

# Equity: Is Your Foundation Ready to Invest in Building Opportunity for All?

**DISCUSSION GUIDE & SELF-ASSESSMENT**



## Whatever You Call It, It's About Opportunity

Michigan foundation leaders use a variety of terms to talk about their efforts to improve equal access to opportunity for all: “improving outcomes,” “economic development,” “fairness.”

In 2014, CMF made a definitive decision to use the word *equity* in “all internal and external policies, Public Policy position statements, and programs with the intention of raising awareness of and growing commitment to equity throughout Michigan’s philanthropic sector.” The following definition was approved by the board:

*Equity means having access to opportunities in all indicators of well-being that will lead to positive outcomes regardless of socio-economic status, ethnicity, race, gender, sexual orientation, gender identity, age, ability status, and other factors.*

Because the word “equity” is often preceded by the word “racial,” member foundations in predominantly white and rural communities have indicated that “equity is not an issue” in the communities they serve. But by our definition — and according to our research — **equity is an issue in every community where some populations have less access to opportunity than others.**

People with greater access to resources like preventive healthcare, quality education, and good nutrition are more likely to finish high school, go to college, get good jobs, and pay higher taxes. Equity is essential for the future vitality of our state and everyone in it.

In a state that is still recovering its post-recession economic vitality, Michigan foundations share a growing sense of urgency to help the communities they serve to succeed and thrive in a changing world. They understand the importance of investing time and resources to ensure that our state’s young people will be well prepared to participate in the 21st century’s global economy.

Research shows that one of the greatest impediments to a prosperous future for all of Michigan’s people is unequal access to resources.<sup>1</sup> Certain groups — low-income families, women, people of color — face steeper barriers to opportunity than others do.

To help foundation leaders and their boards begin essential conversations about marginalized populations and determine the extent to which their organization’s culture and grantmaking practices are aligned with a commitment to expanding opportunity in the communities they serve, the Council of Michigan Foundations (CMF) developed this discussion guide and self-assessment. Building on extensive research and the experiences of some exceptional member foundations, it can be a useful tool for foundations at any point in their journey.

## Discussion Guide

### SUGGESTIONS FOR USE

1. Distribute copies (without the assessment tool) to all foundation members, asking them to read and prepare to discuss its content in a “conversation about our foundation’s readiness for working to improve equity in our community.”
2. Block out time for the conversation, and encourage everyone to attend and participate.
3. If possible, bring in a professional facilitator experienced in leading discussions on difficult issues.
4. At the start of the conversation, create a safe environment for honest and open discussion by establishing (or reiterating) some basic ground rules such as:
  - Listen to understand; speak to be understood.
  - Only one person speaks at time.
  - Consider new ideas and different perspectives.
  - Full participation; every voice heard.
5. Encourage participation by all with directed, open-ended questions.
6. Facilitate interaction by asking for responses to individual viewpoints.

## **EQUITY: IS OUR FOUNDATION READY TO INVEST IN BUILDING OPPORTUNITY FOR ALL? LET'S TALK.**



Opportunity is one of our country's most cherished ideals and one of our most valuable national assets. The promise of opportunity inspires each generation of Americans — regardless of race, ethnicity, class, gender, or national origin — to strive to reach his or her full potential. Fulfilling this promise not only benefits each of us individually, but also society as a whole.”

— THE STATE OF OPPORTUNITY IN AMERICA<sup>2</sup>

As part of ensuring that we are doing all we can to continuously improve outcomes in the communities we serve, we want to discuss how we as a foundation view and address barriers to opportunity in historically underserved populations. The goal is to think about our current capacity for pursuing equity work in the communities we serve.

Please read the following discussion guide thoroughly and thoughtfully. Take notes on your questions, thoughts, and ideas, and be prepared to share. Be as open and honest as you can.

## 1. Understanding

Our organization understands the importance to our grantmaking goals of increasing opportunity for those historically left behind in the communities we serve.

