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What Does it Take to Embed a Racial Equity & Inclusion Lens?

RACIAL EQUITY & INCLUSION LEARNING QUESTION TEAM

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The "Why" of this Work, Our Journey, and Where We Are Going

"Not everything that is faced can be changed, but nothing can be changed until it is faced."
— James Baldwin

"When Trayvon Martin was killed, I was heartbreakingly reminded of just how deep-seated racism and racial inequity are in American society. This not only can affect a young person's opportunity prospects but also put his or her life in jeopardy. But I also thought that this should be our work, and we are really unprepared to take it on."
—Living Cities Staffer

On February 26, 2012, a seventeen-year-old Black teenager named Trayvon Martin was shot and killed in Sanford, Florida, by George Zimmerman. Martin's death ignited a national debate about racism and justice. It was on the nightly news and in the editorial pages. We heard from legal and criminal justice experts, historians, artists, Martin's parents, and President Obama. And, across the country, people were having their own conversations. They were having them at dinner tables and at real and metaphorical water coolers. They were having them on social media and in the streets as a protest movement took hold.

At Living Cities, we were having them too. The days following the Zimmerman verdict were particularly tense at our office, as staff members found themselves in informal but reflective and sometimes emotional conversations about Martin's death, Zimmerman's acquittal, and the pervasiveness of race in America. Several staff members felt that a robust interrogation of the impact of racial inequity on cities was noticeably absent from Living Cities' work.

These conversations eventually set us on a course to radically reconfigure the way the organization works around race.

While Living Cities' work addresses racial equity and inclusion at different levels and in different ways in cities around the country, we were not explicit about this focus. Meanwhile, the historical and prevailing context is that the majority of low-income people in U.S. cities are people of color. **How was it possible, we were asking ourselves, to achieve our mission without addressing the intersections between poverty and race with intentionality?** Further, there was a sense among staff members that conversations about race were not encouraged at Living Cities, both in terms of how we engaged with each other internally and in terms of the story that we were telling the world about our work.

This conversation spread rapidly, with primarily junior-level staffers taking the lead on moving it from the hallway to a conference room. As it became clear that so many people from across the organization felt very strongly about the need to move racial equity and inclusion from the periphery to the center of our work, a group of three staffers—a director, an assistant director, and one of the authors of this article (who was a senior associate at the time)—raised the issue with Living Cities' CEO Ben Hecht.

One of Ben's most frequent reminders to Living Cities' staff is that no matter where you sit in the organization, you are being paid to think. He encourages all staff to participate in meetings, to speak our minds, and to bring our best ideas to the table. Still, acknowledging that **conversations about race often get difficult and messy**, we wanted to do the necessary work to ensure that we were prepared and productive.

As staff, we had gone through training in adaptive leadership, including around having "courageous conversations." That training proved to be extremely valuable, as there was an emphasis placed on seeing things via multiple interpretations and considering the core values and perceived losses of key stakeholders in terms of what one was proposing. Ben has said that his initial reaction to hearing that his staff felt that Living Cities was not being as effective as it could be in terms of advancing racial equity and inclusion both internally and externally, was, "How could this be?" He expressed his commitment to these issues and said that he was surprised

that others did not see it adequately reflected in our culture or work. However, after taking some time to process what he heard from staff, he concluded, as he put it later, **"If so many people felt that way, how could I think that they were all wrong?"**

So, it was with Ben's support that a task force of Living Cities staffers drafted a memo outlining some steps for how we might go about initiating internal and external work to understand and address racial disparities in more intentional ways. One of the first things that we did was to engage Frontline Solutions, a national consulting firm with deep expertise in helping organizations to develop and apply a critical understanding of how race, place, class, and gender intersect and affect opportunity. Then, with Frontline Solutions' help, we engaged the entire Living Cities staff in a conversation about racial equity and inclusion at our annual all-staff retreat. The goal was to create a safe and productive place for staff to grapple with these issues together and to begin to **develop a shared language and a shared foundation of knowledge**.

Many staffers who were here for that retreat and the work with Frontline Solutions have expressed that those conversations and that work illuminated how important applying a racial equity and inclusion lens to our work is, and that it helped them to feel more connected to Living Cities' work and to their colleagues.

Some initial changes/activities that followed included, but were not limited to:

The development of a learning agenda shaped around a series of brown bag meetings. We invited leaders in the racial equity/social justice space, including some of our member institutions, to come and share their experiences with us. And, we engaged with tools and ideas as a full staff during staff meetings.

The introduction of a racial equity impact analysis tool as part of our decision-making process that included the following questions to be asked as we made decisions about budget, staffing, strategy, and partnerships:

- Are all racial/ethnic groups who are affected by the policy/practice/decision at the table?
- How will the proposed policy/practice/decision affect each group?
- How will the proposed policy/practice/decision be perceived by each group?
- Does the policy/practice/decision worsen or ignore existing disparities?
- Based on the above responses, what revisions are needed in the policy/practice/decision under discussion?

The development of branding and communications strategies that center racial equity and inclusion, including our **25th Anniversary event and [compendium](#)**.

A series of pilot projects that included, for example, **applying racial equity and inclusion criteria to new impact investments** from our Catalyst Fund and working with our partners at [StriveTogether](#) to make disaggregating education data by race a requirement for all participating sites.

The centering of racial equity and inclusion in our:

- Mission: Living Cities works with cross-sector leaders in cities to get dramatically better and faster results for low-income people, **especially people of color**.
- Headline Outcomes (Our population level measures of success): Closing racial wealth gap (change in net worth **among people of color** disaggregated by race); Increase in #/% of people earning living wage, **disaggregated by race/ethnicity**; Increase in #/% of jobs created earning living wage.

The launch of **Racial Equity Here**, an initiative that supports five U.S. cities in analyzing how their operations impact people of color and devising actionable solutions.

The formation of a **Racial Equity and Inclusion Learning Question team** to scan the field and our own work for promising practices that might help us and others in the philanthropic, public, and private sectors to apply a racial equity and inclusion lens to social change efforts.

As our work transitioned from a race-neutral approach to one that is fundamentally about closing racial income and wealth gaps, **we had to reckon with the history of America and with the role that institutions like ours and our [member institutions](#) have played in creating and perpetuating inequity**. Inequities in America are not natural. Nor did they happen by accident. The racial opportunity gaps are not the result of inadvertent faults or flaws in our systems. Rather, they have been created and perpetuated by our governments and society. During the Civil Rights Movement, laws and policies were passed that outlawed overt acts of discrimination, but the consequences of history are difficult to erase and structures and systems replicate insidious

patterns of exclusion. Our country's history of [redlining](#) and discrimination in mortgage lending has kept millions of low-income people of color from building wealth through homeownership. And unfortunately, the many successes of the community development industry in scaling affordable housing have been offset by ongoing rental housing discrimination. The fact that the racial wealth gap has widened rather than narrowed since the 1960s is particularly troubling given that we cannot end intergenerational poverty without ensuring that low-income people can grow wealth. **The Pew Center reports that the median wealth of white households is 20 times that of African-American households and 18 times that of Hispanic households.**

And, this gap exists regardless of education level — the median wealth of African-American families in which the head of household graduated from college is less than the median wealth of white families whose head of household dropped out of high school.

We are proud of our willingness and ability as people and as an institution to have the difficult conversations and do the hard work of transformation, from the inside out. But, we have made mistakes along the way. **Racial equity and inclusion is a journey. It is a daily practice.** As staff turned over and as other priorities arose, the promising conversations we were having about race, and our focus on changing policies, practices, and programs slowed, or, in some cases, stalled. Yet, the world kept reminding us just how important those conversations and that work are. As many struggled with the realities of the election of Donald Trump, mass incarceration of men of color, threats to healthcare policy, and the resurfacing of white supremacy, staff expressed frustration, grief, and a sense of urgency around ensuring that our commitment to racial equity and inclusion was alive, well, and sustainable. Some spoke to a

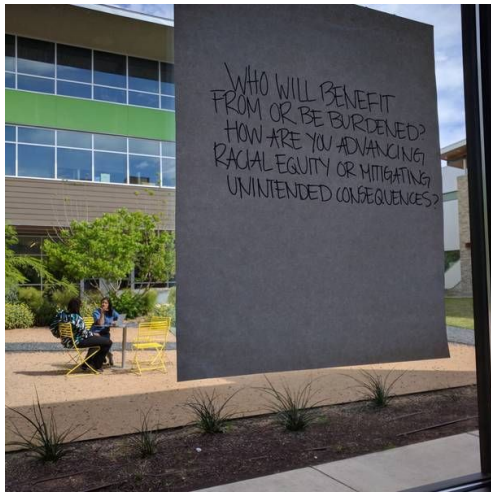
sense that people of color still do not feel that they can bring their full selves to work, and are still not thriving in Living Cities' culture. This was, it was argued, particularly true for women of color in leadership positions. Some felt that we were not being as clear as we should be about where we stand on these issues with partners and followers of our communication efforts. Some wanted to hear from leadership about what specifically our commitment to racial equity means in terms of values and action.

