger problems?”

Not all field-leveling or gap-closing happens through legislation or the adoption of an official policy. Not all happens at once at the national level or state level, or industry-wide or company-wide. The Civil Rights acts of the 1960s created big changes, but it didn't fix everything. The election of Barack Obama was a signal event, but it too won't change everything. Sometimes change happens in much more subtle, incremental ways that are never mandated by official authority, but seem to originate at the kitchen table, a meeting room, the street, or a dream. Some solutions are so quietly implemented we don't even notice for awhile that they're happening.

Coming to know one's power to influence change is, as every one who has tried knows, a life-changing awareness. Everyone can play a role, and every organization can play a role. Of course, everyone resists change in their way as well, but ultimately there is flow. The way in which overtly anti-racist talk and behavior has ebbed in the last 20 years is an example of change that's “in the water” more than something mandated specifically by institutional authority. Its time had come. Moving toward progress, moving better ideas into place, from kitchen table to conference table to treaty table, is one of the major pathways discovered in this research effort.

Helping your community learn, helping it invest in ever-better ideas, is likely to accelerate positive change and help it triumph over negative resistance. A message: some investments work, others don't; let's learn the difference.

Signs of Progress. Philanthropy gets high marks for progress achieved on this pathway when you can see signs that...

- Promising solutions for furthering social justice and closing disparities or gaps in racial equity are gaining more support.
- The model of philanthropy practiced here is more likely to look upstream in search of good solutions than used to be.
- More people in positions to be helpful are wanting to advance effective solutions to problems of justice and equity.
- Past work intending to address disparities or injustice is being recognized and re-introduced for consideration.
- Resistance or inertia to moving good ideas along is decreasing or less effective.
- Good ideas coming from the African American and other minority communities are more likely to be considered than before.

Examples of Good Practice

[Jacksonville Community Council, Inc.](#) utilizes a highly participatory model where many people are engaged in a learning process. The results are then submitted for public discussion. Data can come from national bodies, such as [Kids Count](#), [U.S. Census Bureau](#), and [National Urban League](#).

[PolicyLink](#) provided much of the data for Tavis Smiley's Covenant with Black America, which details disparities in ten key areas of community life, and presents advice on what individuals can do, what the community can do, and what elected officials can do.

[The Heifer Foundation](#) raises money in support of Heifer International's programs throughout the world, with catalogs that describe their vision to end hunger and poverty, and to care for the Earth by creating projects of just and sustainable community development, accented by gifts of livestock and traditions of stewardship.

[Winthrop Rockefeller Foundation](#) (Arkansas) has supported the development of curricula and materials for use in public schools that feature new views of justice as it has and has not played out in the state, and has advocated teaching the history of race relations in Arkansas.

Measures, carefully chosen and known to be fair and reliable, can be monitored to indicate progress in fixing the problem. Measures are often available to the public from government sources or from higher education, or they can be specially constructed. See

Boston Indicators Project, Twin Cities Compass, Canada's Vital Signs 2008 for examples.

Civic engagement and community organizing can strengthen the base of support needed to press for and implement solutions to inequity and injustice. [Arkansas Public Policy Panel](#) works at grassroots, low-income levels to create discussions of issues children and families face. Ideas can result in legislative proposals. [Arkansas Advocates for Children and Families](#) frames key messages for policy development. Proposals are crafted and supported through the legislative and implementation process. To advocate solutions, both these groups draw on coalitions of citizen groups. To create a program of Individual Development Accounts in the state of Arkansas, the [Southern Good Faith Fund](#) helped write legislation drawing on ideas surfaced from numerous community discussions.

A longstanding misconception in philanthropic circles holds that advocacy and lobbying are not permitted by charitable organizations. But in fact, Congress has stated that influencing legislation is an appropriate and legitimate activity for charitable organizations, and in 1976 it passed legislation giving public charities the right to lobby up to defined percentages of their annual expenditures. Advocacy, short of endorsing specific candidates for office, is legal for philanthropic organizations, and necessary to help move solutions along. Several national umbrella organizations, such as [Independent Sector](#) and [Alliance for Justice](#) provide materials in support in educating philanthropic organizations on the tremendous latitude provided in the law to permit advocacy and lobbying. The [National Committee for Responsive Philanthropy](#) in studying 14 nonprofit organizations in New Mexico, NCRP says, "for every dollar invested in the 14 groups for advocacy and organizing (\$16.6 million total), the groups garnered more than \$157 in benefits for New Mexico communities."

The [Jacksonville Community Council, Inc.](#), conducted intensive community-based studies of conditions in Jacksonville and how to improve them. They now work to keep alive the good recommendations from the studies.

The [South Carolina Association of Community Development Corporations](#) encourages its members to recognize their rights and their responsibilities to their communities, to step up and participate.

[ERASE Racism](#) changed key provisions of Nassau County's fair housing ordinances.

[Arkansas Advocates for Children and Families](#), working with a variety of other groups, wrote legislation that reduced the number of uninsured low-income children in the state.

When the budget was cut, [Lee County Community Development Corporations](#), working in the Arkansas Delta, created new ways to offer education to its members.

[Alaska Rural Community Health Economic Strategies](#) used new funding streams to create job positions and educational opportunities that support the viability of Native village life.

Minneapolis' [Council for Crime and Justice](#) , supported by The Minneapolis Foundation and others, has helped the community trace the cause of racial disparities in criminal justice outcomes to flaws in the operation of the criminal justice system, and has proposed legislative, judicial, and executive remedies.

[Effective Communities](#) produces an awards program – the Effies© – to recognize excellence in grappling with gaps and disparities.

