



UNITED PHILANTHROPY
FORUM

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**SOUTHEASTERN
COUNCIL OF FOUNDATIONS:**
**An Experiential
Racial Equity
Journey**

December 2020

Acknowledgements

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Development of this case study was made possible in part thanks to support from Borealis Philanthropy and its Racial Equity in Philanthropy Fund.

ABOUT THE FORUM

As the largest and most diverse network in American philanthropy, United Philanthropy Forum holds a unique position in the social sector to help increase philanthropy's impact in communities across the country. We are a membership network of nearly 90 regional and national philanthropy-serving organizations (PSOs), representing more than 7,000 funders, who work to make philanthropy better. The Forum envisions a courageous philanthropic sector that catalyzes a just and equitable society where all can participate and prosper.

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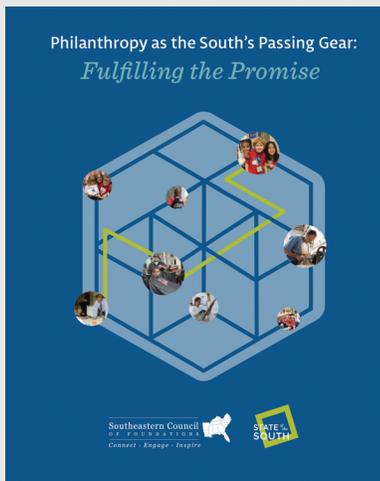
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Executive Summary

In early 2018, the Southeastern Council of Foundations (SECF) along with its board undertook a racial equity learning journey in order to develop an Equity Framework that would describe and define SECF's character, what it stood for, and what its leaders were willing to fight for. The decision to develop the Equity Framework was the culmination of years of work that began in 2011 with the hiring of Janine Lee, the first female, and first African American to serve as CEO.



The SECF board commissioned the report *Philanthropy as the South's Passing Gear: Fulfilling the Promise* to ensure that the Equity Framework would be informed by data

In 2017, following a period of diversifying the board, staff and membership, Lee felt that SECF was ready to begin conversations about what it stood for as an organization and what it was willing to fight for, particularly during a critical time in history with increasing division and episodes of racism. These conversations led the board to decide to develop an Equity Framework. Additionally, the board commissioned the report [*Philanthropy as the South's Passing Gear: Fulfilling the Promise*](#) in order to ensure that the Framework would be informed by data. The data from the report indicated the racial disparities in education, health, economic, and other outcomes that were prevalent in the region despite years of funding. Subsequently in 2018, SECF began engaging members in conversation through interviews and site visits as well as surveys, to understand what members felt SECF should be undertaking, and through these conversations it was apparent that members were interested in addressing inequities in the South.

With a more diverse board and staff in place, data indicating systemic inequities, and a clearly stated desire from SECF members for support in addressing these root causes of inequity, SECF felt ready to begin the process of creating the Equity Framework.

At the outset, Lee and SECF board leaders recognized that to develop the Equity Framework and provide the type of leadership that members were seeking, the board and staff would need to undertake a racial equity learning journey together and be well-versed on the topic of equity and its key concepts. The board and staff began with a series of quarterly meetings in 2018 that included hearing from speakers, reading articles, bringing in various processes into the board room, and undertaking site visits to historical sites to explore the history of racial inequality in the South. It was an emotional journey for both the board and staff.

Once the board and staff felt ready, the next step was the creation of an Equity Task Force to lead the effort of developing a Framework. The Task Force was an interracial group comprised of several board members, who represent various foundation members, and Lee. This was a significant development indicating the strong commitment of leadership to undertake this journey. Similar to the learning journey undertaken by the board and staff, the Equity Task Force began a learning journey to understand the racial history of the South, as well as current issues facing communities in the Southeast, in an effort to build a framework for SECF members.

The site visits that the Task Force undertook provided members with an opportunity for an equity immersion that allowed them to hear from local communities and comprehend how inequity is manifested in the South, as well as identify the issues that foundations should address in their philanthropy. The experience made Task Force members more determined to create a Framework that focused on a broad swath of SECF's membership by ensuring that no matter where members were on their racial equity journey, the Equity Framework would offer something for them to learn and grow and open up more opportunities for the people in their communities.

Given the depth of its membership, it was important for SECF that the Framework and its definition of equity be inclusive of as many marginalized groups as possible with the understanding that race was at the center of this definition, given the history of Southern inequality.

In November of 2019, at SECF's 50th Annual Meeting, the [Equity Framework](#) was revealed for the first time. The goal of providing opportunities for all SECF members to grow and learn, no matter where they were on their own racial equity journey, was reflected in the programming components of the Equity Framework. Additionally, the Framework includes organizational commitments to reflect SECF's values internally.

In its equity framework, SECF has committed to integrating a focus on equity within its organizational culture, systems, guiding principles, and programming.

After sharing the Equity Framework with its members, who were overwhelmingly positive in their response, SECF began to implement various components in early 2020. Though the onset of the COVID-19 pandemic could not have been anticipated, SECF leadership felt extremely well-positioned to respond to the crisis as well as the growing Black Lives Matter movement (BLM), reignited after George Floyd's death. All the time, effort, and work that had been spent on developing the Framework better positioned SECF to be a resource and guide to its members. Through their racial equity learning journey, SECF's leadership and staff had undertaken the planning necessary to be ready and responsive.

SECF has seen a growing increase in members' interest and commitment to engage in racial equity work. Some members have called the pandemic a "waking moment" that revealed the depth of inequity and how it pervades so many aspects of everyday life. Whether conservative or progressive, these members are interested in learning and engaging.