In 2017, the leadership of the organization, in response to staff requests, wrote and shared a vision statement for this work. A taskforce was charged with developing a workplan to move the vision into implementation. The **Racial Equity and Inclusion Learning Question Team** designed and administered a staff survey to understand staff competency to do racial equity and inclusion work. Now, in September 2017, a team has been formalized that is to hold the vision for racial equity and inclusion work at Living Cities and to support all teams and staff in operationalizing it. Operationalizing racial equity and inclusion is everyone's work at Living Cities.

This report is the capstone project of the **Racial Equity and Inclusion Learning Question Team**. It captures themes from the team's field and internal scan, as well as what we have learned from our grantmaking and investments in cities across the country--what we call *applied research*, and seeks to inform the next phase of Living Cities' racial equity and inclusion work. We also hope that this report might be useful to other organizations wrestling with how to better operationalize racial equity and inclusion in their own work.

Findings

Racial Equity Here (REH)



Racial Equity Here supports five U.S. cities committed to improving racial equity and advancing opportunity for all. Living Cities works with the [Government Alliance on Race and Equity \(GARE\)](#), a project of the [Center for Social Inclusion](#) and the [Haas Institute for a Fair and Inclusive Society](#), to provide technical support and coaching to the cohort of cities – **Albuquerque, Austin, Grand Rapids, Louisville and Philadelphia** – as they analyze how their operations impact people of color and devise actionable solutions.

As the cities were working to analyze their operations, we turned the mirror back on ourselves. We used GARE's framework as part of our internal efforts and adapted the employee survey that GARE developed for participating

cities to survey our own staff on how we are doing on racial equity and inclusion.

We believe that GARE's model of organizing local government is important in changing structural inequities. Working with leaders in local government (a mix of elected and non-elected government staff) gave us an opportunity to explore what it takes to operationalize racial equity in any institution as we learned that the lessons from the cities were very much relevant to our own work..

Insights from Racial Equity Here

- **There is a need for more tailored tools, especially around communications and evaluation.**
 - The city leaders who participated in the RH cohort appreciate the communications tools we curated and shared with them, however they feel that site-specific technical assistance is also required to be able to implement those tools.
 - Communicating about racial equity is an important skill to grow in city government. This applies to both internal and external communications.
- **This work is not just about changing policies and practice, but changing individuals' behavior so that people can make better decisions that lead to equity.**
 - Cities need to think about population-level outcomes and processes within government to achieve their goals (i.e Philadelphia's goal is to ensure that employees understand and are equipped to work on racial equity).
 - A critical mass of employees who understand why applying a racial equity lens to their work is required. There is a tipping point. This is why the Employee survey (aimed at understanding how competent city employees feel in terms of applying a

racial equity and inclusion lens to their work) and GARE's Train-the-Trainer model (by which city employees are trained on racial equity concepts and supported in becoming trainers themselves) are ideal.

- **It is crucial to think at the systems level and have leaders who can see the impact of structures on inequities.**
 - Understanding history and the current context of race in a city can help city governments get much more clear and granular about goals, actions, and performance measures.
- **Governments need to reframe how they think about community engagement and power.**
 - Cities can often respond with knee jerk reactions to people in their communities who already have power and know how to wield that power. This is why **inside and outside organizing** is an important framework. Inside organizing means engaging folks within city government while outside organizing often requires taking a backseat and listening to community needs and solutions rather than jumping to designing solutions.
 - A more transformational approach to community engagement would shift power. Normalizing conversations about community engagement, with a focus on why community voice is important means that city employees can get to better models of engagement and build more authentic relationships with community members..
- **Developing leadership for racial equity might look different than traditional leadership development.**
 - GARE is exploring different leadership models for racial equity. For example, what does it look like for city leaders to approach their work as servant leaders?

Insights from Living Cities' board meeting where GARE presented their progress and opportunities/challenges to the board as part of a conversation on how we can better partner with them as a collaborative:

- Leaders in philanthropy have different levels of understanding and depth of knowledge around systems change, institutional racism, and structural racism. This reflection from our conversations about race with the Living Cities board is substantiated by research such as that done by [D5](#), a philanthropic coalition aimed at making philanthropy more diverse, inclusive, and equitable in its practices. We are exploring ways to level-set with the Living Cities board through upcoming conversations and trainings.
- We need to do a better job of illustrating examples of institutional and structural change towards racial equity in cities. We are looking forward to partnering with GARE/CSI on a potential op-ed to that end. And, we are exploring ways to bring the board along on the journey with us. We have learned from conversations with other funders, such as the Kellogg Foundation, that it is very important to the sustainability of racial equity work that the board be able to set a mandate for the organization beyond the tenure of existing staff. "Our board set the mandate of being an anti-racist and then a pro-racial equity organization. That mandate makes us accountable," said Joe Scantlebury of Kellogg in an interview with the REI Learning Question Team.

- Our board has an aversion to what they call 'happy talk.' We need to consider seriously how to support our nonprofit partners so that they are better positioned to talk about challenges and failure. We must acknowledge how hard it is for nonprofit leaders to do this in front of potential funders. But, we look forward to exploring ways to strike a balance.

The Integration Initiative (TII)

TII is our multi-city initiative that supports cross-sector efforts in cities that are reshaping programs, policies and resource allocation to achieve enduring change that benefits low-income people. The insights that follow were gathered from conversations with and content developed by Living Cities staffers who work on TII.

Insights from The Integration Initiative

- **We have to talk about power dynamics when it comes to racial equity.** When thinking about philanthropy in place, how do we give philanthropic power (funding & metrics) to the community? Metrics should be more focused on returns for human beings rather than return on investment.
- **Measuring contributions to population change is challenging and often what shuts people down from exercising data discipline.** Given the way Living Cities works, it is nearly impossible to determine attribution so correlation and contribution are the ways to understand our impact. Nevertheless, we are working toward equity for people so regardless of the number or percent, if we aren't seeing equity, our work is unfinished.
- **Data disaggregation and a place-based lens are important but not the end game.**
 - We heard from seven leaders from Albuquerque on their perspectives on racial equity and inclusion in Albuquerque (and connections to national conversations). The importance of disaggregating racial data by ethnicity is especially relevant given the demographics of New Mexico. It is interesting to use New Mexico demographics as a lens to talk about beyond the Black/White paradigm and think through how diverse communities of color are. It was especially sobering to have Native folks share their stories and provided a reminder how much of the Native perspective is missing when we talk about racial equity.
 - Diversity without equity is not going to lead to more equitable outcomes: New Mexico has leadership diversity in politics but not in the private sector where the money and power are.
 - The Initiative Directors from all of the cities underscored the importance of considering race as well as ethnicity. For example, in Newark there is a large West African/West Indian population. Only looking at race is insufficient as the experiences of African Americans and Black immigrant populations are not the same.

Future exploration

- Explore how TII sites are building capacity for racial equity and inclusion
- Go deeper on San Francisco's model of racial equity, trauma-informed strategies as well as considering a reparations lens

THE STATE OF RACIAL EQUITY AND INCLUSION WORK IN THE FIELD

We conducted a field scan to capture what the philanthropic, public, and private sector fields are doing around racial equity and inclusion that helps us answer the following learning question: **“What does it take to apply/embed a racial equity lens to the work institutions are doing to get dramatically better results for low-income people?”** In addition, we aimed to identify new entities we can partner with to advance REI in the field; understand the power of networks for advancing REI in the field; build on [D5](#) Coalition’s “Analysis of Policies, Practices, and Programs in Philanthropy;” and synthesize our findings across sectors.

We looked at several surveys and a diversity of research in philanthropy, the social change field, the public sector and the private sector. Some organizations see racial equity as part of their diversity, equity, and inclusion efforts, whereas there are a few that focus solely on racial equity. For this reason, we are including research, landscape scans, and bodies of work on diversity, equity, and inclusion. For a list of organizations we connected with, field scans and surveys we reviewed, and conferences we attended, please see the [methodology](#) section.

Philanthropy/ Social Change Sector

In addition to D5 Coalition’s “Analysis of Programs, Policies, Practices to Advance Diversity, Equity, and Inclusion,” we reviewed a field scan commissioned by the Robert Wood Johnson Foundation on foundations who are advancing equity, as well as field surveys from Within Our Lifetime Network, and Building Movement Project.