Resources

The Way It Was in the South: The Black Experience in Georgia, by Donald L. Grant. University of Georgia Press, 1993.

The Covenant with Black America, Tavis Smiley (ed) with research support from PolicyLink. Also, *The Covenant Curriculum in The Covenant in Action*, Smiley Books, 2006.

Hope Unraveled: The People's Retreat and Our Way Back, by Richard C. Harwood, 2005 *The Nonprofit Lobbying Guide*, second edition. Bob Smucker, Independent Sector, 1999.

The Nonprofit Lobbying Guide, second edition. Bob Smucker, Independent Sector, 1999.

Strengthening Democracy, Increasing Opportunities: Impacts Of Advocacy, Organizing, And Civic Engagement In New Mexico, by Lisa Rangelhelli, National Committee on Responsive Philanthropy, 2008.

Worry-Free Lobbying for Nonprofits, by Alliance for Justice.

Evaluation With A Diversity Lens: Exploring Its Functions and Utility to Inform Philanthropic Effectiveness, by Ricardo A. Millett, senior consultant to Diversity in Philanthropy Project, 2009.

Pathway 4: Relationships, Networks, and Leadership

Strengthening Relationships, Networks and Leadership

The Challenge

The data are consistent: increasing [racial equity](#) and strengthening [social justice](#) remain challenges to our society. But closing [disparities or gaps](#) requires that people come together to support change, especially the kinds of solutions that will close these gaps. This requires [relationships](#) based on trust, the growth of networks, and capable leadership.

Barriers to progress include:

- Trust, of the kind that comes from respectful listening and talking, is essential for bridging divides, but is an insufficiently widespread commodity.
- The relationships, networks and leadership in minority communities that can advance good ideas are often only partially visible to predominantly white philanthropic organizations – and even less well understood –
- The networks of support to develop leadership in minority communities are not well-enough developed to advance the solutions needed to produce more equitable development.
- In rural areas especially, the costs of travel or long-distance communications needed to advance good ideas are significant and must be borne by the community.
- The legacy of Jim Crow — fear against coming together in common cause to explore problems and advance solutions — is still strong, inhibiting the full development of social capital. The risk of intimidation is still part of the collective memory of African Americans, which regrettably serves to keep down the spirit and energy needed to forge ahead.

Benchmark Practices. Progress is made when philanthropic organizations get good at these benchmark practices:

Supporting networks of people and groups to create the support and momentum needed to implement solutions that reduce disparities

Providing support for staffing and organizing such networks and groups supports civic engagement and the exchange of information and education on issues.

Supporting network meetings and conferences for exchange of information and education on issues is a cornerstone of policy development in all the arenas of American life, and the bedrock of America's hotel and travel industry.

Supporting networks' research and testing of possible solutions in settings where they can be fairly monitored creates energy and momentum in the search for productive remedies to injustice and unfairness. Convening funders, nonprofit and community organizations, policy-making organizations and other intermediaries can serve these same purposes, as well as create commitment, movement, and wider accountability.

Supporting and strengthening networks in rural areas is especially helpful in overcoming the effects of rural isolation and distance to enable development.

Producing materials to educate such groups and communities on the realities of equity and justice as well as on potential remedies helps to create a body of information that all can draw on. Creating excellent opportunities where all can learn from these materials is an essential companion piece.

Advancing a set of recommendations to larger audiences for consideration and action, drawing on the support of more and more people, increases the chances that progress will happen.

Supporting the organizational and leadership skills of those who want to be part of the solution

Strengthening the leadership and organizational skills of emergent leaders helps them interact productively with a broader section of stakeholders. Helping established leaders with this does, too.

Supporting networks and associations of a variety of racial, ethnic and cultural groups helps us strengthen our abilities and courage to step up, advocate for productive solutions, and play productive partnership roles.

Thinking through which skill sets can be useful to justice and equity partnerships is a worthwhile exercise necessary for reducing isolation and building common cause for productive solutions.

Learning to use a racial equity lens, poverty lens, rural lens, etc, as well as the lenses of white privilege and equitable development creates a whole new palette of opportunities. Communications skills, critical thinking skills, management skills, emotional intelligence skills – all look different when examined through these lenses. See Pathway on this site, Building Trust.

Nurturing the long-term quality of the social justice workforce

Recognizing that new and probably younger leadership is needed to help move philanthropy closer to issues of social justice and racial equity, philanthropy can support pro-active steps to assure quality in the next generation workforce.

Supporting workforce development in this arena helps to assure its future. Talent of color and diverse experience needs to be cultivated. Burnout needs to be prevented. Career ladders need to be extended. Leadership coaching and mentoring tailored to bridging divides and advancing agendas needs to be developed.

Developing the potential of careers in social justice and social justice philanthropy, if it were on the agenda of academic centers of philanthropy and philanthropic affinity groups, would help to legitimize social justice career tracks, extend career ladders, and open doors to possibility.

Signs of Progress. Philanthropy gets high marks for progress achieved on this pathway when you can see signs that...

- A particularly counter-productive legacy of Jim Crow – the fear of coming together in common cause to explore problems and advance solutions — is losing its grip, such that there is greater participation in efforts to address inequity or injustice.
- The networks of support to develop leadership in minority communities are getting stronger and better able to advance the solutions needed to produce more equitable development.
- The relationships, networks and leadership in minority communities that can advance good ideas are increasingly visible and better understood by predominantly white philanthropic organizations.
- Trust, of the kind that comes from respectful listening and talking, is an essential and increasingly available commodity for bridging racial divides so that you can create and implement solutions beneficial to all.
- The leadership that can knit communities and agendas strong enough to close gaps is increasing in quality and numbers.
- The costs of supporting networks, especially in rural areas, are increasingly supported. borne through philanthropy.