In its Equity Framework, SECF has committed to integrating a focus on equity within its organizational culture, systems, guiding principles, and programming. To guide the implementation of the Framework internally and ensure that it is reflected in every aspect of the work, the board approved converting the Equity Task Force to a standing Equity Committee that has begun to meet regularly. Committee members and board members have begun to identify priorities and goals for the next strategic plan for 2021-2025. While the staff and board are in the early stages of their internal work, SECF plans to continue to infuse

this commitment to racial equity within every aspect of the organization including its overall operations, administration, talent management, hiring practices, culture, mission, and vision.

Though SECF has been in existence for 50 years and has been working on racial equity issues for almost a decade, according to Lee its racial equity journey has been a slow and incremental process. It took nearly 10 years from her arrival at SECF to get to the point of creating an Equity Framework, though this does not diminish the amount of time, effort, conversation, and training that has gone into getting to this point. While Lee celebrates progress made so far, she believes SECF is still in the very early stages of its journey. However, she believes the organization's deep commitment and plans to infuse racial equity within every aspect of the organization demonstrate that this has become part of SECF's DNA.

FUTURE GOALS

SECF's leadership identified the following future goals:

- **Ensure that SECF is “walking its talk”**- Organization leaders want to ensure that SECF is demonstrating leadership around racial equity. This includes how SECF engages with people and the culture of the organization.
- **Share learning with members**- Once they have done the work internally to build policies, processes, and practices, they want to be able to share that learning with SECF members to guide them around what they need to be doing within their organizations, as well as with their grantmaking.
- **Promote equitable grantmaking**- Through the provision of data, SECF wants members to understand why it is critical to walk the talk of equitable grantmaking and recognize that giving grants to the same organizations every year without addressing systemic issues will not lead to fundamental changes in communities.
- **Support trustee development and education**- SECF wants to support trustee development and education and wants foundations to realize that they have to diversify their boards and be reflective of the communities that they serve.
- **Help members understand the history of the region**- SECF wants to help members understand the history of the region that they live in as these kinds of experiences can be transformative.

While the current movement provides a momentous opportunity for PSOs that are beginning a racial equity journey, the journey does not end. It is essential to constantly reassess and reevaluate.

REFLECTIONS ON THE JOURNEY

SECF leadership shared the following reflections:

- Taking the temperature of the membership prior to beginning a racial equity journey to determine where they are and what they are looking for is important to establishing momentum from the start and demonstrating that there is a strong desire for a focus on racial equity.
- Being intentional about how the learning journey is implemented and taking steps along the way to ensure that members are supportive and aware of the process as it is unfolding is critical to ensuring that members embrace the changes and that there is buy-in.
- Putting a Framework in place, and adopting the definition, language, culture, and internal changes it calls for is not possible without partners who are open and willing to help support the organization as it moves forward.
- Finding a balance between how much to lead versus how much to let members lead, as a membership association, is a challenge and there are risks associated with being too progressive and having members leave as well as with not being progressive enough and losing members.
- Recognizing that it takes members of all kinds to change what is happening in America and across the South is critical. People have to be willing to listen to each other and see the value in all humanity in order to take the time to listen. The challenge is figuring out how to build bridges because there is a need for more allies.
- Understanding that while the current movement provides a momentous opportunity for PSOs that are beginning a racial equity journey, the journey does not end. It is essential to constantly reassess and reevaluate.

Case Story

INTRODUCTION

The Southeastern Council of Foundations (SECF) was founded in 1969 in response to efforts by legislators to limit or dissolve the growth of philanthropic institutions. Today SECF is a membership association of approximately 350 grantmakers working to strengthen, promote, and increase philanthropy in 11 Southeastern states. The mission of SECF is: *“To serve, connect, strengthen, and champion philanthropy and philanthropic infrastructure in the South.”*

In 2011, SECF hired Janine Lee, the first female, and first African American, to serve as CEO. This selection represented a significant moment for the organization and was indicative of the SECF board’s interest in increasing diversity in the organization.

In early 2018, SECF began an equity learning journey with its board and staff after the board approved a plan to develop an Equity Framework. The decision to develop the Equity Framework was the culmination of years of work that began in 2011 with the hiring of Lee. When Lee joined SECF, the board and search committee members had expressed interest in wanting the organization to remain relevant and to think in innovative ways about a path for the future. They recognized that the organization had historically served foundations that were mostly conservative and white-led. Lee saw this as an opportunity to begin diversifying the membership. This led to years of change that included identifying new board members, diversifying SECF’s staff, and making recommendations around diversifying the membership. Eventually, SECF began to see new leaders emerging and increasing diversity within various member foundations. It was at this point that Lee felt SECF was ready to begin conversations about what it stood for as an organization and what it was willing to fight for.

Externally, beginning in 2015 a series of violent attacks motivated by race and other forms of bigotry also influenced this desire to engage in these conversations. These included the Mother Emanuel African Methodist Episcopal Church shooting that took place in Charleston in 2015; the Pulse Nightclub shooting that took place in Orlando in 2016; and the Charlottesville Unite the Right rally and subsequent violence in 2017. After each event SECF found itself responding with “typical thoughts and prayers statements” and recognized that this was an inadequate response to the situation.

In 2017, Lee began posing questions to the board about what it stood for as an organization given SECF’s 50-year history and its location in a region, the Southeast, with numerous disparities and inequities. She wanted board members to reflect on what it meant if they chose to do nothing during this critical time in history with increasing division and episodes of racism. The questions she posed led the board to decide to develop an Equity Framework that would describe and define SECF’s character, what it stands for, what its leaders are willing to fight for, and to put this in a historical context.