These field scans and surveys either looked at how foundations and nonprofit organizations are doing equity work internally or the state of equity work in the field. We also connected with organizations who are doing racial justice work and racial justice funders. Here are some key findings:

In terms of how organizations are doing racial equity work internally:

- **Practice is lifted up more than policy.**
 - Many people we spoke to talked about racial equity and inclusion in terms of practice and programs, but not as much in terms of institutional or policy changes, which means accountability mechanisms and sustainable change strategies are lacking.
 - Culture change work is needed for racial equity to be embedded.
- **There is a difference between “personal risk” and “allyship.”**
 - To effect true change, we need to move beyond allyship by asking the question, “what risk am I willing to take on to advance racial equity?”
- **Leadership buy-in is key.**
 - At most foundations that focus on the work of racial equity internally, leadership buy-in is the most important factor (this includes Board leadership).
- **Racial equity work is a journey; not a destination.**

- Demographic data collection is key, as is baseline data.

Insights and Takeaways from the Field

- Most programs focus on diversity rather than equity, or even if they are thinking about racial equity, people don't name race.
- Developing a shared definition of "racial equity" is important, but can be a work avoidance tactic.
- Funding for racial justice organizations is limited, especially for movement work.
- Data disaggregation is important, but not many are doing it.
- We need a pipeline for diverse leadership in the philanthropic and nonprofit sectors.
- Intersectionality is the new buzzword, but few actually practice it.
- We need to talk about inherent power dynamics in philanthropy.
- Networks are important in changing the field.

Event/Conference	Key Takeaways	Related Content
<p>Othering & Belonging Conference by the Haas Institute for a Fair and Inclusive Society, April 30 - May 2nd, 2017, Oakland, CA</p> <p>Sessions attended:</p> <ul style="list-style-type: none"> Building a Transformational Women's Movement: Feminism at a Crossroads Workshop: Strategic questioning Racial Anxiety, Increasing Diversity, and Politics of Fear of the Other Bridging to Belonging: Galvanizing Movements The Stories We Tell About Who We Are: Race, Gender, Making American Politics 	<p>We need to interrogate the active ways in which we are truly taking personal risks to act as allies.</p> <p>We need to learn how to acknowledge and anticipate how racial anxiety shows up in our work.</p> <p>The importance of funding movements for true philanthropic solidarity</p>	<p>Post-conference notes</p>

<p>Asian Americans / Pacific Islanders in Philanthropy Annual Network Convening, May 19-20, 2017, Los Angeles, CA</p> <p>Sessions attended: High Net Worth Donors of Color: Are we the change we've been waiting for?</p> <p>Community Philanthropy Models: What Evaluations Show About the Impact of Collective Philanthropy and the Way Forward</p> <p>Exploring the future of Little Tokyo in the face of transit oriented development & gentrification</p> <p>Pop Culture Collaborative: The Power of Pop Culture Narratives to Drive Social Change</p>	<p>Importance of disaggregated data in terms of exploring wealth inequality came up again and again, especially in disaggregation of AAPI data.</p> <p>There is a lot that impact investing can learn from giving circles. We heard from Northwest Social Justice Funders on their giving circle model where members have equitable shares of power. Members are required to attend a two day race and class workshop</p>	<p>Color of Wealth in LA</p>
<p>Racism in Philanthropy: Effective Practices for Grantmakers Webinar by Schott Foundation [WEBINAR]</p>	<p>The dynamics in philanthropy are part of the problem, but to be paralyzed by that knowledge rather than impelled toward a solution is a misuse of privilege.</p> <p>We need to recognize the difference between charity and transformation: the latter is systems change and a much bigger beast; the former is built on the power dynamics we are trying to dismantle.</p> <p>Hiring with an REI lens has to mean more than hiring people of color from elite educational institutions if we want to hear lived experiences from people from the communities we serve.</p> <p>The board of a philanthropy should be representative of the communities we serve to include expertise from the ground.</p> <p>Language and frames are important but not when we allow them to delay us from doing work for people in the world.</p>	

[UNITY Summit](#) by CHANGE Philanthropy, September 17-20, 2017, New Orleans, LA

Sessions attended:

Grantmaking for Racial and Gender Equity: Why Intersectionality Matters

Want Answers for this Movement Moment? Look to the South (Empower)

Practicing Philanthropic Solidarity

Holistic Resistance: Healing Justice Across Movements

Equity Exploration in Process

Transforming Systems of White Supremacy in Philanthropy

If you are working for racial equity in America and you don't have a Southern strategy, you might have a problem. The South is where the battle for progressive values is most starkly being fought.

Tell the complicated story. Do not sanitize it. Martin Luther King was not popular among white people at the time. What are the stories of today that history will whitewash?

The Trump era is rewiring governance. We need to focus on local governance across many states and regions, especially the South, to counter that.

Philanthropy needs, now more than ever, to be in conversation, in solidarity, and in relationship with community organizers and the people who are putting their lives on the line for justice,

Philanthropy--stop creating collaboratives that are driven by philanthropy. Invest in community-led collaboratives and Black-led organizations. "Trust us to free us."

Black people have always been leading at the frontlines of social justice in America, and the Black movement for justice has always been multi-frontline and intersectional: LGBTQ, women's rights, reproductive rights, immigrant rights. Yet, there is an inadequate distribution of resources to Black-led efforts. This is a crisis of credibility in the social sector.

The things we do in private--our art and culture--creating gives us the heart to keep fighting. We need more investment in vital arts and culture work in support of social justice; not just big white art institutions.

Philanthropy needs to get serious about an external accountability structure. What would it look like for community to play that role?

In crisis, money goes to white-led organizations with illusion of scale. How do we shift this frame? We need a broader analysis to get funders on board on systemic issues.

[Black Social Change Funders Network](#)

[Project South](#)

[Gender Norms: A Key to Improving Outcomes among Young Latinas](#)

<p>Lower 9th Ward Living Museum Field Trip, September 21, 2017, New Orleans, LA</p>	<p>Systems that were very intentionally put in place to oppress Black people decades ago still manifest starkly every day and it is especially apparent in the Lower Ninth Ward -- from where relief efforts were focused after Katrina to the location of public schools and housing in New Orleans.</p> <p>Bias in media reporting after major catastrophic events impacts residents' own implicit bias (e.g. Black man depicted in headline as "looting" grocery store while white couple "found loaf of bread in grocery store").</p>	<p>Instagram post on Lower 9th Ward Living Museum</p>
<p>An Afternoon Talk with Kimberlé Crenshaw on Intersectionality, September 24th, New Orleans, LA</p>	<p>The Intersectionality framework was started by a Black woman to address systemic failures in the lives of Black women who are often erased from the narrative. However, intersectionality has become a "trendy" buzzword that ironically continues to erase Black women.</p> <p>In terms of critiques of "oppression olympics" the framework of intersectionality allows you to look at the most marginalized folks in society, so your responses will address systemic inequities.</p> <p>We need to look at what happens when we fail at intersectionality</p>	<p>Kimberle Crenshaw's paper on intersectionality</p>

Public Sector

Much of our research on programs, policies and practices in the public sector built on the work of our Racial Equity Here cities, The Integration Initiative Cities, and the Government Alliance for Racial Equity. In addition to the insights from Racial Equity Here, we also had the following findings from attending convenings and conferences.

Additional Findings:

- Data on real disparities in cities can be a catalyst for change.
- Diversifying procurement (diversity programs in government contracting) can unintentionally only favor white women instead of businesses owned by people of color.

Event/Conference	Key Takeaways	Related Content
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<p>Government Alliance on Racial Equity Member Convening, May 2-3, 2017, Oakland, CA</p>	<p>Building leadership for racial equity</p>	<p>Materials from GARE Member Convening</p>
<p>SXSW Panel: Making a Place for Equity in Michigan” which featured Mayor Bliss from Grand Rapids, Darell Rose (James Chapman (Rock Ventures), April Boyle (Build Institute) and Pamela Lewis (New Economy Initiative).</p>	<p>Real data on disparities became a catalyst for action in Grand Rapids</p> <p>When a position opens on boards & commissions, ask whose voice isn't being heard</p> <p>Opening capital opportunities for communities of color is not about talent but networks.</p>	<p>SXSW Storify</p>
<p>SXSW Panel: Five Cities are Eliminating Racial Inequity, You Can Too”, moderated by Nadia Owusu and featuring Glenn Harris from The Center for Social Inclusion and Mayor Richard Berry from Albuquerque.</p>	<p>Municipal operations affect communities & can reproduce inequities.</p> <p>Leadership is important, so are networks</p> <p>GARE's model of internal organizing is key</p>	

Private Sector/Impact Investing

“The worst pathology of white privilege is entitlement.” - Antony Bugg-Levine, Nonprofit Finance Fund

“Impact investing attracts people who misunderstand power and policies.” - Andrea Armani, TransformFinance

“Black and Brown people administrate, but we don't allocate.” - Donray Von from Castleberry & Co

Key Findings:

- **Diversity by itself does not lead to more diverse and equitable investments, which is why there needs to be an intentional focus on equity.**
 - While diversity by itself is not justice and is not equity, we heard from organizations focusing on internal diversity and how that impacts their investments. One example is Jessie Smith Noyes - transitioned from family foundation to a more diverse board and tracking grantees' demographics while doing the work internally. They also do [“social justice investing.”](#)
 - Small firms like Red Stone Equity and Castleberry & Co are **approaching the internal conversations at the individual level because of the size of their firms and who's part of the leadership.**

- Community investing versus impact investing and how people might focus more on "environmental" impact vs. a "people" impact. **People are more comfortable in thinking about impact in terms of the environment as opposed to people.**
 - When only focusing on diversity, we are so focused on counting that we impose people's identities on them.
- **The role of CDFIs as "impact investors"**
 - Nonprofit Finance Fund and Opportunity Finance Network are working within their organizations and networks to increase racial and gender diversity. Both of them see the need for CDFIs to continue to be in the same room with impact investing.
- **Need to break away from defaulting to the "easy way to do things" and commit to the hard and messy work.**
 - Nonprofit Finance Fund makes equity and inclusion real through four levels: **operational health, client delivery, influence and human capital.**
 - This work is hard, but there is a need to acknowledge that the difficulty of doing racial equity work is because of the **legacy of institutional and systemic racism.**
 - CDFIs are committed to conscious actions, **but don't think about unconscious bias.**
 - If you do this work in a real way, people will be forced to **deeply interrogate what they believe the world looks like.**
 - **Networks are important** : Access to a network of people working on the same thing in their organizations is important.
- **Leveraging Impact Investing/Social Finance for Systems Change**
 - Impact investing is small unless we're using it as a lab to lift up learning. We need to recognize economic justice = racial justice, and racial justice needs economic justice. We also need to talk about the role of wealthy families in terms of how to transform investing. **One way to dismantle structural racism and implicit bias is to focus on dismantling the barriers that fund managers of color are facing.**
 - When making the business case for racial equity, it is important to remember how easily that could take away from systemic change.
- **Now that we're talking about race how do we convert that into better results for low-income people, particularly those of color?**
 - These conversations are not new. People of color have had these conversations almost all of their 20 - 30 year career. Yes, there's been progress, but in this work, the cycle always has to start with "Making the business case for diversity, equity and inclusion" and sometimes that's where it stops.
 - Through our impact investing, Living Cities invested in one of the efforts mentioned, the New Economy Initiative in Michigan, which Demetric Duckett led to closing in May. LC is lending \$1 million to the Detroit Community Loan Fund that is supporting the New Economy Initiative's test of the viability of "character-based" lending in the Detroit metro area. More learnings to come as we get quarterly reports from the Detroit Community Loan Fund.
 - Being explicit about Living Cities' focus on race equity with [Propeller](#), as an impact goal, was helpful. In response, Propeller offered to expand the pool of eligible borrowers to include sourcing from a place-based program that focuses on entrepreneurs of color. If the fund deliberately targets entrepreneurs of color, our

monies will be combined with others' to achieve this goal (since we are lending to a fund that aggregates monies from multiple sources).

Event/Conference	Key Takeaways	Related Content
<p>Who Benefits? NYU Symposium on Diversity and Inclusion in Social Finance, April 21, 2017, New York, NY</p>	<p>At the city level, we heard from Wendy Garcia, the Chief Diversity Officer at the Office of the NYC Comptroller who works in increasing contracting opportunities for women and minority-owned businesses.</p>	<p>Making the Grade Report on NYC Procurement efforts Recognizing the Results - The Financial Returns of NAIC Firms: Minority and Diverse Private Equity</p>
<p>SXSW</p>	<p>A lot of equity focused conversations in tech & social impact are still very much focused on diversity and not equity. Without understanding that diversity is a means to equity, tech companies are still just focused on numbers and not impact.</p>	<p>The Case foundation's Impact Investing Map</p>
<p>Echoing Green All Fellows Conference, November 16, 2016, Atlanta, GA</p>	<p>Leaders need to be truly honest to truly disrupt, They must be willing to gain wisdom from others, find allies, break culture of "niceness," and be humble. How do we get from the desire to do good to be a good partner to elevate the ecosystem? How do we honor communities in our work? My Brothers' Keeper was used as an example of coordinated effort and resources to move the needle.</p> <p>Social entrepreneurs brought up the tension of how to keep mission first vs. company first, and got some pushback from community-oriented groups on how we need to shift our thinking beyond profit motives. It was a good conversation, with both sides acknowledging the reality that we live in and that we have to balance urgency and long-term outcomes.</p> <p>Entrepreneur readiness vs. investor readiness: Is there a consensus in the impact investing communities on outcomes and measurement? Entrepreneurs brought up that there are entrepreneur readiness</p>	<p>Echoing Green Fellows 2016 Attendees Echoing Green Fellows Demographic Data</p>

	<p>workshops and courses, but what about training investors around impact investors?</p> <p>Social impact efforts in community don't have the validity needed to attract impact investors.</p> <p>Kathryn Finney from DigitalUndivided is using power and innovation to create wealth with Black and Latino communities: change perspective of "not poor enough" but not "Tech VC-ready."</p>	
<p>Employing Innovation & Impact Investing to Build Black Business a Roundtable with Investors, September 17, 2017, New Orleans, LA</p>	<p>Important to have a network strategy to connect entrepreneurs of color</p> <p>Living Cities' capital innovation work, in providing proof points for the field, is important, especially in pushing the field on race equity</p>	<p>Tapestry of Black Business ownership in America</p>

Future opportunities:

- How can our impact investing team have racial equity targets embedded in financing agreements
- Explore TransformFinance's racial justice work more deeply
- Connect with ABFE's work on Black Business ownership
- Explore how the private sector can move into the equity space and go beyond diversity

INTERNAL STAFF SCAN FINDINGS

Staff Interviews

Some of the **key themes** that emerged as a result of interviews with our staff were:

The importance of applying an REI lens for our programmatic outcomes. Staff stressed the importance of racial equity to all of our projects in achieving our outcomes related to jobs, income, and wealth with closing racial gaps as a focus.

The tension between an individual focus and an organizational focus on racial equity and inclusion. Interviewees discussed the barriers to doing racial equity work consistently with no organizational policy in place to support risks taken in applying a racial equity lens. Regardless of individual competency and intention, organizational support is needed to advance racial equity.

The need to level-set due to frequent staff turnover. Staff members interviewed stressed the importance of repeated level-setting given the introduction of new staff into our organization on a frequent basis. A focus on racial equity can only be carried forward if all staff are on the same page about principles of racial equity and inclusion.

Understanding the difference between applying an REI lens and working on an REI

initiative. Staff underscored the importance of distinguishing between what it means to be working on a racial equity initiative as compared to applying a racial equity lens on all of our initiatives.

The importance of remembering we don't live in a vacuum. Despite our efforts to advance racial equity in our organization and our projects, we cannot forget the forces of institutional and systemic racism at play inside and outside of our walls. Living Cities does not constitute or control the whole country, and we must remain aware of these pervasive forces in the landscape of the country.

This set of interviews was a key input for the creation of a staff survey administered to establish a baseline of staff competency in applying a racial equity lens to the work of our organization. Having a record of this baseline data will provide an accountability mechanism for our organization as we work to further our staff competency around advancing racial equity.

Survey Contents

For a list of the questions, [see here](#).

Staff Racial Equity and Inclusion Competency Survey Findings

On August 8, we administered a survey to all staff (including interns) to reflect on their individual competency as related to understanding and advancing racial equity. The survey was designed by Hafizah Omar, with feedback and input from Nadia Owusu and Ratna Gill. The questions from this survey were adapted from GARE's Employee Survey for Local Governments, D5 initiative's Field Survey, and additional best practices from the field.

The survey had a 97% completion rate, with only one staff member choosing to opt out. Staff were thoughtful and thorough in completing the survey, with open-ended answers receiving, for the most part, long and detailed responses. Three survey respondents chose to skip the majority of the questions in the survey, answering only a few questions at the start and a few questions at the end of the survey.

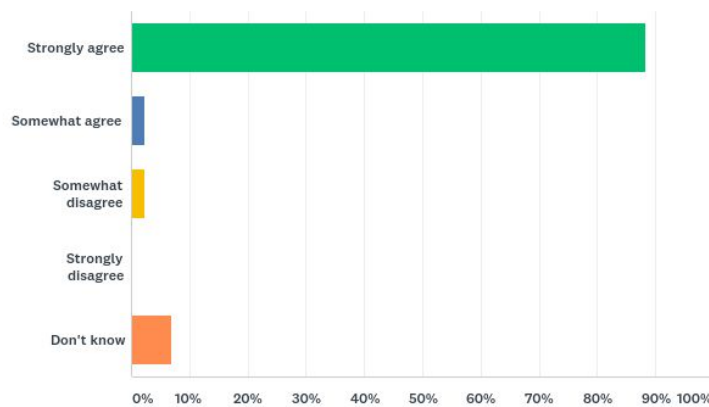
A number of themes emerged on the basis of the survey surrounding existing staff competency, perceptions on importance of racial equity work, comfort level with discussion of advancing racial equity in our work, etc.