### Why it matters



The American dream is more than a job or an income. It is a series of social and economic relationships we have with tangible resources close to home. A growing number of communities now lack the resources for that dream which other places take for granted.”<sup>3</sup>

—DAVID DANTE TROUTT, AUTHOR OF *THE PRICE OF PARADISE: THE COSTS OF INEQUALITY AND A VISION FOR A MORE EQUITABLE AMERICA*

Increasing opportunity for all begins with a deep understanding and acceptance of the fact that some groups have historically been underserved and have not had the same access as other groups to essential resources like preventive healthcare, quality schools, and good nutrition. Foundations working to improve equity need a clear understanding of which groups in their communities face barriers to access.

### What it looks like

“Our mission is to grow regional prosperity,” says Randy Maiers, president and CEO of the Community Foundation of St. Clair County (CFSCC). “We see access to healthy lifestyles and healthy food as a strategy for achieving regional prosperity and growth.”

In a community divided by the Black River into a relatively affluent “north side” and a “south side” where the demographic is predominantly poor and white, CFSCC is working to address a historic imbalance in community investment. When the City of Port Huron recently asked the foundation for funds to renovate a north-side park, the CFSCC board approved the investment. But, Maiers reports, “It opened our eyes to how parks and public spaces are treated on the south side of Port Huron. We realized we need to be more diligent in asking questions about the equity and investments being made in other, socioeconomically challenged areas, which in turn impacts our grantmaking decisions.”

Within the next few months, the first permanent office building owned by the community foundation itself will open on the south side.

### How to talk about it

- Do we all believe that our work should include efforts to increase opportunities in the communities we serve?
- Do we have a clear understanding of the historical conditions that have created barriers to access for certain populations in the communities we serve?
- Do we nurture relationships with representatives of the underserved groups and seek to understand their points of view?

## 2. Commitment

Our organization is committed to improving opportunities for historically underserved populations in the communities we serve.

### Why it matters



Foundations can and should be intentional about who they put in power. It takes a lot of time to be intentional about diversifying board and staff, and to provide one-on-one leadership development for diverse board and staff members. It is hard work, but it is necessary if foundations are truly going to represent the people they serve.”<sup>4</sup>

—MIRIAM PENA, BRETT FAMILY FOUNDATION NONPROFIT PARTNER

In research conducted for the D5 Coalition,<sup>5</sup> leaders agreed that expressing a commitment to improving opportunities for historically underserved populations in the organization’s mission, vision, and values “anchors” the work. It answers the “why” question for staff, board, and community stakeholders, provides a consistent focus for analysis and decision making, and is essential for achieving shared understanding. Having a board and staff that reflect community demographics amplifies the organization’s ability to understand local conditions and form trusting relationships with residents and partners.

### What it looks like

“We empower people to reach their full potential.” The vision of the Steelcase Foundation drives its focus on educational initiatives in West Michigan. “We believe that all children deserve a clear path to economic prosperity through family, education, and community opportunities,” says foundation president Julie Ridenour. “By working collectively to identify and dismantle barriers that limit potential, we can bridge the achievement and opportunity gaps to ensure that all children fulfill their potential.”

Ridenour says the foundation's board has been inspired by the Steelcase Corporation's commitment to equity. (Steelcase, Inc., was recently awarded a "100 percent" by the Human Resources Council for its position on equity and leadership in this work.) "Diversity, equity, and inclusion fit with their purpose and their and our giving," she says. "There is a great passion shared among trustees for those parts of our community that are underserved and in need."

#### How to talk about it

- Is our commitment to improving access to opportunities for those historically underserved clearly articulated in our mission, vision, and organizational values?
- Do our leaders model a commitment to equity?
- Is our board informed about and engaged with the needs of underserved groups in the community?

### 3. Conditions

Our organization operates in ways that express our commitment to improving opportunity for all.

#### Why it matters



When we come up with systems that fundamentally work for those who are most vulnerable in our community, we are coming up with systems that work better for all of us.”<sup>6</sup>

—GLENN HARRIS, PRESIDENT, THE CENTER FOR SOCIAL INCLUSION

A landscape scan conducted in 2015 by Grantmakers for Effective Organizations concluded that “fully committing to reducing inequity often requires changes to grantmaking practices and organizational culture.” Their research emphasizes the importance of reviewing internal practices to understand how grantmakers may be “inadvertently reinforcing inequity through norms, policies, and procedures.”<sup>7</sup> One of the most important practices for equity work is starting with data-based understanding of the current situation and which population group is most affected.

