

Race, Equity, Diversity and Inclusion (REDI) What's Ahead for Philanthropy in Massachusetts - January 2023

When we began our recent journey to develop a Race, Equity, Diversity, and Inclusion (REDI) Strategy we were reminded of the numerous calls to action (CTAs) for philanthropy to center equity, and shift power to communities. We also desire to help move funder organizations of all types throughout the Commonwealth and at different stages of their REDI journey. While acknowledging that change can be slow and many institutions are challenged to move beyond public statements, we recognize the momentum around REDI (both locally and nationally) that currently exists.

As of December 2022, we wrapped up a nearly year-long engagement with **Community Science**, the research and evaluation firm with which we partnered. Entering this engagement and relationship, we knew:

- We could not act alone to center and advance REDI within individual organizations and the field
- We craved data to inform the development of a responsive and effective REDI strategy
- We had to transform and strengthen our own internal REDI efforts and practices to develop meaningful priorities for the sector
- We needed to clearly define our unique role in this REDI journey – as a membership organization comprising both funders and nonprofit organizations – and commit to the hard work required.

Here's more background on our approach, framework, and the key elements that informed our REDI Strategy development:

Approach and Framework

In our approach and framework, we focused on how to operationalize equity beyond grantmaking practices and public statements. Our strategy to spread and sustain REDI practices requires a systemic approach that builds on, and goes beyond, each philanthropic institution's REDI journey. Our work is not solely about changing one-off practices, but also about changing how philanthropy does business. To ensure meaningful and sustained change, we utilized a systems-thinking approach – tending to root causes of racism and inequity, not just the symptoms. We also wrestled with the tension between wanting to be bold and steadfast in setting expectations for disrupting the status quo and acknowledging varying degrees of readiness from peers in the sector.

REDI Strategy Working Group (WG)

Eleven funders, inclusive of several Philanthropy MA Board members gathered, from February 2002 through June 2022, as allies and champions to co-develop strategies to help the field advance and break down barriers to meaningful change. The eleven participants were:

- Jacquie Anderson, **Blue Cross Blue Shield of Massachusetts Foundation**
- Lydia Bergen, **Fidelity Foundation**
- Cathy Edwards, **New England Foundation for the Arts**
- Josie Greene, **Josephine and Louise Crane Foundation** (Philanthropy MA Board Member)
- Cuong Huang, **Mott Philanthropic**
- Liana Krupp, **Krupp Family Foundation** (Philanthropy MA Board Member)
- Kim McCabe, **Klarman Family Foundation**
- Caroline Murphy, **Foundation for MetroWest**
- Dr. Gislaine Ngounou, **Nellie Mae Education Foundation**
- Alexandra Pineros Shields, **Brandeis University, Heller School** (Philanthropy MA Board Member)
- Nancy Stager, **Eastern Bank Foundation**

Working Group members represented different types of funders [private (including family), community and corporate] and were at different stages in their REDI Journey, individually and organizationally. This group provided strategic thought partnership and guidance. They did not necessarily speak on behalf of their respective organizations, nor were they tasked to collectively represent Philanthropy MA's membership or the MA philanthropic sector.

This Working Group articulated that they hope *funders will...*

- Be more self-reflective and understanding of the historical context of frontline communities
- See community members as assets and not just as vulnerable and in need of charity
- Be seen as part of the community
- Have decision-making rooms and spaces not only comprised of funders, but inclusive of those impacted by decisions
- Have greater collaboration with community leaders and other funders
- Experiment and try new things and not be afraid to fail
- Adopt a posture of learning rather than knowing
- Have community members as part of advisory groups and boards

State-wide Survey and Informant Interviews

To make sure we were considering all perspectives and funder organizations' insights on how to shift the sector, we launched a state-wide survey June 2022. 160 individuals responded to the survey representing 120 unique organizations from across the Commonwealth, complementing and enhancing the Working Group's thinking and work. We also conducted informant interviews to uncover the behavioral and organizational barriers funders might be facing in moving from thinking to action, in integrating equity and taking next steps. In addition to testing our own assumptions and learning, we needed to ensure strategies would resonate and ultimately lead to meaningful, sustained change.