The next step was to encourage the board to support the commissioning of the report [Philanthropy as the South's Passing Gear: Fulfilling the Promise](#), which was produced in partnership with [MDC](#). SECF wanted to ensure that as it moved forward with developing an Equity Framework that it would be informed by data. The data from the report clearly illustrated the racial disparities in education, health, economic, and other outcomes that were prevalent in the region despite years of funding. SECF recognized that these racial disparities were the result of systemic inequity and represented a significant obstacle to philanthropic efforts. It wanted the report to help foundations recognize the history of inequities and disparities in the South, and to serve as both a benchmark around current conditions in the South and a roadmap for the future. Around this time, SECF also supported the creation of the book [The Liberating Promise of Philanthropy: Stories of Grant-Makers in the South](#), by Martin Lefheldt, one of Lee's predecessors, and Jamil Zainaldin. The book provided a historical perspective about how grantmaking foundations have shaped and been shaped by the South and included the story of SECF's emergence.

Following these steps, SECF began engaging members in conversation through interviews and site visits as well as surveys, to understand how members felt about where the organization was and what it should be undertaking. Through these conversations, it was apparent that members were interested in addressing inequities in the South. Members felt they could use the data from the Passing Gear report to make a case to their board and trustees, as well as the broader community, about the importance of addressing disparities. This growing interest among its membership in addressing equity was also apparent in SECF's 2018 member survey, in which 61% of respondents reported making an effort to advance diversity, equity, and inclusion (DEI), and expressed a desire to do more.¹ Many members were looking to SECF for help around equity issues. Furthermore, sessions on DEI were some of the most attended at SECF's 2018 annual conference, reinforcing the support among its membership for pursuing an equity focus.

With a more diverse board and staff in place, data indicating systemic inequities, and a clearly stated desire from SECF members for support in addressing these root causes of inequity, SECF felt ready to begin the process of creating the Equity Framework. The goal of the Equity Framework was to provide a foundation for SECF's work moving forward and to enhance its members' ability to influence improvements in the South that would dramatically reduce inequities.

SECF officially revealed the Equity Framework at its 50th Annual Meeting in 2019. The purpose of adopting an equity focus was clearly articulated in the Framework stating: ***"SECF's research and that of many others, has revealed the Southeast still suffers from distressing disparities in health, food security, income, and education, lifespan, economic stability, and other indicators of well-being. The reason for this is clear: Systemic inequity still exists in our region and presents a significant obstacle to philanthropy making a real lasting impact."***

¹ See [2018 SECF Member Survey: Key Findings Report](#)

THE JOURNEY TO CREATE AN EQUITY FRAMEWORK

While SECF initially had a much faster timeline in mind for developing the Equity Framework, some early internal discussions provided staff with the insight that they would need to undertake a more deliberate and thoughtful process. As a result, the board and staff undertook a two-year experiential learning journey.

At the outset, Lee and SECF board leaders recognized that to develop the Equity Framework and provide the type of leadership that members were seeking, the board and staff would need to undertake a racial equity learning journey together and be well-versed on the topic of equity and its key concepts. The board and staff began with a series of quarterly meetings in 2018 that included hearing from speakers, reading articles, bringing various processes into the board room, and undertaking site visits.

The first meeting in February of 2018 was facilitated by Dr. Robin Hindsman Stacia, the founder of [Sage Consulting Network](#), whose expertise includes organizational management, and organizational diversity and inclusion. In May of that year, the board met with Glenn Harris, President of [Race Forward](#), in Columbus, Georgia. Race Forward works in partnership with communities, organizations, and sectors to build strategies to advance racial justice. This meeting was followed by a trip to Montgomery, Alabama, to visit the National Memorial for Peace & Justice, dedicated to the victims of lynching, and The Legacy Museum. The Legacy Museum is built on the site of a former warehouse where enslaved African Americans were imprisoned and explores the history of racial inequality and its relationship to a range of contemporary issues such as mass incarceration and police violence. Subsequently, in September, SECF's board meeting was followed by an event titled Breaking Through Barriers that brought together regional and national funders to discuss ways to further equity in the South through increased investment from national funders and to explore how to build effective relationships in the South between national and local funders and the communities they serve. The first part of the event focused on SECF's board and was facilitated by Milano Harden, President of [The Genius Group](#), which focuses on organizational change and diversity and inclusion.

In reflecting on this initial learning journey, Lee shared that it was hard work and it was an emotional journey for many of them. However, she was not willing to move forward with creating the Framework until she had a consensus from the board to indicate that it was ready to begin the process. Once they had consensus and the staff felt ready, the next step was the creation of an Equity Task Force to lead the effort of developing a Framework. The Task Force was comprised of several board members, who represent various foundation members, and Lee. Importantly, it was an interracial group, made up of black and white trustees. This was a significant development indicating the strong commitment of leadership to undertake this journey. Additionally, the inclusion of board members in the Task Force was important because SECF viewed the board as a microcosm of its full membership, and this would allow the opportunity to assess the Framework before it was shared with the full membership. Similar to the learning journey undertaken by the board and staff, the Equity Task Force began a learning journey to understand the racial history of the South, as well as current issues facing communities in the Southeast, while bravely discussing and facing

race in new ways, all in an effort to build a framework for SECF members. In many ways, the Task Force became yet another microcosm of the SECF membership as an equity facing and focused group of Southern leaders, learning and growing and linking personal and professional values.

The Equity Task Force held its first meeting in November 2018 at the SECF Annual Meeting in Louisville. The primary purpose of this meeting was to engage in an introductory discussion about the Task Force's work for the year ahead. After this preliminary meeting, the Task Force met in early 2019 and invited Dr. David Maurrasse, President of [Marga Incorporated](#), to provide a briefing on a [research study](#) Marga Inc. conducted for [United Philanthropy Forum](#) on current work that Philanthropic Serving Organizations (PSOs) were undertaking to advance racial equity in philanthropy as well as their future needs. Additionally, the Task Force wanted to hear about what other foundations were doing around advancing racial equity. A major outcome of this meeting was agreement on a Vision and Mission for the Task Force.