#### What it looks like

“Most states are not on track to have enough college-educated workers to meet 2025 employment needs. We can't make those numbers work without reducing equity gaps and college achievement gaps,” says Caroline Altman Smith. As The Kresge Foundation's deputy director for education, she funds programs designed to improve college access and success for “those not traditionally well served by higher education.”

When working to improve opportunities for all, Smith says, “It’s important to stay grounded in the data.” Hard numbers that illuminate disparities “can catalyze the urgency to act. Funders and grantees need to build their capacity in collecting, analyzing, and interpreting data” in order “to see what’s really happening” and “know which strategies and investments are making a difference and have the greatest potential for impact.”

### How to talk about it

- Do our strategies target the structural issues that limit opportunities of people in underserved communities?
- Do we consistently use disaggregated data to understand who is and who is not being served as a first step in developing grant initiatives or other responses?
- Do we bring together community stakeholders to share perspectives on what is happening in our community as a way of building relationships, shared understanding, and goal setting?

## Equity: Best Practices

A qualitative study conducted through in-depth interviews with executives, program officers, and nonprofit partners of nine foundations (including two in Michigan) — Brett Family Foundation, Con Alma Health Foundation, Foundation for the Mid South, Incarnate Word Foundation, Jessie Smith Noyes Foundation, Kalamazoo Community Foundation, Sapelo Foundation, Skillman Foundation, and Z. Smith Reynolds Foundation — identified a list of best practices “to achieve strategy that targets structural issues.”

- Include the community in strategy development.
- Address structural sources of inequities.
- Make long-term commitments.
- Support the infrastructure of nonprofit partners.
- Trust nonprofit partners’ choices.<sup>8</sup>





## 4. Resources

Our organization has allocated sufficient time and funds to developing internal capacity and supporting policies and programs that increase opportunity for all in the communities we serve.

### Why it matters



While we've been working hard on this for several years, we know our learned experience is inadequate and incomplete compared to the lived experience of people who are the targets of discrimination. So working *with* the community and not just *for* the community is essential.”

—CARRIE PICKETT-ERWAY, PRESIDENT AND CEO, KALAMAZOO  
COMMUNITY FOUNDATION

Building a strong foundation of understanding, commitment, and conditions for doing equity work takes resources. Foundation leaders interviewed by CMF talked about the long-term nature of the work, the need to build new capacities to work differently, and the importance of building broader, more diverse networks of relationships and partners. All of that takes time, dollars, and a willingness to experiment and learn.

### What it looks like

“Equity work is more than making grants,” says Katie Brisson, vice president, program, at the Community Foundation for Southeast Michigan (CFSEM). “It requires building relationships, networks, capacity, and empowerment that results in a foundation substructure that can sustain the work.”

As an example, she points to CFSEM’s “YOUth Voice” program which provides training for youth-serving organizations that helps them embrace young people as leaders that can develop and lead work in their communities. “We believe developing the next generation of leadership is critical to the future of southeast Michigan,” Brisson explains. The three-year project began with a year-long series of four workshops; agencies that attended all four were eligible to receive free coaching from the Johnson Center for Philanthropy. In the second year of the program, youth leaders then conducted a survey of 1,200 young people in the region to identify priority issues of concern. In year three, young leaders from the participating agencies were then invited to apply for grants to address the issues identified by the survey, and CFSEM awarded 18 grants totaling \$150,000.

“Every few months we convene the youth participants in training sessions facilitated by the University of Michigan School of Social Work,” Brisson says. “We intend to share what we’ve learned from this initiative with others.”

**How to talk about it**

- Are we investing in building staff and board understanding and skills to do equity work?
- Do we invest in helping our grantees and nonprofit partners strengthen their own capacity for equity work?
- Do we allocate time and dollars to building relationships and a shared vision of why equity is important to the communities we serve?

## Moving Toward Equity: One Community Foundation's Journey

“We believe that achieving equity is quite possibly the most important work in our 90-year history — and the most important work for the future of our community.”

Addressing a full house of some 2500 Kalamazoo County residents, Carrie Pickett-Erway, president and CEO of the Kalamazoo Community Foundation (KZCF), explained why the foundation is supporting a focused response to growing inequities in Kalamazoo County.

“We know that we cannot be the community we aspire to be until all kinds of individual and institutional discrimination are no longer a part of anyone's daily life.”