Examples of Good Practice

The Dade Community Foundation, through a partnership with other funders, has created a Fund for Community Organizing, “to foster grassroots community organizing as a vital strategy to building strong, equitable communities.”

The African American giving circles affiliating with the [Community Investment Network](#) encourage their giving circle members to get to know each other and draw on their own experiences to frame their interests in “giving back.”

[The Community Foundation of South Wood County \(Wisconsin\)](#) is a primary partner of an advanced leadership institute drawing highly diverse segments of the community. Members meet over several months to gain new perspectives and form relationships. In

a rural community threatened by global economic forces, they make forward movement possible.

One focus of [Emerging Practitioners in Philanthropy](#) is to help the field face the twin challenges of building a strong career pipeline that continually refuels the field's talent, and ensuring healthy inter-generational transfer of leadership in broader civil society. EPIP builds networks of emerging and experienced colleagues by creating local chapters in communities across the U.S. and the world.

The [Initiative For Nonprofit Sector Careers](#), a project of American Humanics, is a national campaign to recruit, prepare, and retain a skilled and diverse next-generation of nonprofit sector leadership.

[Resource Generation](#) is a national organization that works with young people with financial wealth who are supporting and challenging each other to effect progressive social change through the creative, responsible and strategic use of financial and other resources.

[The New World Foundation](#) supports sabbaticals and leadership transitions for community organizers.

[AJAMM](#), a ministry for African American women ministers, makes leadership development central. The women influence change both inside and outside church walls, becoming models through which social change can happen.

[The Arkansas Public Policy Panel](#), the *South Carolina Association of Community Development Corporations* and groups supported by [New World Foundation](#) developed strong community organizing processes .

[Southern Partners Fund](#) focused on the realities of life in poor and disenfranchised communities. Their democratic philanthropy – member organizations of the Fund have equal voice in decision-making – addresses inequities in the South.

[The National Center for Black Philanthropy](#) is to promote giving and volunteerism among African Americans, foster full participation by African Americans in all aspects of philanthropy, educate the public about the contributions of Black philanthropy, strengthen people and institutions engaged in Black philanthropy, and research the benefits of Black philanthropy to all Americans.

[Association of Black Foundation Executives](#) promotes effective and responsive philanthropy in Black communities.

[Hispanics in Philanthropy](#) strengthens Latino communities by increasing resources for the Latino and Latin American civil sector and by increasing Latino participation and leadership in philanthropy.

[Native Americans in Philanthropy](#) seeks to engage Native and non-Native peoples in understanding and advancing the role of philanthropy through practices that support traditional Native values.

[The Mary Reynolds Babcock Foundation](#), a regional foundation focusing on rural development, supports networks of people working to advance economic and social justice.

[Faith Partnerships, Inc.](#), a network of African American churches largely in North Carolina, facilitates partnerships across denominational, county and international lines. This work brings them to partnerships with majority networks of banking entities and political bodies.

The [South Carolina Association of Community Development Corporations](#) is expanding the Community Development Corporations movement by raising leaders' motivation, commitment, spiritual connection and energy. Participants gain confidence to interact with county boards of supervisors, banks and the state legislature.

The [Heifer Foundation](#), an international body, connects donors with local interests to similar developments around the world, greatly increasing their worldview.

[Arkansas Advocates for Children and Families](#) frames key messages for policy development. Proposals are crafted and supported through the legislative and implementation process.

To create a program of Individual Development Accounts in the state of Arkansas, the [Southern Good Faith Fund](#) helped write legislation drawing on ideas surfaced from numerous community discussions.

[The National Rural Funders Collaborative](#) supports "learning communities," helping participants from different settings identify common elements of strategy.

[MDC, Inc.](#) annually brings together the highly diverse participants of the [Ford Foundation](#)'s Community Philanthropy and Racial Equity project for the same purposes.

[Appalachian Ohio Regional Investment Coalition](#) formed a regional network for advancing rural development policy.

Resources

Social Citizens: Individuals who are energetic and passionate about social causes; brimming with new approaches and ideas for problem-solving; disposed toward sharing the responsibilities and rewards of affecting change in the world; and equipped with the

digital tools and people power to make it happen. By Alison Fine, 2008. Available from the Case Foundation.

Funding Community Organizing: Social Change Through Civic Participation. Available from Grantcraft.org

Towards a More Democratic Vision of Rural Community Giving, by James Richardson and Athan Lindsay. Available from National Rural Funders Collaborative, www.nrfc.org

[*Relationships as Infrastructure in Southern African American Communities*](#), produced by Betty Emarita for this project, available on this site in Resources.

[*Providing Culturally Appropriate Technical Assistance*](#), produced by Betty Emarita for this project, available on this site under Resources

Strengthening Democracy, Increasing Opportunities: Impacts of Advocacy, Organizing and Civic Engagement in New Mexico by Lisa Ranghelli, National Committee on Responsive Philanthropy, 2008

How People Get Power, second revised edition, by Si Kahn, National Association of Social Workers Press, Washington, 1994; first edition, McGraw-Hill, New York, 1972.

Organizing: A Guide for Grassroots Leaders, second revised edition, by Si Kahn, National Association of Social Workers Press, Washington, 1991; first edition, McGraw-Hill, New York, 1980.

Pathway 5: Philanthropic Resources

Increasing Resources to Address Disparities and Gaps

The Challenge

The data are consistent: increasing [racial equity](#) and strengthening [social justice](#) remain challenges to our society. But the amount of money that institutional philanthropy directs toward closing [gaps or disparities](#) in racial equity is minuscule compared to money with no such purpose.