Staff believe it valuable to examine and discuss the impacts of race on our work

at Living Cities. 91 percent of staff surveyed said that they agreed that discussing racial inequities and their impact on our work is important and valuable. This signifies that **staff members are ready and willing to engage in a series of conversations and trainings around racial equity**, and is a

bright sign for the future of this work.

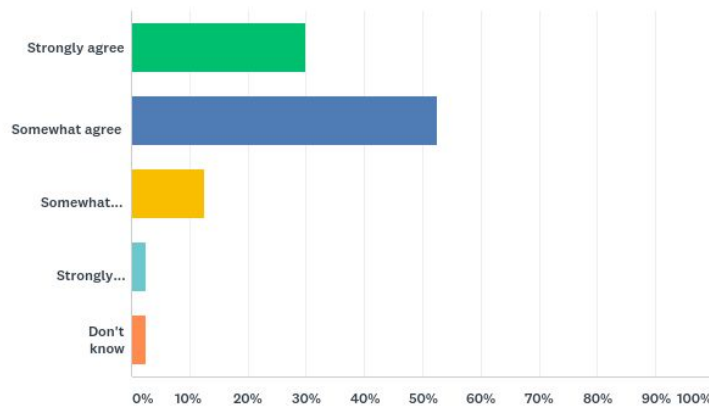
Q5 I think it is valuable to examine and discuss the impacts of race on our work at Living Cities.



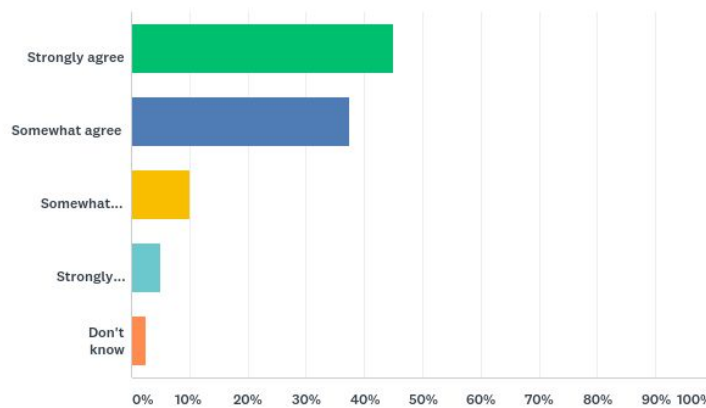
Staff are comfortable discussing the impacts of racial inequities at work. 82

percent of staff surveyed feel comfortable talking about race, and 85 percent feel comfortable when their colleagues talk about race. We have treated staff discomfort as a barrier to discussing issues of racial equity in the past, but is evident that a clear majority of staff is in fact ready and willing to engage in these conversations. **Our energy can be redirected from managing for the discomfort of the few toward striving for the engagement of the many.**

Q13 I feel comfortable talking about race.



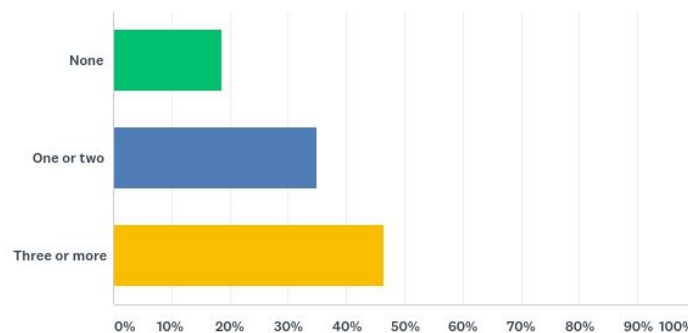
Q14 I am comfortable when others talk about race.



Most staff are well-versed in basic principles of racial equity and/or anti-racism.

80 percent of staff surveyed have completed one or more racial equity training(s). 50 percent of staff surveyed have completed three or more racial equity trainings. 80 percent of staff found the trainings useful, corroborating **evidence that good tools for learning about racial equity exist**. 92 percent of staff agreed that they understand concepts related to racial equity and inclusion. There is strong evidence that a staff-wide introductory training is not needed, and that rather **we can focus on providing differentiated training opportunities and other resources for staff members with varying levels of competency**.

Q1 How many trainings / workshops about racial equity have you attended either at Living Cities or outside of Living Cities?



Staff are less comfortable identifying instances of institutional racism.

While most staff were comfortable identifying examples of interpersonal and structural racism, 25 percent of staff somewhat or strongly felt that they were not comfortable identifying institutional racism. As a systems change organization with the mission of closing racial income and wealth gaps, the lever that we pull is one of institutional change. If staff cannot identify instances of institutional racism at play, that presents a major barrier to our ability to drive impact and achieve results for people.

Staff are already working to apply a racial equity lens within their teams. 77

percent of staff surveyed reported that they are already actively involved in advancing racial equity in their projects and teams. This suggests that **even before the introduction of institutional norms, direction, and commitment, there already exist numerous champions of advancing racial equity in the organization.** Providing the right tools and framework for staff is sure to only bolster this commitment.

A subsection of staff feels that they have risked their reputations to talk about race at work. 75

percent of staff surveyed reported that they have often set aside their own discomfort and fear of saying the wrong thing when talking about race at work. The rest of staff said they have never/seldom done so. **This suggests that our organization needs to invest thought and resources into supporting the 75 percent of staff that takes on a perceived risk in order to be able to further this work.** 20 percent of staff also identified that they would become more active in advancing racial equity if they received due acknowledgment for this work, suggesting one way of supporting them. **What are we doing to honor the experience of the fight to advance racial equity, and to recognize what has been risked and lost in the process to get us here where the majority of staff members are now comfortable talking about race?**

Leadership conversations about racial equity are seen as general and exclusive.

While the majority of staff members perceive Living Cities leadership as participating in internal conversations about racial equity, several staff members voiced that they see these conversations as not being specific or inclusive enough. **“When there is pushback in a large group setting about not seeing a racial equity issue at play, we have not historically spent the time to discuss, dig deep, and move that conversation forward with history, context and a complete understanding,”** said one staff member. Another one said, “I think we talk about racial equity as a whole but when staff has raised specific incidents they want addressed due to perceived racial inequities, staff hasn’t seen those addressed/acknowledged.” There was also some concern raised as to who is able to participate in those conversations: “Yes, but it’s often not an open conversation where a broad group can contribute.”

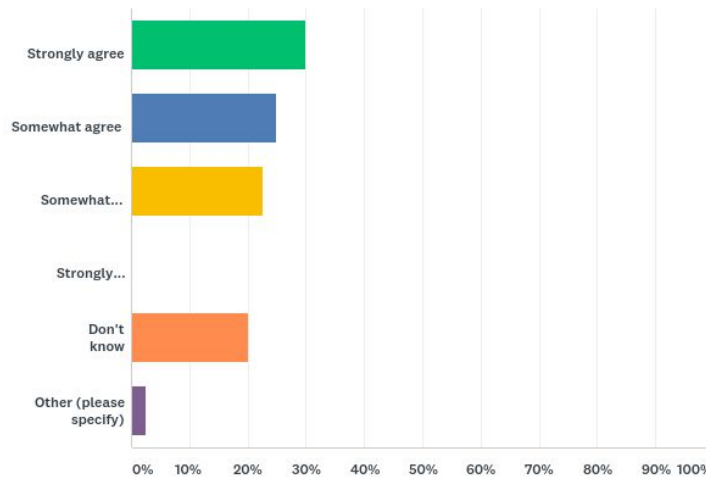
Significantly more staff believed that we are working to decrease inequities externally than internally. 87

percent of staff members surveyed agree that Living Cities has taken steps to reduce inequality generally, while 65 believe that Living Cities has taken steps to reduce inequality internally. **This suggests a conflict as we should not be instructing others on how to advance racial equity without addressing disparities within our own “house.”**

Staff is split on whether Living Cities creates equal opportunities for all to advance.

Whereas responses were largely clustered on other questions, the question about perception of equal opportunities to advance within the organization was largely split.

Q29 Living Cities creates an environment where everyone has equal opportunities to advance.



There is a need for a clear procurement policy and adjusted budget allocation toward equitable procurement to minimize risk for the person procuring a good/service.

One staff member said, "When it comes to procurement it needs to be understood that cheaper is not always better. Black-owned businesses face steeper costs due to trying to start up with a lot of red tape, so trying to purchase from them with the currently allotted budget can be frustrating. We talk about supporting people of color, but often, the cost makes us avoid doing so."

Qualitative Findings

The following comments were also made by staff in the open-ended portion of the survey.