The meeting was held in Charleston, South Carolina, where the Task Force met with staff at the [Coastal Community Foundation](#) and received a tour of Marion Square where they viewed a statue of John C. Calhoun, an American statesman and a fervent defender of slavery. That statue has recently been removed in the wake of the George Floyd murder and Black Lives Matter (BLM) protests. The Task Force also stopped at the Mother Emanuel Church and received an extended tour of Gadsden's Wharf, which was the first destination for an estimated 100,000 enslaved West Africans between 1783 and 1808. An International African American Museum is also being built on Gadsden's Wharf.

They recognized that much of what they hoped to change is embedded in the ability to influence policy

One of the topics of discussion that emerged during these site visits was around monuments and what these evoked for members of the Task Force. This led to an acknowledgment that given SECF's location in the South, a region dominated by conservative governments and led by policymakers steeped in Southern traditions, they would need to reckon with issues of ideology. They recognized that much of what they hoped to change is embedded in the ability to influence policy, so they could not "sing to one choir." They would not create change by only speaking to progressive members. As a result, one of the key parts of the discussion focused on how to bring all voices to the table and how to influence leaders within the South to make the kind of change that would improve the quality of life for children, families, and communities. Task Force members were determined not to leave anyone behind and realized that their strategy had to be one that was embracing of different points of view while influencing thinking as much as possible and keeping everybody moving toward a desire to see more equity in the region. While they recognized that they may lose some people, they felt it was important to be thoughtful and measured in how they crafted the Framework.

In April of 2019, the Task Force met in Jackson, Mississippi. At the meeting, Maurrasse

reviewed definitions of key terms related to equity and racial equity with the Task Force before members engaged in small group discussions to begin to develop their definition of equity and the elements of the Framework itself. Following the meeting, the Task Force toured the Mississippi Civil Rights Museum and spoke with Jane Alexander, the President & CEO of the [Community Foundation for Mississippi](#). They then took a guided bus tour of the Mississippi Delta before arriving in Memphis, Tennessee. Once there they spoke with two leaders of the [Community Foundation of Greater Memphis](#), President Bob Fockler and Board Chair Terri Lee Freeman, and toured the National Civil Rights Museum.

Lee shared that there were a lot of emotional moments at the April 19 Task Force meeting – it was a powerful discussion because members began to draw on their learning and consider their definition of equity. They were also learning about how other groups – locally, nationally, and regionally – were defining equity and racial equity so that the Task Force could inform the development of its own definition. Given the depth of its membership, it was important for SECF that the Framework be inclusive of as many marginalized groups as possible. Additionally, they were hearing from communities about misogyny, xenophobia, challenges for LGBTQ communities, as well as racism facing African Americans, Latinx, and other communities of color across the South. SECF wanted its definition of equity to be as inclusive as possible with the understanding that race was at the center of this definition, given the history of Southern inequality.

The Task Force revealed the complexities of this issue: On one hand, they are fighting against ignorance about the realities of systemic racism but on the other, they are fighting against racism itself – if people don't believe that someone should have a better quality of life, it is very difficult to create change.

The site visits that the Task Force undertook provided members with an opportunity for an equity immersion that allowed them to hear from local communities and comprehend how inequity is manifested in the South, as well as identify the issues that foundations should address in their philanthropy. In reflecting on the process and why it was essential for developing the Framework, Lee noted, “As Bryan Stevenson says, it’s always important to get proximate.” For SECF, being a PSO that works predominantly with foundations that are in relationship with their communities, it was important for the board, staff, and the Equity Task Force to get closer to the people in these communities, as well as to community leaders. Given that SECF has a broad and diverse group of leaders from across the South, its leaders wanted to ensure that Task Force members had the experience of literally traveling to different places in the South that they may not have previously visited. It was an opportunity to speak with people in the community and to understand the historic roots and current realities of racial inequities in the South. They were struck by what they heard regarding how people feel today in some parts of Mississippi. They learned that some people in those communities were perfectly aware of the inequities that existed, particularly for African Americans, but were comfortable with these outcomes because they not only blamed

families or individuals for the inequities they experienced but also, in some cases, were angry with them for being in that position. It revealed the complexities of this issue: On one hand, they are fighting against ignorance about the realities of systemic racism but on the other, they are fighting against racism itself – if people don’t believe that someone should have a better quality of life, it is very difficult to create change.

However, the experience made Task Force members more determined to create a Framework that focused on a broad swath of SECF’s membership by ensuring that no matter where members were on their racial equity journey, the Equity Framework would offer something for them to learn and grow and open up more opportunities for the people in their communities.

After completing the site visits, the Task Force engaged Maurrasse to develop the Framework in consultation with Lee and the co-chairs of the Equity Task Force. The Framework was eventually shared with the board at a meeting in Montgomery, Alabama, where it was approved.

“I believe in the promise of philanthropy and its transformative power in the lives of communities and families.”

Janine Lee
CEO, Southeastern Council of Foundations

In November of 2019, at SECF’s 50th Annual Meeting, the [Equity Framework](#) was revealed for the first time. Outgoing board Chair Gilbert Miller reviewed the journey taken by the board and Task Force. Incoming board Chair Regan Gruber Moffitt illustrated why the framework was urgently needed. Lee noted that the acceleration of SECF’s equity work began five years earlier when she heard a keynote speaker, Wes Moore, discuss his book (titled [The Other Wes Moore](#)) about two African American children with the same name from similar neighborhoods in Baltimore who had vastly different life outcomes. She said: “We are products of our expectations and how others see us in society. I cried for the hate that kids experience but I believe in the promise of philanthropy and its transformative power in the lives of communities and families.” She added that the Framework provided a roadmap to help ensure that people could reach their full potential.

