### Public Policy Peer Community Session Agenda

United Philanthropy Forum Annual Conference

Cleveland, Ohio

July 15, 2019

2:30-5:00 PM

**NOTES**

Structures, Processes, and Tools

* Where are all our organizations located?
* How can we liaise among ourselves to advance racial equity?
  + What toolkits exist and are we using the tools? (Eg. What’s Race Got to do With It?)
  + Where are these discussions already happening?
* Reactive vs. proactive advocacy
* Home Depot analogy – rely on those who can actually facilitate and use the tools
  + These are tools that support funders in going into communities
* More tools
  + Race Forward has helped set the operations definitions, how to start and exercise the muscle
  + Cardozie Jones: intenal culture change to build anti-racist policies within our organizations (eg. Working with philanthropy New York on rewriting values statements)
  + Work needed to bring board on racial equity journey
* When the rubber meets the road, what is different? Does changing the mission statement change the work?
* What is next?
  + Cohort based programs
  + Survey to funders specific to intersections of racial equity and policy. Building trust and small collaborations based on what we know about those interests. How do we build up and bring more funders in?
  + Transparency and reporting – funders can see what peers are doing, peer pressure, trust and comfort in not being alone
  + Funders are impatient, might not see connections with the policy long game
* Identify and develop ambassadors
* Educate different types of members in these spaces
* Glasspockets.org – 25 criteria rubric around transparency, 100+ foundations have self-assessed. Also, a peer learning component, funders can see peers’ policies.
* Does our organization have a policy lens that includes equity?
* Develop policy communication
  + Add a racial equity lens – address the impact of the policies
  + Policy bulletin with a proactive, explicit equity analysis

Shift Philanthropic Culture and Convince Philanthropy to Invest in Advocacy for Racial Equity

* Get members to fund transformative giving. Feeling like funders are not funding the right things.
* Need to do a better job of naming racial equity priorities.
* Board fearful of engaging in direct advocacy. “Public policy not part of our mission.”
* What does it take to do this well?
  + Staff capacity issue
  + What does “well” mean
* PSO public policy priorities
  + Start with the small things
  + Begin monitoring role of policy priorities
  + Census as example of policy action
* How PSOs think about racial equity in their policy work
  + Importance of getting board “ready to do this”
  + Call it out. Be specific. Go beyond talking generally about “people of color”
  + Collect data.
    - Understand the makeup of group you are funding.
    - Use data to understand intersectionality (eg. Race x gender)
    - Cross-reference your data.
    - Challenge: capacity to do all this.
  + How to address diversity of foundations and nonprofits in determining grantmaking
    - As a funder, it might be challenging to require
  + Should funders be funding direct services or focusing on policy issues and root causes?
  + Example for others to follow: Horizon Foundation working with ABFE. Did training on racial equity series. Focused on capacity building.
* PSO Census Work
  + Joined complete count committees
  + Holding local convenings for members
  + Challenge: some foundations are not interested in census
  + Opportunity: convene members who work on many different issues to come together around census. Ties together multiple topics and funders.
* Fear of advocacy
  + Unclear definitions. What constitutes “advocacy”?
  + Challenge of coming from a conservative state.
  + Do we need separate ways/language to engage Democrats and Republicans?

How to maximize networks and partnership at the local, state, and federal levels?

* Connect PSOs on activities re: public policy
* Connect affinity groups with issue-based PSOs
* Inclusion of community advocates in development of policy
* Power: non-members on policy committee
* How do you support power distrupters?
* How do we establish trust between CBOs and PSOs
* FOTH
  + How national PSOs with expertise lead conversations, i.e. issue based
  + Develop committee strategy between geographic and issue based PSOs
* Directory of “focus areas” for connections
* Issue based PSOs – forecast of policy to coordinate our action
* What channels for intersectional work?
* How do we think about not advancing public policies that advance racist structures?
* How do we connect this conversation with rural communities?