Staff Composition

"All the highest positions are held by white staff. The culture/language used is pretty aligned with white institutional corporate culture, though certainly more open to innovation and evolving."

"From my perspective it does seem like that majority of black women within the organization are concentrated in administrative roles."

Values/Culture

"I think that accountability to our values seems to be inequitably "enforced" if you can call it that: in my observation, there is much more leeway or grace given to white staff who may not be living our values than to staff of color."

"There are elements of our culture that appear notably influenced by favoritism, preference, and priority that may contribute to inequitable outcomes for various classes of staff, including people of color. There are times and ways in which it can appear that we use selective lenses to solicit participation and/or feedback based on who we currently favor."

"When some white leaders have not modeled behavior in terms of our values (e.g. Yelling at people, not working collaboratively, not sharing what they are learning, refusing to do things in the way that the leadership team has decided), patience for this behavior can sometimes seem much greater than if a person of color exhibits these behaviors. When a white leader does it, it is sometimes seen as a bad 'action' and we work to figure out how to put them in a position to succeed despite it. When a person of color does it, it sometimes seems as though we think that the person rather than the action is bad, and less effort seems to be made to support them in making changes."

Hiring

"Some of our hiring practices contribute to inequitable outcomes (or at least opportunities) for staff of color. For example, working with On-Ramps (the majority of who are white women) limits the candidate pools to people who are in their networks as opposed to a talent search firm owned/managed by a person of color. Similarly, putting in certain job requirements/credentials assumes that experience and expertise is only gained through formal credentials (e.g. graduate degrees) from institutions that largely privilege white applicants."

"In our hiring, when evaluating candidates, I have heard managers use coded language that favors white candidates based on things like appearance, education (what schools), and voice ("articulate")."

"Thought exercises, while helpful in the hiring process, take a lot of time and energy, which may impact lower-income individuals, if not people of color."

Advancement

"There have been instances where staff members achieved their objectives but were not given the opportunity to advance while others did not achieve their objectives and were advanced. The system used to categorize and classify has not been implemented consistently, equally or transparent across the organization."

Budget

"Project managers/leads aren't given authority over their budgets, and the authority rests in the hands of CEO/COO/Director of Admin, who are all white."

"Many staff of color and some white staff put in the extra time to consider how to do contracting, procurement, and facilitation with an REI lens, while some white leaders do not, yet are not held accountable for it despite it being mission-critical and a core value."

Recommendations for future survey iterations:

- Our recommendation is that this survey be administered every year.
- We recommend that future versions of this survey collect demographic data.
- We recommend that future versions of this survey have a question reflecting each staff member's current level in the organization (e.g. Leadership, Associate, Administrative etc.).

Members of the REI Learning Question Team also participated in the following trainings:

Implicit Bias Training

Two members of our team participated an implicit bias training as part as the NYU Social Finance Symposium.

Racial Equity and Liberation

In the Spring of 2017, Move to End Violence faculty [Monica Dennis](#) and [Rachael Ibrahim](#) hosted a powerful 6-week virtual learning community on [Racial Equity and Liberation](#) that explored the following practices: Locating Oneself, Expanding Narratives, Moving Beyond Single Stories, Choosing Vulnerability, Identifying Systems Power, Levels of Racism, Community Reflection. Each week included pre-work and a 60 minute webinar. This will be available as a self-directed course in early summer 2018.

Undoing Racism Training by the People's Institute for Survival & Beyond

- "Through dialogue, reflection, role-playing, strategic planning and presentations, this intensive process challenges participants to analyze the structures of power and privilege that hinder social equity and prepares them to be effective organizers for justice."
- NYC Department of Public Health staff did 50 hours each of Undoing Racism. They recommended that we take a look at The Perception Institute for Anti-Racism Training.
- Team member's takeaways on Undoing Racism:
 - The history of structural racism and the creation of race as a social construct was powerful and compelling.
 - The trainers could have been more sensitive about incorporating an Asian-American voice that already often feels unseen and unheard when this sentiment was raised.
 - The facilitators could have made different choices about when to *tell* and when to *ask* about what people have experienced.

Racial Equity Institute Training

- Racial equity training specifically for practitioners in conversation with community. Attended by Nadia Owusu as part of her participation on the IOBY Board of Directors, this training provided food for thought about how Living Cities can have better and deeper conversations with communities, including cross-sector leaders in cities and the communities they serve. The training brought together foundation staff, CDFI staff, nonprofit staff, business owners, and community members in Cleveland to talk about how all actors can work together and hold different pieces of a collective strategy to create economic opportunity in Cleveland for communities of color. The training provided additional evidence that there is great potential for transformation when communities are on a journey together. All participants at the training Nadia attended had already been through a 101-level training together, so they had a shared vocabulary and a strong sense of the history of racism in America and about what that has meant for Cleveland in particular.
- Some additional takeaways from the training are:
 - Inequity perpetuates itself by weakening public trust and undermining popular support for power and resource distribution.
 - To effect lasting change, we have to look at racism not as a matter of love vs. hate, but rather as a system of power--of doling out privileges and denying them.

Compass Point Organizational Equity Leadership Development Program

- Funded by the Kresge Foundation, this cohort-model program is designed to help organizations center equity in everything they do. Living Cities is represented in the cohort by Elodie Baquerot, Matt Smith, and Nadia Owusu. Thus far (as of October 2017), this team has participated in a 2-day training and workshop, been assigned personal “equity coaches” and shared learning with our assigned learning partner organization, the Urban Institute. The team has also developed a workplan.
- Some key takeaways from the engagement thus far are:
 - Operationalizing racial equity requires a focus on changing hearts and minds because what is going on in people’s hearts and minds leads them to make choices or not.
 - White institutional culture works in such a way that it renders itself invisible. Because it is seen as the “norm,” people are made to either conform to it or be measured against it.
 - Liberatory design thinking can shake up ways of working that are grounded in white institutional culture and help move organizations to a more equitable practice.
 - For much more, see here:
<https://www.compasspoint.org/kresge-org-equity-resources>

In November 2017, all three members of our team will be attending [Fundamentals of Facilitation for Racial Justice Work](#) with the [Interaction Institute for Social Change](#).

Themes across trainings:

- We cannot just rely on one-off trainings. Racial equity is a practice and we need more trainings to sustain this as a daily practice for staff.
- There are tools and frameworks out there (adaptive leadership, RBA, design thinking) that we can adapt for advancing racial equity.
- Who the trainer is very important. If Living Cities decides with an institution for trainings, there should be intentional conversations with the trainers to ensure that they will fit with our organizational needs.
- There are a lot of tools and resources out there, but we need to build in time to practice using tools.
- Experiences together can be really powerful.
- We need a shared understanding of the history of racial inequities in America.

Takeaways & Recommendations from Overall Racial Equity Learning Process

We need to treat racial equity as a real competency and skill.

From across all of our activities, it is clear that achieving racial equity and inclusion **requires a set of informed policies and practices intentionally designed to promote opportunity equitably and to rectify disparities**. The implementation of these practices and policies and the ability to identify instances of interpersonal, institutional, and systemic racism requires skills and competencies including but not limited to the following:

- Comfort and fluency around speaking about what REI means at Living Cities and in the world, including ability to **identify, discuss, and confront interpersonal, institutional, and systemic racism**.

- Understanding **the role that racial equity plays** within your projects and Living Cities' broader portfolio.
- Ability to **interrogate your own personal biases and worldview**, and to modify your own behavior on a daily basis based on that interrogation.
- Deep **understanding of the history of racial inequity in America**, including around the idea of race as a social construct and the ways that, throughout our history, systems were designed that isolate and separate us, and that empower a select few—based on the invention of race—with the privilege of innovation, creativity, and power.
- Comfort with making oneself vulnerable at work internally and externally with partners based on the **understanding that racial equity work is personal** and that we are all learners.
- Understanding of how to **apply a racial equity and inclusion impact assessment tool** in decision-making.
- Ability to effectively **facilitate difficult conversations about race** toward achieving impact.
- Ability to **set racial equity outcomes, goals, and performance measures**.
- Engagement in **community organizing and community-led** efforts.
- Ability to write with nuance, clarity, and humility about racial justice topics.
- Ability to **critically examine social issues and messages for racial biases and inequities** and their impact on oneself and others' thinking, emotions, and behaviors.
- Understanding **relevant amendments, laws, regulations, and policies** (e.g. 14th amendment, Federal Indian Policy, immigration policies, criminal justice and policing policies)

The Racial Equity and Inclusion Learning Question Team recommends that Living Cities:

- Adopt racial equity and inclusion as a core competency for employment.
- Evaluate candidates for employment in part based on their racial equity and inclusion competency.
- Create a competency framework that includes prioritized competencies and skills (including from the list above and from the resources in this report) so that all staff have clarity around the organizational definition of racial equity and inclusion, and so that they can measure their own progress and work with their people managers towards improving their skills and competencies.
- Provide multiple opportunities/offerings for Living Cities staff to build racial equity and inclusion skills and competencies. These might include individual coaching and training, all-staff conversations and training, conversations and trainings in conjunction with community, and time for self-reflection. All staff should, at a minimum, attend a 101-level training about the history of racism in America by the end of 2017.
- Make articulating a racial equity and inclusion objective mandatory for all Living Cities staff.
- Ensure that organizational leadership is working towards high levels of competency in this area, with some members of the leadership team moving towards a “mastery” level as defined by the competency framework.
- Set up accountability mechanisms and systems of rewards so that all staff, regardless of race, are held accountable for racial equity and inclusion competence, and so that those who are performing well in this area are rewarded for that work.
- Assign people to work on projects in roles that reflect their REI competence and skills, acknowledging that some teams require higher levels of competence and skill in this area, just as, for example, people with investment backgrounds are placed on teams with emphasis on investing capital.
- Create a train-the-trainer model so that initial investment in outside training/facilitation/coaching can be brought in-house over time.