Barriers to progress include:

- The term “philanthropy” is alien to so many people, even though it’s so widely practiced.
- The false belief stemming from mainstream 19th and 20th century philanthropy that “philanthropists” are White and old, if not dead, limits entry to participation.
- Models of philanthropy historically have been more focused on helping the needy than on fixing systems that contribute to problems.
- The amounts given to “social justice” represent a very small portion of the total giving pie.
- Philanthropy’s endowed funds are often invested in ways that work against social justice, rather than helping it.

Benchmark Practices. Progress is made when [philanthropic organizations](#) get good at these benchmark practices:

Helping groups, communities, and individuals discover the power of their giving, and what they have to give

Uncovering the philanthropic traditions of various communities – women, youth, African American, Native American, all immigrant groups — serves to unlock their potential to be advance solutions that better include them in the all word of “with liberty and justice for all.”

Uncoupling philanthropy from formal institutions arouses the volunteer can-do spirit America is famous for. Philanthropy isn’t just for dead white men and their lawyers any more. Philanthropy isn’t even just about money any more – it’s about “time, talent, and treasure,” a far broader concept that invites all to participate. Because everyone can give something, philanthropy has become democratized. If only we could think of a better word for it.

Helping people and communities think of themselves as suppliers or producers of good ideas and solutions, rather than as beggars or consumers of charitable welfare provides

them with a whole new way of looking at their plight and their prospects, and energizes the hunt for solutions.

Instituting opportunities for volunteer service, drawing on people's time and talent more than their treasure, opens the door for people to become engaged with community problems (and solutions) in ways they might not otherwise. Voluntarism is booming; "volunteer management" is a degree program. Community service is a frequent requirement for high school graduation. National service is on the table. "Commit random acts of kindness" is a popular bumper sticker. This is philanthropy on a grand scale, and if some of it can be directed to fixing in addition to ameliorating, so much the better.

Stepping up with a beefier role for your philanthropic organization

Designating more of the program budget to social justice and racial equity allows you also to raise more money for social justice. Themes of social justice, even themes that seem controversial, have consistently been shown to attract rather than repel donors.

Dedicating assets beyond the grantmaking budget, considering your operating budget and portfolios of investments (of treasure, time, and talent) reveals new opportunities support justice and equity. Endowment funds can be used for more than earning income; mission-related investing, proxy voting, screening investments – all allow you to express your intentions. Your operating budget allows you to send each dollar you spend in new directions.

Drawing on the social and reputational capital of your board, individually or collectively, is a way of putting the organization's mouth where its money is. Reminding board members that this service allows them to play a different role than their service as business owners, professionals, or civil servants – they can be philanthropic, with all the nuance that the word allows.

Developing special opportunities can attract contributions from donors discovering their interest in helping to fix obvious situations of inequity. A large number of philanthropic organizations in the path of Hurricane Katrina created special funds for distributing relief funds collected from near and far.

Allocating your resources to make a difference, create impact, move the needle, to bend those trend lines – all those magnificent goals of philanthropy – requires a different model of giving than just writing a check to a worthwhile cause or even building a building in your name. Making a difference means, by our definition, adding to the forces needed to move a particular needle or bend a particular trend line.

Considering different models and philosophies of allocating assets can shake up thinking and open creativity. "Social investing" discussions go here; we endorse focus on

“results,” but results like “closing the achievement gap” cannot be done with one grant, by one organization, or with one hundred thousand dollars. Concerted efforts that ply all the pathways are needed, worked over time and constant intentionality to close a particular gap. The field has to learn how to fund concerted efforts. We salute discussions of “social returns,” not just “economic returns,” and the concept of double and triple bottom lines. But more realistic expectations and more modesty is needed in most of those claims.

Recognizing that not everything useful has to be big, there’s still great power in small gifts, spontaneous gifts, gifts that are obviously valuable to the recipient – all have a place. We think they are especially valuable if done in the context of a bigger picture. This is sometimes called “giving by design.”

Attending to the transparency of your transactions, and accountability to proper authorities, keeps you viable and attractive as a collector of assets. Trust is a big issue in some communities, extending to questions of who gets to hold the money, who gets to decide where it goes, and who decides whether it was well spent after all. If money collected in the name of social justice is squandered, wasted, or otherwise blown, it burns the very bridges you’d worked so hard to build.

Learning to brag appropriately for how you’re spending your philanthropic resources rather than how much you’ve managed to raise would be a big step forward. It would suggest your organization has an interest in being useful, not just showy.

Signs of Progress. Philanthropy gets high marks for progress achieved on this pathway when you can see signs that...

- There is greater understanding among a broader base of people of what “philanthropy” means and what it can do.
- There is greater awareness, especially among the stewards of “old money,” of the various tools they can legitimately use to pursue goals of equity and justice is legitimate, fruitful, and consistent with their current missions.
- More money, especially in relation to total giving, is targeted to issues of social justice and racial equity.
- More philanthropic activity and resources is devoted to fixing the systems and addressing the root causes of poverty, inequity, or injustice.
- A greater slice of the philanthropic assets is invested in ways that advance the philanthropy’s mission, or at least don’t conflict with it.

Examples of Good Practice

The [Black Belt Community Foundation](#) covers an Alabama area with limited monetary resources. Its motto is “Taking what we have to make what we need.” Rather than starting with financial donors, the foundation sees the community as the endowment,

starting with its people. They represent talent, skill, dedication, kinship/friendship networks, inter-generational wisdom, commitment to nurturing youth and the preservation of cultural wisdom from many traditions. These strengths keep this community despite limited financial resources.