THE EQUITY FRAMEWORK

The vision of the Equity Framework is to *“Inspire and strengthen learning, leadership, and actions within Southern philanthropy dedicated to the advancement of equity in our field and region.”*

The goal of providing opportunities for all SECF members to grow and learn, no matter where they were on their own racial equity journey, was reflected in the components of the Equity Framework. The specific programming that the Framework offers members includes:

- Chair’s Book Club – To help people find common ground and build meaningful relationships through discussion of popular titles related to themes of diversity, equity, and inclusion.
- Southern Learning Journeys – To help members understand how the Civil Rights Movement of the 1960s and the human rights movement today shape educational and economic opportunities and outcomes for children and families in the South.
- Resource Library – To cultivate opportunities for members to use research, data, and trends to best serve underrepresented, underserved, and marginalized communities across the South and provide internal assessment tools.
- Storytelling – To elevate the stories of members’ work through multiple platforms so that all can learn and benefit.
- Philanthropy Bridging Divides – To provide a safe space for a small group of foundation CEOs and other senior executive leaders to talk about the role of philanthropy during challenging and polarized times.
- Peer Leadership Circles – To offer network communities for constituencies and other groups to discuss DEI, economic mobility, the environment, and other issues.

Additionally, the Framework highlights specific organizational commitments that SECF will make internally to reflect its values, namely:

- Organizational Culture – SECF will seek diverse perspectives and people who share common values grounded in justness, fairness, civility, and respect to create a culture of diversity and inclusion.
- Systems – SECF commits to examining and implementing organizational systems, policies, and practices that prevent biases from operating and that do not rely solely on their positive intent.
- Guiding Principles – SECF leaders will ask themselves and their members the following questions: What does SECF stand for? What are we willing to fight for toward improving lives and transforming communities in the South?
- Program Integration – SECF programs will embody the concepts and priorities of diversity, equity, and inclusion.

EXTERNAL WORK

After sharing the Equity Framework with its members at the end of last year, SECF began to implement various components of the programming in early 2020. Though the onset of the COVID-19 pandemic could not have been anticipated, SECF leadership felt extremely well-positioned to respond to the crisis – one that disproportionately affected Black people and other communities of color – as well as the growing Black Lives Matter movement (BLM), reignited after George Floyd’s death. All the time, effort, and work that had been spent on developing the Framework better positioned SECF to be a resource and guide to its members. Through their racial equity learning journey, SECF’s leadership and staff had undertaken the planning necessary to be ready and responsive. After adapting to the need for an entirely virtual platform, SECF was ready to engage its members.

Since the start of the pandemic, SECF has provided members with a [COVID-19 Resource Hub](#) on its website to help organizations respond and operate effectively. This includes a Listserv platform to share questions and ideas, a list of rapid response funds, resources for foundations, and virtual meeting opportunities. Similarly, SECF has created a [Racial Equity Resource Hub](#) that includes tools and resources, films, books, podcasts, and other material to help members as they work to end racism in their communities, as well as connect around these issues.

In direct response to the George Floyd murder and the ensuing racial justice protests, SECF released a statement titled [A Call to Action for Southern Philanthropy](#). The statement acknowledged that a conversation on our nation’s “painful history of systemic racial inequity, injustice, bigotry, and discrimination” is long overdue. Additionally, the statement referenced SECF’s Equity Framework, which calls on philanthropy to acknowledge the historical roots of inequity and to use its resources to spark change. The statement concluded:

“The past week not only shows just how important this work is but also strengthens our commitment to it. We ask all people who share this goal to join us so that we, together, may build a region where all people can participate and prosper.”

EQUITY PROGRAMMING

SECF has begun to implement the “Storytelling” component of the Equity Framework, which is designed to elevate the stories of members’ work. The organization has launched a podcast, *The Bridge*, which focuses on how foundations are bringing together people in communities to bridge divides and start conversations at the community level to make progress on equity. The [second episode](#) of *The Bridge*, which was recorded after the onset of COVID-19 and the expanding BLM movement, featured Lee leading a conversation around both of these topics with Cory Anderson, Chief Innovation Officer at [Winthrop Rockefeller Foundation](#), and Robert Dortch, Vice President of Program and Community Innovation at the [Robins Foundation](#).

SECF is also increasing its focus on equity in other “Storytelling” platforms such as its *Inspiration* magazine. The first issue of 2020 featured a special report on how SECF members across the region are responding to COVID-19 with a focus on partnership, collaboration, and equity. Additionally, the magazine included a story on a family foundation in Tennessee and its journey to learn about structural racism and develop a public commitment to diversity, equity, inclusion, and justice. The second issue of *Inspiration* magazine focuses explicitly on racial equity and racial justice and highlights how SECF members are responding to these issues.

With the recent launch of its “[Chair’s Book Club](#),” SECF provides an opportunity for members to be introduced to new titles that can encourage dialogue about equity. The first book selected, [The Sun Does Shine: How I Found Life and Freedom on Death Row](#) by Anthony Ray Hinton, is an autobiographical account of Hinton’s wrongful conviction and placement on death row before his exoneration and release through the efforts of the Equal Justice Initiative. In addition to small group discussions of the book that members can join, SECF arranged for the executive director of the Southern Center for Human Rights, Sara J. Totonchi, to speak virtually about the state of criminal justice in the South and inequities in the system. While the speaker was selected prior to the current racial justice movement, it was again an example of how SECF’s learning journey positioned it to lead on a timely issue.