Key Findings: State-wide Survey

- Equity is the most prioritized issue throughout the Commonwealth, regardless of region
- Most funder organizations are planning or have started implementing REDI efforts and are seeking support to go deeper, take next steps, and keep momentum

- Future state of philanthropy requires shifting mental models of leaders, organizational practices and greater transparency on progress made with regard to REDI efforts
- Funder organizations are looking to Philanthropy MA for leadership, tools and convening opportunities to support their efforts

Promising Practices: Informant Interviews

- Prioritize multiyear grants to build relationships and the learning that emerges over time, and offer flexible support
- Provide unrestricted funds rather than prescribing solutions in communities
- Listen and learn from local organizations, so that partnerships arise from community needs that are brought to funder organization
- Apply “Do, Learn, Share” methodology that involves researching and learning from the funding process and also sharing those learnings with others (good and bad).
- Identify cluster of consultants to use over the different stages of funder organization REDI journey, specifically those that can support during conflict, resistance, or organizational fatigue
- Offer peer support opportunities to funder organizations who have made a REDI commitment where funders can share experiences and stories of challenges in a confidential way and support each other
- Clearly communicate the boundaries of the organizational REDI conversation at each stage of journey
- Specifically, and clearly share with staff and leaders what is and is not part of organization current conversation on racial equity. Not easy, as some staff may disagree, but this helps funder organization to focus action.

Internal Philanthropy MA Work: Currently

Alongside our externally-facing activities, we are continuing our own REDI journey, currently boosting our internal capacity, skills, and knowledge (technical, lived-experience, content, etc.). Though we have more work to do, we’re proud to share some examples of this internal work.

- Board prioritizes leading on and investing resources in REDI strategy
- Engaged in Board & Staff retreat (November 2022) which built trust among staff and board, greater understanding of values, shared experiences, mental models, focus on systems change, and desired state for philanthropy
- Reviewed policies with equity lens (including, but not limited to Personnel Manual)
- Adopted an Investment policy with ESG as a focus in 2022
- Ongoing assessment of Staff needs, capacities and competencies (individual and collective) with regard to REDI and allocating funds towards trainings
- Providing training to address needs (including, but not limited to bias, shared language, and history of structural racism)
- In programming, we seek to bring diversity of voices and trainers and provide stipends to all NPOs presenting to funders

Where We Are Now, Why Philanthropy Massachusetts

To infuse urgency to act, we have discussed what is at risk if the sector does nothing. To that end, we are excited to share the following REDI Strategies:

1. Provide strategic leadership in how to cultivate networks advancing REDI through a range of platforms
2. Leverage Philanthropy MA networks for peer-driven collective efforts to disrupt the culture of philanthropy, centering REDI
3. Reimagine how Philanthropy MA programs, initiatives, offerings, committees, and partnerships are intentionally centering REDI
4. Enable the conditions to call funders into the REDI journey

Here are 5 actions we are prioritizing and planning to take NOW:

- Identify metrics for the sector in MA to report annually regarding the progress of shifting the sector in a few key areas
- Provide space for peer funders to work together, pilot innovative funding, and disrupt the culture of philanthropic practices
- Host peer learning gatherings to focus on strategies to overcome internal or external barriers or resistance to centering equity
- Evaluate and adapt our programs, offerings, and initiatives to center REDI more explicitly or intentionally
- Partner with others to highlight repository of REDI resources on the Philanthropy MA website

These additional 4 actions have been identified as future goals:

- Develop a strategy to use communications platforms for the sector and Philanthropy MA to pose critical questions to sector and provide space for storytelling, success stories, narrative change, tool kits, and best practices
- Co-develop with members and partners a public policy agenda to shift power and money to communities of color and low-income communities
- Foster relationships across networks, to encourage peer learning and connections across networks for sector trends and intersections to communicate up and out
- Identify and lift up existing case studies, toolkits, and resources, best practices, around REDI topics (e.g., shifting power, overcoming resistance)—concrete examples of how to embed REDI (beyond training) internally and externally

Working with Board and staff, Philanthropy MA will use these REDI strategies as the grounding for making clear decisions around our REDI-related role, member offerings, partnerships, and metrics to gauge success and other aspects of our work.

As a philanthropy serving organization (PSO), our primary roles are to inform, influence, activate and advocate. We also seek to continuously learn and grow as an organization. We have the opportunity to influence the sector, beyond the individual (or organizational) level, effecting the system change we desire. This is a moment to facilitate mass action for philanthropy to place REDI at its core, while national and local REDI momentum is still on our side.

Ultimately, our goal is to help our members move the REDI needle within their organizations and communities and to collectively move the field in advancing equity and justice in the philanthropic sector and the Commonwealth. *Thanks for your part in achieving this goal. We remain committed to not only thinking, growing, and learning together, but also doing.*

For more information, [contact Alex McCray](#), VP Member Engagement and Strategic Initiatives