Tools and Resources:

[Building a Leadership Framework for Racial Equity](#)

[Emerging Practitioners in Philanthropy "Measuring A Leader" framework](#)

"Embedding" a racial equity and inclusion lens has to be an overarching framework in every aspect of our work.

To many people, advancing racial equity and inclusion can seem like a daunting task. They do not know where to start or what it means to "apply a racial equity and inclusion lens" to social change work. Yet, there is a definition of what this means that has been commonly embraced in the field, and indeed is reflected in our own definition of our racial equity and inclusion work. That definition asserts that organizations must incorporate racial equity and inclusion at every stage of the work and at all levels: personal, team, and institutional. Tactically, this can be as simple as:

1. Pausing to reflect on the racial equity and inclusion implications as we make decisions, and,
2. Engaging in candid and authentic conversations about race so we can surface blind spots and hold each other accountable to our values and norms.

The Racial Equity and Inclusion Learning Question Team recommends that Living Cities:

- Introduce and hold project teams accountable to using and being able to share how they used a racial equity impact analysis tool for decision-making that asks the following questions (this should be operationalized similarly to how we have operationalized the BAR/AAR process):
 - Are all racial/ethnic groups who are affected by this policy/practice/decision at the table?
 - How will the proposed policy/practice/decision affect each group?
 - Does the policy/practice/decision worsen or ignore existing disparities?
 - Based on the above responses, what revisions are needed in the policy/practice/decision under discussion?
- Design and implement an audit tool that takes stock of all Living Cities work through an REI lens so that staff can practice applying this lens in an applied way.
- Develop a set of norms and agreements for staff to engage in candid and authentic conversations about race without losing a sense of psychological safety.

Tools and Resources:

[Racial Equity Toolkit: An Opportunity to Operationalize Equity](#)

[Working with Communities to Advance Racial Equity and Eliminate Disparities](#)

It is important to approach racial equity and inclusion work through a systems change frame.

Working for racial equity means **dismantling systems of social structures that produce and reproduce cumulative, durable, inequitable results**. These systems mean that it is not necessary to have explicitly racist actors to see inequitable results. **Focusing on individual instances of racism can have the effect of diverting our attention from the structural changes** that are required in

order to achieve racial justice. Through our activities and research, it is clear that we need to explicitly and implicitly challenge all manifestations of racism and racialization in our work and in our organizations. Too often, we hear people say things like, “How can that police department be racist when its leader is Black?” or “Why didn’t the Obama presidency mean that racism is over?” The answer to these questions, of course, is that changing individual leaders does not automatically lead to systems change. For that to happen, not only do those individual leaders have to **commit themselves to applying a racial equity and inclusion lens** to their work and to working at the systems-level, but they have to push and support other actors within their institutions to do the same. For example, through Racial Equity Here, we are supporting the training of thousands of city government staff to build racial equity and inclusion competency so that they can in turn train others and making more decisions and policies with a racial equity and inclusion lens.

The Racial Equity and Inclusion Learning Question Team recommends that Living Cities:

- Works to deeply understand the systems that most affect the life chances of low-income people of color through a series of readings, experiences, and trainings.
- Works to deeply understand the ‘Organize, Normalize, Operationalize’ framework developed by the Government Alliance on Race and Equity that holds that we must normalize conversations about race, operationalize new behaviors and policies, and organize to achieve racial equity.
- Develop a shared definition of the systems we are trying to affect and the actors that make them up, particularly in terms of creating jobs, income, and wealth for low-income communities of color.

We must approach our work with an understanding of place and local context, but acknowledge that inequities are everywhere and systemic.

Throughout our interviews and conversations, we were struck by how national actors often disregard local context while local actors often argue for the primacy of place while ignoring shared history and the fact that racialized inequities exist everywhere, so there is much that can be learned and adopted/adapted across places.

The Racial Equity and Inclusion Learning Question Team recommends that Living Cities:

- Continue to push ourselves to consider local context and to share emerging themes and promising practices across places.
- Deeply listen to local actors to ensure that we are not missing nuances.

Remember that data matters, but only in service of outcomes.

In our work, we noticed a great emphasis on data, which is exciting because we know that it is a necessary and powerful tool, but to use a common metaphor, data should be used a flashlight, not a hammer. Often, when it comes to using data for racial equity, it is used to highlight the “failings” of individuals rather than of systems. And, there is a widespread belief that data is neutral, when in reality we know that they are not. For example, algorithms that harness data to help with hiring decisions have been found to have the biases of the people who created the algorithms embedded in them. Disaggregating data by race is key for practitioners working on issues of poverty and

inequality, but we need to do a better job of communicating what that data tells us about systems and about the policy and programmatic implications.

The Racial Equity and Inclusion Learning Question Team recommends that Living Cities:

- Continue to move towards requiring grantees and borrowers to disaggregate data by race.
- Invest in increasing staff competency around data analysis, data storytelling (particularly about systems change), and data visualization.
- Develop a practice of capturing community voice in data collection to ensure a balance of qualitative and quantitative data.

Tools and Resources:

[Demographic data and policy research on Asian American and Pacific Islanders](#)
[Taking Data Apart: Why a Data-Driven Approach Matters to Race Equity](#)
[D5 Coalition resources on demographic data collection](#)

We all must be able to effectively communicate about REI.

How we talk about race matters. Historically, racial inequities were intentionally created. We must now be even more intentional as we dismantle racial inequity, using a common shared understanding of institutional and structural racism. Yet, many people find that communicating about race and structural racial inequities is a challenge. From our research, we see that it doesn't have to be. There are many best practices grounded in decades of research and practice. Indeed, through Living Cities work on Racial Equity Here, we have curated a lot of that research and some examples into a racial equity communications guide for public sector practitioners. Many of the strategies and concepts are adaptable and adoptable for other sectors.

The Racial Equity and Inclusion Learning Question Team recommends that Living Cities:

- Consider the 'affirm, counter, transform' framework for internal and external conversations about race. (See the Racial Equity Here communications guide).
- Work to be explicit about race in a culture of hiding racial inequities behind other words..
- Leverage data whenever possible in our communications (internal and external) about race, but not at the expense of stories. In the end, it is people's real lives that we hope will change for the better as we undo systems that created our historical and current inequities — stories tell us about the tangible impacts of these inequities and possible paths toward a more equitable future.
- Adopt a practice of communicating about race that stresses values ("all men are created equal"), realities ("all men are created equal" as expressed by Jefferson referred only to white male property owners), and aspirations (we strive to make "all men are created equal" not just a value but a truth that we are willing to work hard to live in how we live, work, and engage).
- Ensure that everyone at Living Cities understands and can define key terms related to racial equity (see glossary in Racial Equity Here communications guide).

Tools and Resources:

[Affirm, Counter, Transform](#)
[Ten Lessons for Talking About Race, Racism and Racial Justice](#), Opportunity Agenda

Communications Guide for Racial Equity Here Cities, PROVOC (Coming soon!)

Two specific examples of mayors talking about racial equity using tools that GARE and PROVOC has offered:

- Mayor Fischer's [speech](#) is a great example of Affirm, Counter, Transform
- [Mayor Bliss's blog post](#)

We cannot advance racial equity until we focus on anti-black racism and intersectionality.

"Two hundred fifty years of slavery. Ninety years of Jim Crow. Sixty years of separate but equal. Thirty-five years of racist housing policy. Until we reckon with our compounding moral debts, America will never be whole." --Ta-Nehisi Coates

It is important for those working on economic inequality and other social issues to focus on anti-Black racism because it is the root cause for the inequity we see today. Indeed, it is clear that we will not achieve economic equity for all people without addressing it. In other words, in America, Anti-Black racism is the foundational architecture for the strategies, tactics, tools, and cultural worldviews that created and maintain racial oppression, repression, and exclusion. It is also true that these same strategies, tactics, tools, and cultural worldviews are being used against other communities, including Latinx communities, Asian and Pacific Islander communities, LGBTQ communities, and women. So, it is important to start with an understanding of anti-Blackness, and to then apply an intersectional analysis and lens to ensure that the unique experiences of other communities, and of individuals all of us whom necessarily sit at the intersection of ,multiple identities, are not being erased.

