

# Diversity, Equity and Inclusion (DEI) Accelerate Community

## Session II Philanthropic Giving and Grantmaking with a Lens of Equity

January 28, 2020

Session recording:

<https://www.youtube.com/watch?v=E11-P-XyUO4&feature=youtu.be>



# Today's Facilitator

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# **Session I: Summary Diversity, Equity and Inclusion (DEI) Accelerate Community**

January 28, 2020



# Participating Companies

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Monica Council-Miles,  
Manger, Volunteerism & Grants  
Social Investments Department

Johnel Evans, Vice President  
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DB





# Session 1Recap



# Topics Discussed

- The impact of DEI on corporate citizenship and philanthropic giving.
- What is corporate citizenship equity?
- Embedding equity in the company DNA.
- Story telling – how have you been impacted by being the “only one”.



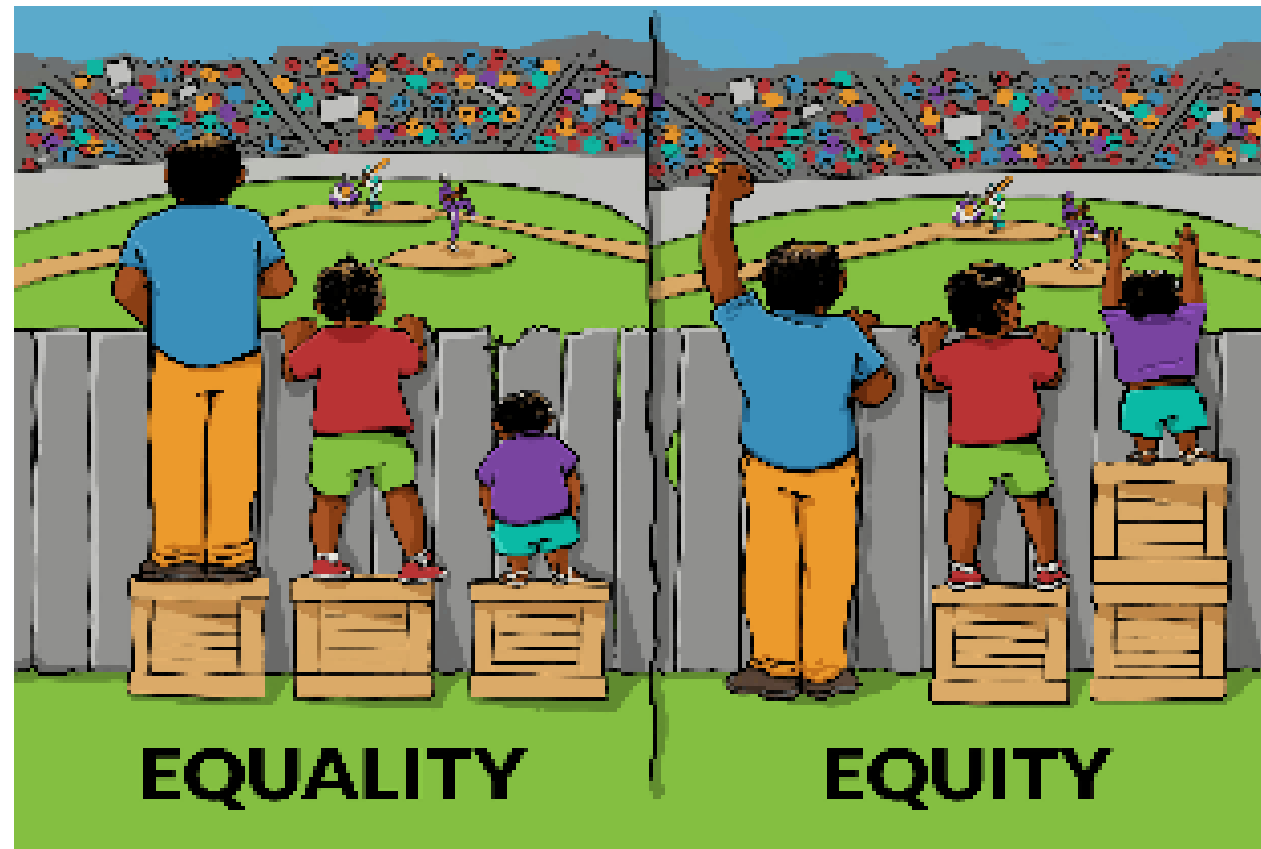


# Improve DEI in philanthropy

- Re-define risk
  - Grassroots does not mean small, it can be big and impactful
- Emphasize trust
  - Companies/philanthropist must shift from gatekeepers to allies
- Reflect the community
  - How diverse are the organization's teams and portfolios
- Disrupt comfort
  - It's ineffective to ensure the comfort of white people