[The Southern Rural Development Initiative](#) created a special tool that allows communities to assess the location of philanthropic capital. With the Philanthropy Index, individual rural communities and small towns in the South can assess their ability to create a permanent charitable fund to support community life. It combines objective data with the collective knowledge of community leaders to measure philanthropic potential.

The [Community Investment Network](#) is a network of African American giving circles, in which young professionals learn about the power of creating solutions for their communities, and discover opportunities for making a difference with their resources. [HindSight Consulting](#), organizers of the *Next Generation of African American Philanthropists*, coaches and assists this network.

The [New Mexico Community Foundation](#) addresses wealth creation in ways that honor local culture; from the revival of buffalo herds, sheep and wool production, to sweat equity. Revitalizing these assets allows more trade to occur and local wealth to grow.

[The Twenty-First Century Foundation](#) is a national foundation and public charity that makes grants to support African American community revitalization. It supports donors with program design, grantmaking, administrative record keeping and money management. It has created the Black Men and Boys Initiative, the African American Women's Fund, the Fund for Greater Harlem and the Metro Chicago Fund as ways to focus donors' interest.

The [Arkansas Community Foundation](#) has 25 affiliates – local foundations at work in 33 mostly rural counties. Similar to branch banks, affiliates are led by boards of local community leaders. They make local grants and develop more grantmaking resources. Hurricane Katrina evoked a huge outpouring of sympathy and compassion from all over the country and the world.

A large number of philanthropic organizations in the path of Hurricane Katrina created special funds for distributing relief funds collected from near and far. Examples: [Foundation for the Mid South](#), [Bush-Clinton Katrina Fund](#), and the [Louisiana Disaster Recovery Foundation](#).

SpectrumTrust (formerly known as the Diversity Endowment Funds) is a partnership between communities of color and [The Saint Paul Foundation](#) that has built permanent endowments within communities of color throughout Minnesota. They include the Asian Pacific Endowment, the Pan African Community Endowment, El Fondo de Nuestra Comunidad, Two Feathers Endowment, and the Multicultural Endowment.

The [Hamilton Community Foundation](#) (Canada) has committed *all* of the Foundation's discretionary grantmaking dollars to its Tackling Poverty Together initiative.

The [Arkansas Community Foundation](#) matched funds put into their local affiliates, creating a larger pot for grantmaking.

The [Jacksonville Jaguars Foundation](#) pledged larger grants over multiple years to specific youth-serving agencies that demonstrate success in providing services to low-income and minority communities.

The [Community Foundation in Jacksonville](#) (Florida) allocated two-thirds of its unrestricted grantmaking budget to its "Education for All" initiative.

The [Community Foundation of Ottawa](#) recast its grants program to follow the assets model of community development, gaining a new spectrum of opportunities to choose from in its social justice efforts.

The [F.B. Heron Foundation](#) focused on a double-bottom line – financial return plus social return – on investments. The foundation put more of its assets to work. Not only some of the excess cash flow normally designated for grantmaking – but 24% of its endowed assets as well, expanding on the idea of mission-related investing.

The [National Committee for Responsive Philanthropy](#) promotes the concept of "social justice philanthropy" through its materials, such as with this definition: "Social justice philanthropy is the practice of making contributions to nonprofit organizations that work for structural change and increase the opportunity of those who are less well off politically, economically and socially (2003)."

The [Community Investment Network](#) encourages organizations and individuals to think and act more strategically with their giving to impel greater social change in their communities.

The [Social Justice Funding Collaborative](#) is a growing network of national organizations within the field of philanthropy that calls on grantmakers and donors to increase and deepen their commitment to funding social change.

The [Philanthropic Initiative for Racial Equity](#) (PRE) is a multiyear project intended to increase the amount and effectiveness of resources aimed at combating institutional and structural racism in communities through capacity building, education, and convening of grantmakers and grantseekers.

The [Diversity in Philanthropy Project](#) is a voluntary effort of leading foundation trustees, senior staff and executives committed to increasing field-wide diversity through open dialogue and strategic action.

Resources

Compounding Impact: Mission Investing by U.S. Foundations, by Sarah Cooch and Mark Kramer. FSG/Social Impact Advisors, April 2007.

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Rethinking the Philanthropic Script: Community Philanthropy, Collective Giving and Giving Circles, by Darryl Lester and Athan Lindsay. Responsive Philanthropy, Summer 2009. www.NCRP.org

Guide to Social Investing, by Working Group for Effective Social Investing, 2008.

From Grantmaker to Leader: Emerging Strategies for Twenty-First Century Foundations. Frank L. Ellsworth and Joe Lumarda, Eds. John Wiley and Sons, 2008.

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Social Justice Grantmaking II. Foundation Center 2009. Available at www.FoundationCenter.org

Effective Philanthropy: Organizational Success Through Deep Diversity and Gender Equality, by Mary Ellen S. Capek and Molly Mead. Available from www.effectivephilanthropybook.org

The Color of Wealth, The Story Behind the U.S. Racial Wealth Divide, by Meizhu Lui, Barbara Robles, Betsy Leondar-Wright, Rose Brewer, Rebecca Adamson. The New Press, 2006

Policy Points, a publication of the Southern Good Faith Fund Public Policy Program (in Little Rock), explicitly acknowledges the connections between philanthropy and policy work. The Southern Good Faith Fund is an affiliate of Southern Bancorp, Inc., and is “committed to increasing incomes and assets of low-income and low-skilled residents in rural communities. See www.southerngoodfaithfund.org

The State of the South 2007: Philanthropy as the South’s “Passing Gear,” by MDC Inc, Chapel Hill.

