



EXECUTIVE SUMMARY

Advancing Racial Equity in Philanthropy: A Scan of Philanthropy-Serving Organizations

July 2018

Introduction

"Foundation) members are asking, 'What do I do?' But many need introductory learning. This is an iterative process for most foundations—small and incremental steps."

United Philanthropy Forum envisions a courageous philanthropic sector that catalyzes a just and equitable society where all can participate and prosper. It is not possible for us to achieve this vision without addressing racial equity, which is why a key strategic priority for the Forum is to advance racial equity, diversity and inclusion in philanthropy.

The Forum strives to be a leading connector, convener and collaborative partner for all regional and national philanthropy-serving organizations (PSOs) on racial equity, diversity and inclusion. Our network includes nearly 75 PSO members—including regional philanthropy associations and national affinity groups, networks and associations of funders. We are working to help PSOs bring a racial equity lens to all aspects of their work, including their internal operations, external programming, and leadership work in the field, and to catalyze and guide greater PSO collaboration in this work. We believe this has the potential to shift the thinking and practice of many of the more than 7,000 foundations that belong to these PSOs, leading to deeper change to the field.

To help inform and guide our work in this critical area, the Forum conducted a scan of regional and national PSOs in February through May 2018, to get a comprehensive understanding of PSOs' current work and future needs to advance racial equity in philanthropy. The scan involved both a survey that asked about PSOs' current work, future needs and greatest challenges in advancing racial equity, plus in-depth interviews to discuss what it takes to do this work effectively and to identify their key challenges, barriers and opportunities for addressing systemic inequities. 43 regional and national PSOs participated in the scan, representing more than half of the Forum's membership.

Key Findings

Biggest Gaps & Needs for PSOs to Advance Racial Equity

PSOs identified the following as being the greatest needs they have, and gaps they see, for helping them do more to advance racial equity in philanthropy:

- **Access to guiding frameworks, professional development, tools and training on both internal practices as well as working with members on racial equity.** This need was identified by PSOs that self-reported as “beginning” the work as well as those who have been at this work for a while.
- **Access to additional financial resources to support racial equity work.** Many PSOs discussed the need for funding to either contract with skilled consultants and/or training for increased staff capacity.
- **Need for peer learning.** The interest in peer exchange is high within the Forum’s membership.
- **Need for case studies.** Nearly all respondents alluded to a request for case studies or conversations with experienced funders, particularly on how to “influence up” to the level of trustees and president.
- **Engaging board members.** This issue is twofold: PSO staff dealing with their own boards as well as helping their members to engage their foundation boards.
- **A stronger power analysis for the sector, especially around foundation boards and investments.** There is a belief that the sector could benefit from more honesty around the origins of wealth in philanthropy, as well as more timely and accurate data about funding work that is led by and benefits people of color.

“There is resistance from funders (PSO members) who think the idea of racial equity is great, but they don’t think it will work with their boards. Getting past the resistance and getting funders to see tangible steps to take are challenges.”

What Facilitates Progress to Advance Racial Equity

PSOs identified the following to be the most important factors that need to be in place to facilitate greater progress on advancing racial equity in philanthropy:

- **A shared language.** Building a shared language and point of view is critical to getting staff, board and members on the same page relative to racial equity.
- **A focus on structural racism.** Starting the work on structural racism helps move reluctant colleagues on the “margins” of conversations on race who may be tentative about their own personal biases.
- **Meeting people where they are.** It is not possible to “rush” PSOs’ staff, boards or members to a place where they are not; but rather, to meet them where there are.
- **Connecting racial equity to members’ priorities.** Along the lines of meeting people where they are, respondents realize that racial equity should be connected to members’ priorities, whether that is members’ funding issues (health, environment, homelessness, etc.) or geographic regions (data on disparities in the particular PSO’s region) in order to make the issue as relevant as possible to their work.

"For this topic, the work has to be locally flavored and tailored. There are national conversations about racial equity, but they need a customized approach."

Additional Insights

- **PSOs are eager to continue or start the work.** Every PSO expressed a willingness to increase its capacity to address systemic racism and is proactive in laying out specific goals.
- **Hesitancy among some foundations.** PSOs report that less racially diverse foundations are a bit more hesitant to engage in racial equity work (difficulty with the board, sensitivity with the terminology, struggle with the starting point, etc.).
- **The "committed cluster" phenomenon.** Even among seasoned practitioners of racial equity programming, the greatest dedication rests with a highly committed cluster within a PSOs' membership. A key challenge is to move past this cluster and bring along more members to engage in racial equity work.

About the Forum

United Philanthropy Forum leads, strengthens and informs a national network of more than 70 regional and national philanthropy-serving organizations (PSOs) that advance philanthropy's impact for the common good. We envision a courageous philanthropic sector that catalyzes a just and equitable society where all can participate and prosper.

Forum members represent more than 7,000 philanthropic organizations, making us the largest network serving philanthropy in America. The Forum is creating a new kind of philanthropic network that brings together regional PSOs' deep regional roots and connections with national PSOs' deep content knowledge and reach. Given our network's scale and scope, we can lead change and increase impact in philanthropy in a deeper and broader way than any other organization.

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

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The full report can be downloaded from the Forum's website at

www.unitedphilforum.org/racialequityscan