SECF established an online “[Lending Library](#)” to support the “Chair’s Book Club” and provide members with access to a collection of e-books that they can borrow. In addition to the “Chair’s Book Club” selection, the library includes books on equity, leadership, and best practices in philanthropy. SECF has seen a growing interest in these books among members. Along with the library, SECF also offers its members a collection of resources related to equity in philanthropy from different organizations to provide an opportunity for them to engage more deeply around equity issues.

SECF held its 2020 Annual Meeting online on November 11-13. The theme of the meeting was [Leading the Way](#) and it addressed how philanthropy can lead at this moment and focus on racial equity as being at the center of all equity work. The sessions focused on topics such as storytelling for social change, community voice in grantmaking, equitable evaluation, and race, place, and system inequities. The meeting featured speakers such as Richard Rothstein, author of [The Color of Law](#), which chronicles the history of redlining and segregation in America; David Williams, who is a professor of public health, African American studies

and sociology at Harvard University; and Susan Taylor Batten, CEO of [Association of Black Foundation Executives \(ABFE\)](#). SECF also worked with Race Forward to organize a pre-conference session for members to engage in a racial equity training and is planning to develop a deeper partnership with Race Forward to ensure that the training is not a single event but is part of a longer process.

As it moves forward, SECF is also looking to foster additional partnerships. Staff members have initiated conversations with the Racial Equity Institute and SECF will continue its partnership with MDC. Additionally, SECF has brought together a cohort of foundations to collaborate on addressing inequities. It recently offered a session to members titled *Breaking Through Barriers: Thriving Through Crisis*, which garnered a large amount of interest and support from members all across the region as well as national funders. The session focused on inequities that COVID-19 has surfaced and how to ensure that all of the resources that members bring, including social, moral, intellectual, and financial capital, are deployed into the South. David Dodson, Senior Fellow and former President at MDC, provided a “State of the South” report and Sherece West-Scantlebury, CEO of the Winthrop Rockefeller Foundation, served as the facilitator. As a result of the event, SECF has now identified a group of funders interested in organizing to pressure policymakers to ensure the South is receiving as many resources as possible. These foundations, which include both national and Southern funders, are also looking to partner with each other to leverage resources that can be deployed into the South.

Recognizing that creating change requires a focus on policy, SECF is also engaging members on issue-based policy and advocacy around equity. Each year, SECF brings a delegation of philanthropic leaders to Washington, D.C., for Foundations on the Hill (FOTH), the field’s annual opportunity to meet with lawmakers and their staff and advocate for policies that impact philanthropy. At previous FOTH events, SECF members have focused on the defense of the sector and philanthropic freedom. However, this year SECF framed those issues around disparities in the South and the tools foundations need to address those disparities by opening up more avenues to philanthropic giving. This new approach is part of the Southern Policy Framework that SECF adopted recently and is strongly tied to the Equity Framework. While this is not a public-facing policy framework, it guides SECF’s public policy strategy and the work of its Public Policy Committee, which identifies and monitors legislation affecting the interests of SECF members and the philanthropic sector. SECF is now developing a process to integrate its equity work into its public policy work.

Several other components of SECF’s Equity Framework will not be implemented until later in 2021. This includes the “Southern Learning Journeys”, which could be offered virtually through photography and videography, “Peer Leadership Circles”, and “Philanthropy Bridging Divides.”

WHERE ARE SECF MEMBERS IN THEIR RACIAL EQUITY JOURNEY?

SECF has been very mindful that not all of its members are starting their equity journey from the same place. In its last annual member survey, SECF asked members where they considered their organizations to be in terms of their comfort in discussing diversity, equity, and inclusion, or working on those issues, and whether their organizations are adopting them as core values. What SECF found is reflective of the field overall in that there is a range of responses, with some organizations being further ahead of others. Additionally, there is also variation within organizations, with certain staff being ahead of others. Some of SECF's more progressive members are explicitly emphasizing racial equity or are on their way to doing this more. More conservative members are hungry to learn and want to be on the right side of history, but a broader equity agenda that includes racial equity appears to be more palatable for them; they are still learning about racial equity. SECF has tried to create different entry points for members to interact with the Equity Framework and be brought along in some manner.

When SECF surveyed members after the 50th Annual Meeting about the Equity Framework, they had a very high response rate and comments were overwhelmingly positive, with many members sharing that they were glad to see SECF move in this direction. One caution SECF received was to be thoughtful and careful in the implementation of the Framework and to recognize that members are in different places when it comes to this work.

SECF has not seen any changes in membership since sharing the Equity Framework, though typically they experience a minimal change in membership on an annual basis. Leadership hopes to have more members joining as a result of the Equity Framework. In fact, SECF has had several larger or national funders join in the last year. While some of that could be due to the 50th anniversary and other factors, SECF added several new members who have been in the field for a while but are only now deciding to become a part of SECF.

IMPACT OF COVID-19 AND BLM ON SECF MEMBERS' INTEREST IN RACIAL EQUITY

Notably, as a result of COVID-19 and the growing BLM movement, SECF has seen an increase in members' interest and commitment to engage in racial equity work. Some members have called the pandemic a "waking moment" that revealed the depth of inequity and how it pervades so many aspects of everyday life. Whether conservative or progressive, these members are interested in learning and engaging. In virtual meetings, members are more willing to "name the problem" of systemic racism and are pushing for more direct acknowledgment and action. As an example, the leaders of two of SECF's members, the Kate B. Reynolds Charitable Trust and The Duke Endowment, wrote a joint op-ed for the Winston-Salem newspaper focusing on the need for systems change. For The Duke Endowment, this type of public statement reflected a new strategy. This is significant given that The Duke Endowment is a large funder and embraces a "Passing Gear" approach, which encourages foundations to identify ways to advance progress beyond grantmaking and be broader civic

actors. SECF has also seen progress with other members who are releasing statements and being unafraid to talk about racism and to state clearly that Black Lives Matter. Some SECF members, in response to COVID-19, have also increased their payout or reduced their grantmaking requirements and have placed a strong emphasis on the disproportionate impact of COVID-19 on communities of color.