Tables of Giving Toolkit, published by Faith Partnerships, Inc (Raleigh), is “a learning resource to encourage faith institutions to assess community needs and assume their rightful role as community philanthropists as they work to pool financial assets to

address some of the systemic ills that blight our communities.” See www.faithpartnerships.org

On the Brink of New Promise: The Future of U.S. Community Foundations, by Lucy Bernholz, Katherine Fulton, and Gabriel Kasper. “...within and around community philanthropy. Every individual community foundation—and the field as a whole—will face new choices. The path ahead is full of promise. Unfortunately, that promise will not be easily realized.” See http://www.blueprintrd.com/text/foc_FINALfutureofcommunity_complete.pdf

More Giving Together: An Updated Study of the Continuing Growth and Powerful Impact of Giving Circles and Shared Giving. Report of the Forum of Regional Associations of Grantmakers, 2007

The First Charity: Why Philanthropy Must Make Democracy, by Robert Matthews Johnson. Seven Locks Press, 1998

Remaking America: How the Benevolent Traditions of Many Cultures Are Transforming Our National Life, by James A. Joseph. Jossey-Bass, 1995

Grassroots Philanthropy: Field Notes Of A Maverick Grantmaker, by Bill Somerville. Heyday Books, 2008.

Just Money: A Critique of Contemporary American Philanthropy, by H. Peter Karoff (editor). The Philanthropic Initiative, 2004.

A Hand Up: Black Philanthropy and Self-Help in America, by Emmett Carson. Washington, DC: Joint Center for Political and Economic Studies Press, 1993.

African American Philanthropy, produced by Council on Foundations. http://www.cof.org/files/Documents/Publications/Cultures_of_Caring/bibafam.pdf.

Short Changed: Foundation Giving and Communities of Color, by Applied Research Center, 2007 <http://www.arc.org/content/view/271/48/>

The Cost of Sticking Your Neck Out,” by Stuart Applebaum, Foundation News & Commentary, Sept/Oct 2005.

New Frontiers in Mission-Related Investing, by Luther M. Ragin, Jr., F.B. Heron Foundation, 2003. See http://www.fbheron.org/documents/ar.2003.viewbook_new_frontiers.pdf

Pathway 6: Fixing the Problem - Closing the Gaps in Racial Equity and Social Justice

The Challenge

The data are consistent: increasing [racial equity](#) and strengthening [social justice](#) remain challenges to our society. [Data consistently show disparities or gaps](#) in how well our society's systems and markets performs. Study after study shows how our public systems and private markets yield very different results for different racial and ethnic groups. Helping organizations address these disparities, producing more equitable results for all, is a legitimate goal for [philanthropy](#).

Barriers to progress include:

- These [gaps or disparities](#) are everywhere, in all walks of life, all regions of the country, and in all public systems and private markets that regulate good outcomes in these arenas:
 - Education
 - Income and Wealth Development
 - Housing, Infrastructure and Amenities
 - Health
 - Justice
 - Dignity and Respect
 - Civic Participation
- In our inquiries, we discovered several conditions that block progress, but which could be addressed by philanthropy. The astute reader of this website will note that these correspond to our six Pathways.
 - Too many [philanthropic organizations](#) (that is, their leadership) aren't well prepared or positioned to play a useful role.
 - The subject of justice and equity is inflamed by feelings of hurt, shame, or helplessness, such that too often it is ignored, resisted, or set aside as low priority.
 - Promising solutions that stand a chance of "moving the needle" if they saw the light of day and given the opportunity to gain support are instead allowed to wither on the vine.
 - The connections, networks, and leadership needed to bridge divides and move effective solutions to fruition aren't well enough supported.
 - Philanthropic resources directed to this issue are insufficient, given the magnitude of the challenge.
 - Maintaining one's philanthropic focus on disparities reduction requires strategy, discipline, and patience – all in short supply in the philanthropic community.
- There is too little grand vision, too little strategy, too little pursuit of useful change, and not enough respect for authentic evidence of authentic progress.

Fortunately, there are practices that address these barriers; investing in them, one at a time and in combination, is exactly what philanthropy can do to make a difference, to move the needle and level the playing field. Some gaps are more conducive to change than others. Good reconnaissance within the community will help you assess the potential for creating change.

Benchmark Practices. Progress is made when philanthropic organizations get good at these benchmark practices:

Choosing disparities that touch on your interests, discovering how they came to be and what maintains them, creating a plan to remedy the situation and pursuing it, staying focused on evidence of progress, and helping others learn from the experience.

- **Review.** Examine how your current mission effectiveness is affected by private markets and public systems that work unfairly, creating unequal outcomes for different groups.
- **Be strategic.** Good community reconnaissance, listening to a greater variety of resources, could put some promising ideas and solutions in play, and if supported by a growing base who see their self-interest in improving the data, and if backed by a variety of philanthropic resources – all of which can be lined up – could move the needle and bend the trend lines in the disparities data you choose to monitor.
- **Use a variety of lenses — rural, environmental, racial, cultural, geographic, gender – to develop a more comprehensive approach.** [PolicyLink](#) works to bridge the traditional divide between communities and policymaking at the local, regional, state, and national levels. It is developing the concept of “regional equity” and has developed a set of tools to “help reduce social and economic disparities among individuals, social groups, neighborhoods, and local jurisdictions across metropolitan regions.” [National Rural Funders Collaborative](#) supports “the reinvention of rural economies – ones with living wages, career ladder employment and jobs that respect the environment and the health and safety of employees – is fundamental to addressing extreme and persistent rural poverty and forging positive transformative change in rural America. NRFC understands that poverty is often a factor of race, class, culture, and power dynamics that are linked and concentrated.”
- **Make sure your plans, leadership roles, and guidelines help rather than hurt the chances of success.**

Applying a wide array of your resources and skills to the challenge of closing a gap in equity that you want to take on.