# Equity exercise





# How can companies ensure equity practices?

- Start with systems, not individual responsibility
- Redefine risk
- Understand that not every space is for everyone
- Build and emphasize trust
- Use power and privilege to challenge bias
- Reflect the community
- Collaborate, do not dominate
- Re-evaluate words and images
- Say no, so others can have an opportunity to say yes





# **Session II**

## **Philanthropic Giving and Grantmaking with a Lens of Equity**





“If you don’t understand the barriers, both historic and current,  
a neighborhood faces on a daily basis,  
it’s difficult to serve those neighborhoods effectively,”

Sidney Hargro, President,  
Philanthropy Network Greater Philadelphia



The background is a solid blue color. Overlaid on this are several concentric circles and a central spiral pattern, all in a lighter shade of blue. The circles are of varying sizes and are positioned such that they overlap each other. The spiral is located in the center-right area of the image.

# Equity in Giving



# The equity lens

- An equity framework is a proactive, strategic approach to improving outcomes that accounts for structural differences in opportunities, burdens, and needs in order to advance targeted solutions that fulfill the promise of true equality for all.
- Achieved when you can no longer predict an advantage or disadvantage based on race, ethnicity, gender, gender identity, sexual orientation or ability.



# The goal of equity

- Funders look at philanthropy as a way to solve problems rather than providing funds to support people facing these problems.
- Create sustainable change.





# The issues faced by grantees

What are some of the issues you've heard grantees face during the application, execution and reporting processes?



# Barriers to equity

- Systemic and structural issues in the process
  - Funders are often limited by their own rules, regulations, and definitions.
  - Reporting requirements
- No or little experience of applicant
  - So how do you get experience without having experience?
- The usual suspects
  - Funders need to find ways to expand their reach beyond their usual networks



# Barriers to equity

- Talent pipeline
  - The proportion of philanthropic positions held by underrepresented groups remains low.
- Power and privilege
  - Little public oversight and not accountable to any other constituency
  - Invisible culture and privilege inform how a foundation decides what is “normal,” “good,” “effective” or “risky.”
- Veil of protection
  - Grantees and communities are more likely to be judged for “failures”



# Philanthropic sectors to consider



Fair  
Considerations



Aligned  
Investments



Open  
Mindset



Shared  
Language



Transparent  
Orientation



Active  
Advocate



Informed  
Selection  
Process



Reinforced  
Programs



Courageous  
Leadership



Evaluative  
Discipline



Dedicated  
Oversight



Engaged  
Collaborator

The 12 Dimensions, Equity Maturity model





We have the challenge of trying to figure out how to leverage the resources – the small resources that we’ve got – to have the biggest possible effect. ... And that leads you to think:

It’s not just about the money.

It’s about other assets that we can invest; reputation, convening power, knowledge, capacity-building and risk. Sometimes, if you want to create major change, you have to take extra risk to do it. We’ve been trying to think about our risk posture in a 360-degree way that looks at all those factors.”

– Stephen Heintz , *President, Rockefeller Brothers Fund*



# The impact when bias is in the process

- Lack of knowledge about the communities served.
- The wrong decision makers at the table.
- Limited viewpoints, important consideration are missed.
- Wrong data measurements, insights and quality
- Value misalignment



# How to address built-in bias in philanthropic giving and grant making efforts?

- Ask smart challenging questions:
  - Does your grantmaking prioritize benefit for under-resourced and marginalized communities?
  - Does your stated or implied values align with equity?
  - Has your organization committed to advancing equity for priority issues or communities?
  - Has your board and staff leadership embraced systemic change as a grantmaking goal or strategy?
  - What steps have you taken to integrate principles and practices of diversity, equity and inclusion (DEI) into its internal operations?
  - Has your organization examined its power and privilege as grant makers in relation to the nonprofit and communities it supports?
  - How often do you convene meetings to engage with the grantees?
    - What are the outcomes of those meetings? Who attends? How successful was the meeting?
  - How inclusive and accessible is your leadership and organization to the grantees?
  - What the one most important thing the foundation could do to improve the connections between your organization and the grantees?