COVID-19 and George Floyd's murder brought many things to light that were previously less obvious to some and have provided an opportunity for SECF members to see and discuss racial equity issues more openly. SECF is seeing this within its affinity groups, which are member-led and member-driven groups of members, supported by SECF, based on a common geography or other interest. For example, the Georgia Grantmakers Alliance has been very active in organizing COVID-19 response calls and recently held a call highlighting what foundations are doing around racial equity. There was a great deal of interest in the call because members are open at this moment to learning about strategies that they can implement.

This interest among members to learn from each other is also evident with SECF's email listserv platform, which it launched last year. On the topic of racial equity, there have been requests for reading lists, consultants, resource materials for boards and staff, and information on best practices. Members are also interested in assessment tools to help them understand where their organizations are on racial equity compared with other foundations, as well as tools to help them assess their progress on the journey. Some are also interested in measurement and how to determine success as they are building a strategy.

INTERNAL WORK

In its Equity Framework, SECF has committed to integrating a focus on equity within its organizational culture, systems, guiding principles, and programming. To guide the implementation of the Framework internally and ensure that it is reflected in every aspect of the work, the board approved converting the Equity Task Force to a standing Equity Committee that has begun to meet regularly. Stacia, who also helped SECF during the early stages of its learning journey, is the key consultant for the Equity Committee and is working with Tiffany Friesen, Vice President of Programs and Partnerships, and Robert Dortch, the current chair of the Equity Committee who will begin his tenure as Chair of the Board next year. As such, the Equity Committee has a high-level of leadership support.

At the beginning of 2020, SECF went through a process of revising its [Values and Guiding Principles](#) to reflect its focus on equity. The five key values are now *integrity, excellence, respect, courage, and equity*. Equity was elevated as one of the key values of the organization and, combined with the courage component, is intended to indicate SECF's intention to be an organization that leads on equity. While racial equity is a prominent and central part of everything that SECF does, the Equity Committee has enhanced that focus even more, suggesting that not only is it central to SECF's work but also must be the priority for the Equity Framework, even while recognizing that the Framework embraces the LGBTQ

community and other marginalized groups. As a result, SECF has continued to make that more explicit and communicate that to its members. The initial definition of equity that was used in the Equity Framework and adopted in SECF's Values and Guiding Principles did not explicitly mention racism, though it was assumed. However, when SECF began its strategic planning process with the board this year, it became clear that the definition needed to be more intentional and explicit. SECF recently amended the definition in its Values and Guiding Principles and the Equity Framework to put a particular emphasis on the role of racism. The current definition of equity on the SECF website, with new language emphasized, reads:

“We define equity as the full inclusion of all people into a society in which everyone can participate and prosper. In an equitable society, everyone, regardless of the circumstances of birth or upbringing, is treated justly and fairly by its institutions and systems. To promote equity in the South and elsewhere, philanthropy must first acknowledge the historical roots of inequity, particularly caused by racism, and the present-day systems that perpetuate it. It must then use its resources to spark transformation that allows all people to reach their full potential, unhindered by hatred, bigotry, exclusion, or discrimination.”

Since the onset of COVID-19 and the growth of the BLM movement, the Equity Committee has been engaged in several discussions about how SECF should respond to issues of racial equity and racial justice not just in the present moment but in the long-term. Interviews were completed with Committee members and several board members to identify priorities and goals for the next strategic plan for 2021-2025. These goals will play a large part in the formulation of the strategic plan, which will be adopted in early 2021. SECF has also begun working with a rebranding group and is in the process of revising the mission and vision of both the Equity Committee and the organization to reflect that its commitment to racial equity is a part of what SECF represents as an organization. While the staff and board are in the early stages of their internal work, SECF plans to continue to infuse this commitment to racial equity within every aspect of the organization.

WHERE IS SECF IN ITS RACIAL EQUITY JOURNEY?

While SECF has been in existence for 50 years and has been working on racial equity issues for almost a decade, Lee says it has been a slow and incremental process. It took nearly 10 years from her arrival to get to the point of creating an Equity Framework, though this does not diminish the amount of time, effort, conversation, and training that has gone into getting to this point. While Lee celebrates progress made so far, she believes SECF is still in the very early stages of its journey. However, she believes the organization's deep commitment and plans to infuse racial equity within its overall operations, administration, talent management, hiring practices, culture, mission, and vision demonstrate that this has become part of SECF's DNA and is not a short-term goal. SECF's board and staff have begun the internal work of ensuring that all policies, practices, and processes reflect this commitment as a major priority. Incoming board Chair Moffitt, in introducing the framework, shared the collective hope that this commitment will become so embedded and understood that it will last well beyond the tenure of the current CEO and board.

FUTURE GOALS

In thinking about future goals, Lee shared that organization leaders want to ensure that SECF is "walking its talk" and demonstrating leadership around racial equity. With regard to internal work, this means that in the hiring and selection of consultants, contractors, and vendors, SECF is focusing on equity, and racial equity in particular. This includes how SECF engages with people and the culture of the organization. It also means participating in racial equity training sessions and learning opportunities before or at the same time they are offered to members. SECF leaders want this commitment to racial equity to continue to be infused in the DNA of the organization. Once they have done the work internally to build policies, processes, and practices, they want to be able to share that learning with SECF members to guide them around what they need to be doing within their organizations, as well as with their grantmaking.