- **Create a culture of accountability and cooperation .**The [Jacksonville Community Council, Inc.](#), conducted intensive community-based studies of

conditions in Jacksonville and how to improve them. They now work to keep alive the good recommendations from the studies. The [South Carolina Association of Community Development Corporations](#) encourages its members to recognize their rights and their responsibilities to their communities, to step up and participate.

- **Work to change rules, increasing the opportunities for good outcomes.** The [Louisiana State University Foundation](#) changed the wording of its rules and regulations to positively affect 600 scholarship funds. [ERASE Racism](#) changed key provisions of Nassau County's fair housing ordinances. [Arkansas Advocates for Children and Families](#), working with a variety of other groups, wrote legislation that reduced the number of uninsured low-income children in the state. When the budget was cut, [Lee County Community Development Corporations](#), working in the Arkansas Delta, created new ways to offer education to its members. *Alaska Rural Community Health Economic Strategies* used new funding streams to create job positions and educational opportunities that support the viability of Native village life.
- **Add voice and influence.** Philanthropic organizations are, contrary to prejudgments of lawyers unfamiliar with IRS rules and regulations, allowed to be advocates for needed change to our social and community infrastructure, and they are allowed to support other philanthropic organizations in that work as well. That is, they can do almost all the things that a commercial entity or private individual can do, as long as the intent is to serve a public good rather than private gain. See more at [Alliance for Justice](#). A surprising variety of every-day activities make up the list of permissible acts of advocacy, including:
Philanthropic organizations can engage in advocacy; that is, they can do almost all the things that a commercial entity or private individual can do, as long as the intent is to serve a public good rather than private gain. This includes:
 - Bringing people together to discuss what they each might bring to the challenge of gap-reduction.
 - Introducing people to others who could conceivably be helpful.
 - Creating opportunities for others to step forward and do more.
 - Writing a check.
 - Giving encouragement to others.
 - Lending your name, your influence or your money to a gap-closing cause.

Creatively using the Pathways, as illustrated by the 2009 *Effies*® Award Winners.

The 2009 *Effies*® Social Justice Philanthropy Award, a philanthropy competition created by the [Effective Communities Project](#) honoring the effective use of philanthropic resources to make society's systems and markets work more fairly and effectively for all, was awarded to:

[Louisiana Disaster Recovery Foundation](#) – For raising awareness nationally to the unprecedented opportunity to transform the disaster caused by hurricanes Katrina and

Rita into a new Louisiana that ensures access and opportunity in rebuilding its communities and culture; for bringing together nonprofit leaders, community organizers, activists and advocates representing low-income communities across the Gulf Coast to re-engage them in our country's democratic processes in the earliest stages of post-storm recovery; for nurturing grassroots leadership and facilitating citizen-driven systems change to promote social justice and ameliorate generational disadvantage; and for creating a stronger base for a comprehensive approach to advocacy and distribution of funds for a full and just Gulf Coast recovery.

[Arkansas Public Policy Panel](#) – For helping distressed and marginalized rural communities turn their worries into goals, plans, legislative solutions, and campaign structures; for helping these communities understand and participate in the democratic process for their own benefit by forming critical relationships with elected and potential candidates for office; for helping them develop the organizational skills to mount their own neighborhood improvement and community development projects; and for supporting the interests and capabilities of dozens such communities through a statewide Arkansas Citizens First Congress in advancing a statewide legislative agenda to improve basic infrastructure such as safe water, educational and employment opportunities.

[Humboldt Area Foundation \(California\)](#) – For working to reverse the local marginalization of American Indians by adding Native cultural leaders and activists to its board, hiring Native staff, and prioritizing Native communities and projects in its grantmaking; for using its influence to bring Native representation to the table in a range of policy, planning, resource distribution, and leadership support contexts; for helping to create an enabling environment in which stolen Native land was returned, apologies offered, and sacred sites, customs, and language preserved; and for early and pivotal support for partnerships that brought in millions of dollars that directly support Native services and projects.

The 2009 *Effies*® Community Leadership Award, for effectively leading their community in implementing initiatives that address a pressing community opportunity or problem, was awarded to:

[Norfolk Foundation](#) – For leading its own organization first and its community second through a process of learning about the challenges faced by its children in starting kindergarten ready to succeed; for its convenings and trainings to mobilize support from civic and political leaders; for raising dollars from its board, existing donors, and beyond; for creating an organization that educates area residents, advocates for greater public and private investment, and encourages collaboration; and for creating a system for monitoring quality improvements made to individual preschools.

[Parkersburg Area Community Foundation](#) – For striving to build civic capacity and philanthropy in a small, rural, dispersed, economically distressed, and often forgotten

part of the country; for working to transform its organizational character into one that more fully embraces the broad spectrum of those it serves; for substantially increasing its grantmaking funds to combat persistent poverty; and for fostering stronger access to education and employment opportunities; and for creating rural networks for stimulating voluntarism, engagement, and resource development.

[Headwaters Fund for Social Justice](#)– For mobilizing a group of Minnesota foundations, donors and activists to address inequalities in the electoral system in follow-up to the 2000 Presidential elections. With a goal “to increase participation and political power of disenfranchised groups,” the specially created Democracy! Fund made grants to increase civic engagement, support public policy and advocacy, and build political power in disenfranchised communities.