# Insights from the CSE white paper



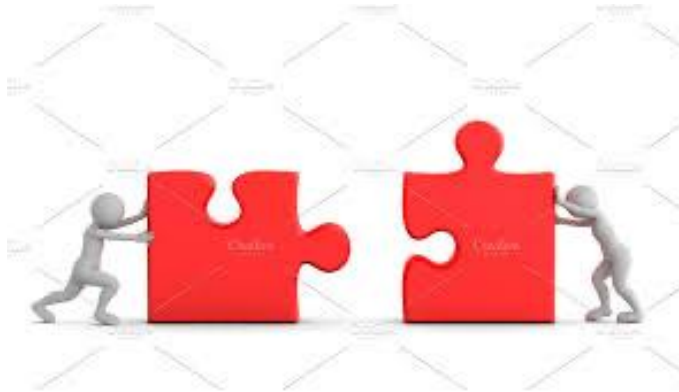
# Insights from the CSE white paper





# Creating Meaningful Partnerships





How does your company  
develop meaningful  
connections and partnership  
with grantees?



# Tips to create meaningful partnerships

- Removed support restrictions
  - allow unrestricted support and advocate for more general operating support
- Personally invest in your grantees
  - The human touch can make a big difference without taking up much extra time.
- Create purpose driven contact with grantees
  - reach out more frequently to offer encouragement and support, introduce resources, or just check in so that the communication burden doesn't always fall on the grantees.
- Make it as easy as possible for your grantees
  - Working at a nonprofit can often be quite stressful, and program officers must respect that and be careful about placing any undue burdens on grantee partners that take up valuable time and energy. Seek capacity-building opportunities for grantees



# Tips to create meaningful partnerships

- Make it as easy as possible for your grantees
  - Working at a nonprofit can often be quite stressful, and program officers must respect that and be careful about placing any undue burdens on grantee partners that take up valuable time and energy. Seek capacity-building opportunities for grantees
- Extend network opportunities
  - Introduce grantees to other funders



# Incorporating equity in the philanthropic giving and grantmaking process

- See handout
  - “Incorporating Diversity, Equity, and Inclusion in Your Grant-Making Process: A List of Potential Actions”. By Arabella Advisors: A **checklist** that grant-making organizations can use to incorporate DEI into their grant making.



# Identify an equitable proposition value?

- Does your process ask what is needed
  - Are grantees making their needs fit your requirements?
- Gain valuable insights to understand the communities need and align your company's "why" for a mutual proposition value.
  - Examples:
    - food drive vs. sustainable community gardens
    - New parent training vs. mommy mentoring programs
    - Money vouchers vs. financial literacy/budgeting skills
    - Skills training classes vs. on the job shadowing programs



How are your employees  
educated about equity and the  
process as they serve in the  
communities ?





# Create an equity policy statement for volunteerism



- Who
- What
- When
- Why
- Definitions





# Examining Giving Behaviors



# What are key decision points of the philanthropic process?

- Resourcing: buy or build
- Decision Making: centralized or decentralized
- Initiative: proactive or responsive
- Flexibility: creative or disciplined
- Programming: broad or deep
- Relationships: networked or independent





**Insight from 3M**



# Jacqueline Berry



Jacqueline Berry manages 3M's education strategy and investments. Prior to joining the 3Mgives team, Jackie was a public relations manager for the company. She began her career with 3M as a government relations manager in the Washington, DC office. Before joining 3M, Jackie was also a legislative assistant to a U.S. Senator and was a Presidential Management Intern with the Equal Employment Opportunity Commission in Washington.

Jackie has a B.A. in History from Millsaps College in Jackson, MS and her master's degree in public policy from Jackson State University also in Jackson, MS.





# Best Practices



# Strategies to mitigate bias

- Doubt objectivity
- Increase motivation to be equitable
- Improve conditions of decision-making
- Count, data driven
- Monitor and improve the environment
- Collect data and monitor outcomes
- Involve a cross-section of decision-makers
- Create institutional mechanisms to reduce bias
- Affirmatively state and pursue inclusive outcomes.



# Recommendations to embed equity

- Re-evaluate risk tolerance
- Make the application process less cumbersome and more accommodating.
- Consider awarding grants/giving for capacity building
- Expand the channels for identifying applicants.
- Be radical
  - Consider compensating certain applicants/grantees
  - Have open calls to answer questions and engage with applicants/grantees
  - Perform site visits before the application process opens to engage with communities and those receiving services.
  - Establish advisory committees from surrounding communities





**In Summary**





*“Grants are one important strategy for increasing prosperity and educational attainment and strengthening communities and nonprofits in Arkansas. But they aren’t our only strategy. To move the needle, WRF staff also serve as ambassadors, advocates and activists for a shared vision of progress-- and we motivate others to be leaders as well.”*

*Sherece Y West-Scantlebury,  
President & CEO, The Wintrop Rockefeller Foundation*



# Accountability

- What areas of your giving process will you look to reduce built-in bias?
- How can you ensure your employees understand your equity policy and goals?
- What can you do to help with capacity building with grantees you partner with?



# Closing remarks





**Thank You**