...giving grants to the same organizations every year without addressing systemic issues will not lead to fundamental changes in communities.

Another goal is to help educate members about what the data demonstrates regarding conditions in their community and where they are investing resources so that they can be more equitable in their grantmaking. As the *Passing Gear* report demonstrated, over the last 10 years there has been little change in the direction of the funding and the needs in the Southeast. While individual members may feel they are making progress on certain outcomes, the data indicates that collectively, as a region, they have made little progress. Through the provision of data, including the [Southern Trends Report](#), SECF wants members to understand why it is critical to support people of color-led organizations within their communities and to walk the talk of equitable grantmaking. SECF is trying to nudge

foundations toward the realization that giving grants to the same organizations every year without addressing systemic issues will not lead to fundamental changes in communities. Additionally, SECF wants foundations to consider how to increase their payout, particularly in times of crisis.

SECF also wants members to understand that decision-making, not just by the foundation CEO but also its trustees, is important. SECF wants to support trustee development and education and wants foundations to realize that they have to diversify their boards and be reflective of the communities that they serve.

Helping members understand the history of the region that they live in is an important goal for SECF, which it has begun to pursue through the “Chair’s Book Club”; the upcoming “Southern Learning Journeys” will also serve that purpose. Lee shared that these kinds of experiences, as seen with the first Book Club selection, can be transformative. One of the foundations that participated in the Book Club was very conservative and has always been firm about its grantmaking strategy. However, after engaging in the Book Club and learning about people on death row who have been wrongfully accused, foundation leaders shared with SECF that they had changed their thinking about their grantmaking as they recognized that they did not know everything.

While in the past SECF saw itself as a neutral convener, through the Equity Framework it is now more clearly stating that SECF wants the South to be a region where everyone can participate and prosper – and that lends itself to a certain type of philanthropy. SECF wants to ensure that its members are aware of this and have the tools to engage in that type of philanthropy.

REFLECTIONS ON THE JOURNEY

In reflecting on their journey so far, one thing SECF staff are proud of is the process that led to the Equity Framework. They were very intentional about how they implemented their learning journey and undertook steps along the way to ensure members were supportive and aware of the process as it was unfolding. Given their broad and diverse membership and recognizing that all the resources their members bring are necessary to make a difference in communities, staff wanted to ensure that members felt they had a place at the table. As a result, members were ready when the Equity Framework was finally presented. More importantly, members embraced the Framework and wanted to learn more about how to engage their boards, connect to consultants and other experts, etc. Additionally, since the process involved two years of work, it meant that the SECF staff and board understood and believed in the Framework so there was buy-in at every level—staff, board, and membership.

Lee also shared that SECF has had a great deal of programmatic success; even as staff had to transition to a virtual framework, they have received an enormous amount of interest and support because people are hungry for information and knowledge. However, Lee recognizes that putting the Framework in place, and adopting the definition, language,

culture, and internal changes it calls for, would not have been possible without the partners SECF has worked with who have been so open and willing to help support the organization as it has moved forward. This includes, among others, the Racial Equity Institute, Equity in the Center, ABFE, Race Forward, and various consultants. This process has also allowed SECF to build stronger coalitions with other PSOs and has helped to inform collective learning.

Looking ahead, one of the biggest challenges Lee sees is America's position around issues of race and racism.

One challenge SECF has grappled with is around how much to lead versus how much to let members lead given that SECF is a membership association. The board has had lengthy discussions about this and how to create a middle ground where they are not too far ahead of their members and not lagging far behind. There are risks associated with being too progressive and having members leave or not being progressive enough and losing members. Finding that balance can be a challenge.

Looking ahead, one of the biggest challenges Lee sees is America's position around issues of race and racism. There are too many people willing to tolerate racist rhetoric, causing multiple challenges and threatening our democracy. Additionally, when we disagree or have different ideologies, we stop listening to each other. She emphasized that people have to be willing to see the value in all humanity in order to take the time to listen. If we shut people out who do not think like us, then we are just talking to each other. Because of the diversity and breadth of its members, SECF cannot afford to do this. As an organization, SECF recognizes that it will take members of all kinds and beliefs to change what is happening in America and across the South – the challenge is figuring out how to build bridges because there is a need for more allies.

SECF staff suggested that other PSOs beginning a racial equity journey should first take the temperature of the membership and understand where they are and what they are looking for. This is important, not just in terms of identifying what to undertake but also for assessing buy-in. This is also critical to establish momentum from the start and to demonstrate that there is a strong desire for a focus on racial equity.

While SECF leaders have had internal debates about how hard to push members, they have been pleasantly surprised by how eager members are to engage in this work. The current movement provides a momentous opportunity for PSOs that are beginning a racial equity journey, though it is also important to recognize that the journey does not end. It is essential to constantly reassess and reevaluate.

Lee also shared that in the current environment there is no time to waste and it is important to make commitments while building relationships and bridges as quickly as possible because people in communities are depending on philanthropy's support. While philanthropy is quick to put forward rapid response funds, Lee notes that when it comes to bringing voice to issues and leveraging reputational, intellectual, social, and moral capital, there is a tendency to hold back or be silent. She emphasized that with economic, public

health, racial justice, and democracy crises colliding, there is an urgent need for philanthropy to bring all of its capital to the table and to act.

Finally, she noted that while there is a strong urgency to act it is important at the same time to be patient with partners and allies. While not everyone is going to be in the same place, it is important to support each other and make a commitment to stay together to create change. She emphasized the importance of listening, communicating, being honest and transparent, and bringing integrity to the process. Without this, partnerships and allyship will not work.