The 2009 *Effies*© Community Advocate Award, for effective persistence in providing a necessary voice for constructive change, was awarded to:

[Families and Friends of Louisiana’s Incarcerated Children](#) – For drawing attention to Louisiana’s “school to prison pipeline” and to the plight of those left behind in the two-tiered and racially divided New Orleans public school system; for supporting the passage of a statewide school discipline plan for Louisiana’s schools that includes evidence-supported efforts for keeping kids in school by using alternatives to suspensions and expulsions (which push children onto a criminalized path toward failure); and for advocating for parents and children by insisting on accountability for the plan’s implementation.

[Brett Family Foundation](#) – For undertaking a statewide listening tour to create relationships of trust and discovery of opportunities and challenges that this new Colorado foundation could address; for choosing to invest in opportunities to provide greater voice in the civic arena for people of color, people with limited socio-economic opportunities, and LGBTQ persons; for supporting several “organizing collaboratives” to provide safe space for discussing challenging issues; and for supporting organizations that allow their constituent communities to identify problems and seek solutions.

Working on *all* the pathways, especially in combination, to stay focused on the challenge of gap-reduction. Below are examples of some productive combinations.

- **Relationships and Networks + Solutions** / To create a program of Individual Development Accounts in the state of Arkansas, the [Southern Good Faith Fund](#) helped write legislation drawing on ideas surfaced from numerous community discussions. They then helped pass the legislation, drawing on the power of numerous networks of vested stakeholders convened by *Arkansas Advocates for Children and Families*. Elsewhere, the [National Rural Funders Collaborative](#), a network of national and regional funders working with a collection of smaller

- organizations, has helped through its convening and direct assistance to bring forward several policies to legislative and executive deliberation.
- **Organizational Preparation + Resources** / The [Community Foundation in Jacksonville](#) (Florida) saw an opportunity, given the timing of events in the city, to create the “Quality Education for All” initiative. It allocated two-thirds of its unrestricted grantmaking budget annually for at least 10 years to the project, and provided leadership in both the private and public sectors. The board combined its historic donor-focus with a community leadership role. Wanting to add value more intentionally to the community, the foundation diversified its board, and gained a presence at more conversations in the community. The [Twenty-First Century Foundation](#) created a special initiative to attract attention and energy to the plight of African American men and boys. [Hamilton Community Foundation](#) focused on poverty reduction, neighborhood development and youth engagement.
 - **Resources + Solutions** / [Winthrop Rockefeller Foundation](#) has worked to create an economy in which African Americans can participate, by making several grants to improve science, technology, engineering and math education in all schools, additionally targeting middle and high schools with high African American enrollment. [Appalachian Ohio Regional Investment Coalition](#) used local arts and crafts to create opportunities for community economic development. [Alaska Rural Community Health Economic Strategies](#) created and extended health field career ladders in Alaskan native villages. This helped to stimulate the local economies, increase the standard of living and allow elders to stay healthier and remain longer in their villages. The [Community Foundation of Ottawa](#) created a loan fund to assist low-income entrepreneurs.
 - **Organizational Preparation + Building Trust + Solutions + Networks&Leadership + Philanthropic Resources** / [The Council on Crime and Justice](#), a Minnesota nonprofit under the leadership of a former City Attorney, got support for its Racial Disparity Initiative and Call to Justice from federal and state agencies, Minnesota private, corporate, and community foundations, as well as many of the Twin Cities’ most prominent law firms and individuals to “reduce racial disparity and enhance public safety in Minnesota’s justice system,” resulting in moving specific solutions through the implementation pipeline, and a CLE course for the state’s legal profession.
 - **The more all these different Pathways to Progress can be engaged, the more likely the progress towards social justice and racial equity – our central thesis. See our various [Articles and Tools](#) for elaboration.**

Signs of Progress. Philanthropy gets high marks for progress achieved on this pathway when you can see signs that...

- More philanthropic organizations are better prepared or positioned to play a useful role.

- The subject of justice and equity is more readily discussed, with diminished feelings of hurt, anger, shame, or helplessness.
- Promising solutions that stand a chance of “moving the needle” are more likely to see the light of day and given the opportunity to gain support.
- The connections, networks, and leadership needed to bridge divides and move effective solutions to fruition are better supported and increasingly effective.
- Philanthropic resources directed to this issue are increasing.
- Maintaining one’s philanthropic focus on disparities reduction requires strategy, discipline, and patience – all in greater supply in the philanthropic community.

Resources

The Foundation Review. The Peer-Reviewed Journal of Philanthropy, published quarterly from The Dorothy A. Johnson Center for Philanthropy and Nonprofit Leadership at Grand Valley State University. Their mission: to share evaluation results, tools, and knowledge about the philanthropic sector in order to improve the practice of grantmaking, yielding greater impact and innovation.

State of the South 2007 calls upon the region’s philanthropic organizations to think more creatively and act more boldly to help the South address its self-limiting inequities and spur its competitiveness in a global economy. MDC, Inc. *State of the South 2004* examines the region’s economic and demographic landscape and how Southerners are faring within it. MDC, Inc.

Grantmaking With A Racial Equity Lens. Available from Grant Craft, www.grantcraft.org

Three articles by Steven E. Mayer, downloadable from this site. *Choosing Promising Ideas and Proposals: A Tool For Giving That Closes The Gaps; Gaps in Racial Equity, and Strategies for Reducing Them; Saving the Babies: A Clash in Philanthropic Approaches*.

Building Community Capacity: The Potential of Community Foundations, by Steven E. Mayer, available from Rainbow Research, Inc.