KZCF's journey to this November evening in 2015 could be said to have begun 15 years earlier, when its board of trustees approved its first diversity policy, stating that “a more diverse philanthropic community, and one that reaches out to all, will result in richer and more responsive philanthropy that better meets the needs of the community.”

“That was the beginning of ‘walking the talk,’” says Suprotik Stotz-Ghosh, vice president, community investment. “It was clear to us that we could achieve excellence — not perfection — as community leaders and conveners only if we led by example, and this policy set our course.”

Although the course hasn't always been straight, KZCF has held firm to its commitment to lead change from the inside out, learning how to build and sustain the kind of diverse and inclusive organization that could serve as a model to its community partners. Leadership, staff, and board members all completed intensive antiracism training and participated in a comprehensive action learning program<sup>9</sup> to improve individual and organizational intercultural competency.

While each of these programs had its own assessment tool to track KZCF's progress over time, perhaps no measure was more telling than the response to a single item from their annual employee opinion survey. Agreement with the statement “The diversity and inclusion work of this organization is resulting in positive change in this community” jumped by 36 percent between 2012 and 2013.

Yet, despite these signs of progress, KZCF was documenting disparities across the county that indicated there were still serious barriers preventing certain groups and individuals from reaching their full potential and living positive lives:

- Women in Kalamazoo County earning only 75 percent of what men earn, for the same work.
- The City of Kalamazoo ranking highest in Michigan for the poverty rate of African-American children under 18.
- Latino high school students in Kalamazoo County dropping out of school at twice the rate of their white counterparts.

“We know, in large measure, these statistics are the inevitable and predictable consequences of systems and policies that have not served all residents equally,” says Pickett-Erway. “We began to see responding to these inequities as an important role for the Community Foundation.”

With its growing understanding of the importance of leveraging the power of differences, KZCF consulted with community members to get input on priorities and strategies for pursuing an equity agenda. “While we’ve been working hard on this for several years, we know our learned experience is inadequate and incomplete compared to the learned experience of people who are the targets of discrimination,” Pickett-Erway explains. “So working *with* the community and not just *for* the community is essential.”

Stotz-Ghosh notes that many community partners — individuals, organizations, and consultants — have “already begun to help us shape a strategy for impacting equity in Kalamazoo County.” He says that KZCF is currently working with a diverse group of grassroots leaders from across the county to help identify resources and gaps.

Focus groups of residents helped identify racism and poverty as the biggest equity-related challenges, and led to the choice of author Ta-Nehisi Coates — an outspoken chronicler of systemic racism in America — as keynote speaker for the Community Meeting.

Coates began his address with a passage from his award-winning book *Between the World and Me* describing the fear and violence that were a daily reality for him as a boy growing up in Baltimore. He went on to develop a theme that encouraged the audience to always “ask why” — to look at historical data and events to understand the context of the inequities that are perpetuated in their own community today. “Ask yourselves why,” he urged. “Ask yourselves how we got here in the first place.”

Comparing the results of surveys taken before and after the Community Meeting, KZCF found an 11 percent increase in respondents’ understanding of the existence of systemic or institutional racism in Kalamazoo County. Their understanding of the community foundation’s commitment to equity increased by 12 percent.

More than 80 percent of those responding to the post-meeting survey said that Coates’s address had improved their understanding of the broad issue of equity.

## Assessment Tool

### **SUGGESTIONS FOR USE**

1. After reviewing the discussion guide as a group, have each participant complete the assessment tool anonymously.
2. Compile the findings for a candid picture of your foundation's readiness to undertake equity work.
3. Visit the CMF website to identify Learning Service programs, reports, and tools that can help your foundation move forward.

## Is Our Foundation Ready to Invest in Building Opportunity for All? Let's Assess.



Opportunity is one of our country's most cherished ideals and one of our most valuable national assets. The promise of opportunity inspires each generation of Americans — regardless of race, ethnicity, class, gender, or national origin — to strive to reach his or her full potential. Fulfilling this promise not only benefits each of us individually, but also society as a whole.”

— THE STATE OF OPPORTUNITY IN AMERICA<sup>10</sup>

As part of ensuring that we are doing all we can to continuously improve outcomes in the communities we serve, we want to assess how we as a foundation view and address barriers to opportunity in historically underserved populations. The goal is to evaluate our current capacity for pursuing this work.

For each statement below, please indicate whether you believe our foundation is “Still Exploring,” “Making Progress,” or “There!” There are no right or wrong answers; we're looking for an accurate snapshot of our foundation as it operates today.

	Exploring <i>(Haven't decided)</i>	Making Progress <i>(Somewhat true)</i>	We Are There <i>(True)</i>
<b>Understanding</b> Our organization understands the importance of increasing opportunity for those historically left behind in the communities we serve.			
• We value, have defined, and have organization-wide understanding of diversity, equity, and inclusion.			
• We understand the roots and consequences of structural inequity for historically underserved groups within the communities we serve.			
• We understand the importance of working with the communities we seek to serve, and we value their perspectives.			
• We understand and employ best practices in equity work.			
• We understand that improving equity is challenging work that requires dedication and long-term commitment.			

<b>Commitment</b> Our organization is committed to improving opportunities for historically underserved populations in the communities we serve.			
• Our commitment to improving access to opportunity for historically underserved is evident in our mission, vision, values, and goals.			
• Our staff and board leaders are active and consistent champions for equity.			
• We are committed to having staff and board members who reflect the diversity of the communities we serve.			
• Our organizational culture reflects our commitment to diversity, equity, and inclusion.			
• We hold ourselves accountable to representing our values and staying focused on our mission and goals.			

<b>Conditions</b> Our organization operates in ways that express our commitment to improving opportunity for all.			
• Our organizational policies and procedures are aligned with and promote our commitment to equity.			
• Our communications seek to build community-wide understanding and urgency to take action to correct inequities in the communities we serve.			
• Our strategies target the structural issues that limit opportunities of the people we seek to serve.			
• We actively engage with members of the community and those we most seek to serve to build understanding, relationships, and partnerships.			

<b>Resources</b> We have allocated sufficient time and funds to developing internal capacity and supporting policies and programs that increase opportunity for all in the communities we serve.			
• We allocate time and money for staff and board training on issues, skills, and knowledge important to doing equity work.			
• We allocate time and money to develop the organizational capacities needed for equity work.			
• We allocate funds for grantee capacity development, networking, and knowledge sharing.			
• We allocate time and money for community engagement activities.			

## Sources and Resources

- <sup>1</sup> <http://kirwaninstitute.osu.edu/my-product/opportunity-for-all-inequity-linked-fate-and-social-justice-in-detroit-and-michigan/>
- <sup>2</sup> <http://opportunityagenda.org/stateofopportunity>
- <sup>3</sup> <http://blogs.reuters.com/great-debate/2014/02/03/the-other-inequality-is-structural/>
- <sup>4</sup> [www.d5coalition.org/wp-content/uploads/2014/08/D5\\_OMGreport\\_072814-1.pdf](http://www.d5coalition.org/wp-content/uploads/2014/08/D5_OMGreport_072814-1.pdf)
- <sup>5</sup> [www.d5coalition.org/wp-content/uploads/2014/08/D5\\_OMGreport\\_072814-1.pdf](http://www.d5coalition.org/wp-content/uploads/2014/08/D5_OMGreport_072814-1.pdf)
- <sup>6</sup> <https://www.linkedin.com/pulse/how-do-we-achieve-racial-equity-glenn-harris>
- <sup>7</sup> <https://www.michiganfoundations.org/sites/default/files/resources/Equity%20and%20CI%20Memo%20PUBLIC.pdf>
- <sup>8</sup> [www.d5coalition.org/wp-content/uploads/2014/08/D5\\_OMGreport\\_072814-1.pdf](http://www.d5coalition.org/wp-content/uploads/2014/08/D5_OMGreport_072814-1.pdf)
- <sup>9</sup> <https://www.michiganfoundations.org/sites/default/files/resources/Learning-Together-PLAN-Stories-Of-Change-2013.pdf>
- <sup>10</sup> <http://opportunityagenda.org/stateofopportunity>

Katie Janowiak  
Council of Michigan Foundations

Vicki Rosenberg  
Vicki Rosenberg & Associates

Debra Wierenga  
D2 Words





[www.michiganfoundations.org](http://www.michiganfoundations.org)