The Racial Equity and Inclusion Learning Question Team recommends that Living Cities:

- Includes in its racial equity and inclusion learning curriculum, readings, speakers, and media about why considering anti-Black racism is fundamental to achieving racial equity and inclusion, and about intersectionality.
- Engages in conversation with our sites, such as New Orleans, San Francisco and Baltimore, that are centering anti-Black racism in their work to understand what that looks like in local efforts.
- Invest in Black-led social change efforts and partner with Black-led organizations.

Tools and Resources:

Code 20140 on their [approach](#) to Race Equity Work and focusing on Black and Latinx People
[Mapping the Margins: Intersectionality, Identity Politics, and Violence Against Women of Color](#),

Kimberle Crenshaw

[The Case for Funding Black-Led Social Change](#)

Wealth Inequality and AAPIs, AAPI Nexus, UCLA Asian American Studies Center

[Confronting Anti-Blackness in Our Communities](#), Brown and Proud

[Ten Tips for Putting Intersectionality into Practice](#), Opportunity Agenda

To talk about race, we have to talk about inherent power dynamics.

In America, we often talk about racism in a hate vs. love frame, but if we are truly to address racial inequity, we must understand it in terms of power. This is necessary because racism is, at its core, a tool to establish and maintain power structures that are centered around whiteness. When we don't

talk about power and power dynamics at all levels (interpersonal, institutional, and systemic), we perpetuate inequity.

The Racial Equity and Inclusion Learning Question Team recommends that Living Cities:

- Take truthful stock of power dynamics within our own institution: Start paying attention to who speaks at meetings, in conversations, etc. What are the racial and in some cases gender dynamics? How is the idea of "appropriateness" used; and when and by whom? How do people disengage from conversations about race? Who is disengaging? How does that disengagement relate to power?
- Consider power dynamics in our work: Do community members and people of color have decision-making control in efforts we support? What are the narratives we use to explain why or why not? How are these narratives related to power?
- Use a power analysis in our communications about racial equity and in our programmatic work.

Tools and Resources:

Nadia's reflection on [Philanthropy and Power](#) in Living Cities' 2016 Annual Report
[Navigating Neoliberalism in the academy, nonprofits and beyond](#)
[Talking about race without talking about power is useless](#)
[Are you recreating the power systems you're fighting to undo?](#)

Reconciliation and healing are vital in advancing racial equity.

For other countries with racist histories, like South Africa and Canada, the movement towards equity has involved national Truth and Reconciliation Commissions, public hearings that openly acknowledge what happened and begin the process of resolution. The United States has had only two so far. One took place in Greensboro, North Carolina, from 2004 to 2006, and addressed a hate-driven massacre that left five people dead. Another has been meeting in Maine since 2012 to address the disproportionate number of Native Wabanaki children in foster care, forcibly removed from their homes and stripped of their cultural heritage. But nothing of the kind has taken place at the national level, and judging by the tone and timbre of our current national conversation, it is unlikely to happen soon. But, we can lay the foundation for that national conversation by integrating reconciliation and healing into the work and approaches of organizations and individuals working for social change. This has been proven necessary and effective in the work of institutions such as Kellogg, and in restorative justice efforts that intentionally bringing together people with seemingly diametrically opposed viewpoints—particularly people who have harmed with people who have been harmed—in a carefully prepared face-to-face encounter where everyone listens and speaks with respect and from the heart no matter their differences. The talking piece is a powerful equalizer, allowing everyone's voice to be heard and honored, whether that of a police officer, a judge, or a 14-year-old youth. In our own work at Living Cities, several staffers in conversation and in interviews with the Racial Equity and Inclusion Learning Question Team, and at staff meetings, have emphasized the need to pause for reflection, healing, and reconciliation to address past wounds as we move forward on our REI journey.

The Racial Equity and Inclusion Learning Question Team recommends that Living Cities:

- Includes an intentional focus on healing and reconciliation as we recommit ourselves to operationalizing REI. This could take any number of forms, including facilitated conversations,

role-play, written reflections and responses, The important thing about this focus, in whatever form it takes, is that it helps us to heal societal racial divides as they manifest at Living cities and recognizes the need to acknowledge the wrongs of the past, while addressing the consequences of those wrongs.

- Acknowledge that arguing and conflict is necessary. According to Citizen University CEO Eric Liu in a recent article in *The Atlantic*, "more arguing" as a step forward in healing our racial divide (though not the "stupid" type of arguing we've been doing in this election cycle, he says, which overlooks the root of our problems).
- Engage in conversation with leaders at Kellogg about their Truth, Racial Healing, and Transformation work and consider implications for our own practice.

Tools and Resources:

[Healing Justice Article from Unity Summit 2017](#)

[Within Our Lifetime Network Racial Equity / Racial Healing Network Survey](#)

[Four Lessons from Our Meeting with City Leaders in Albuquerque](#)

[W.K Kellogg Truth, Racial Healing and Transformation work](#)

Addressing systemic racism requires talking about white supremacy and white institutional culture.

White supremacy is not just about Nazis marching with tiki torches. It is a force that is engrained in our culture and operating modes. Culture is powerful precisely because it is so present and at the same time so very difficult to name or identify. Paying attention to how white supremacy manifests in our lives helps us to push against it.

The characteristics of white supremacist culture listed in this [document](#) are damaging because they are used as norms and standards without being pro-actively named or chosen by the group. They are damaging because they promote white supremacy thinking. They are damaging to both people of color and to white people. Organizations that are people of color led or a majority people of color can also demonstrate damaging characteristics of white supremacy culture.

The Racial Equity and Inclusion Learning Question Team recommends that Living Cities:

- Engage in an honest, facilitated, conversation about how white supremacy culture currently manifests at Living Cities and potential antidotes.
- Develop/refine/continuously revisit and lift up our working norms with a racial equity and inclusion lens.
- Ensure that senior leadership receive coaching such that they can consider how to counter white supremacy culture in their work.

Tools and Resources:

[White Culture Definition: Reflection Questions for Organizations](#)

[Compass point resources](#)

[Paying Attention to White Culture and Privilege: A Missing Link to Advancing Racial Equity](#)

We have to view arts & culture as fundamental; not peripheral.

"The arts drive movements for justice by creating a vision for the future." --Asante Salaam, New Orleans Office of Cultural Economy

Artists are central not peripheral to social change. From our 25th anniversary event that opened with powerful and memorable poetry readings to the conversation about Colin Kaepernick 'taking a knee,' to the role that artist-activists like James Baldwin, Nina Simone, and Frida Kahlo played in advancing dialogue and movements about issues such as feminism and anti-Black racism, the power of arts and culture as a lever is well-established. Yet, social change practitioners often shy away from engaging with artists and art in meaningful ways, preferring to stay in the "head space" rather than the "heart space."

The Racial Equity and Inclusion Learning Question Team recommends that Living Cities:

- Integrate art and culture as a core element of our brand through the experiences we create for our grantees, members, and broader community, both in person and in the digital space.
- Consider how to harness the power of shared experiences of art and culture to foster learning and understanding as we develop our staff and community racial equity and inclusion learning curriculum.

Tools and Resources:

- [Pop Culture Collaborative](#); represents an innovative hub for high impact partnerships and grants designed to help organizations and individuals leverage the reach and power of pop culture for social justice goals.
- Ashé Cultural Center: Ashé was a collaborating partner with Ashleigh Gardere of the City of New Orleans Network for Economic Opportunity to produce art bursts for the Living Cities convening with New Orleans cultural artists.

To close racial wealth gaps in America, a Southern strategy is necessary.

At the 2017 Unity Summit in New Orleans, much of the conversation focused on how if we don't understand the South, we can't get to economic opportunities and dismantle white supremacy in America. The South must be a key geography for advancing racial equity and inclusion because of its already extremely large Black community and its expanding immigrant community and because of the historic and present significance of the South, from slavery to Selma. One speaker noted that if you are working for racial equity and inclusion and you are not working in the South, you might have a problem. This sentiment has been echoed through our partnership with GARE on Racial equity Here, and in our TII work with New Orleans.

The Racial Equity and Inclusion Learning Question Team Recommends that Living Cities:

- Engage in a reflection and strategy conversation/meaning-making process about our work in the South to date, and potential opportunities.
- Engage in conversation with folks leading efforts related to ours in the South such that we better understand the realities on the ground.

Tools and Resources:

Frameworks for Action

We also reviewed framework for action from different organizations to inform the development of Living Cities' framework.

D5's framework:

Foundations get started in varying ways to incorporate diversity, equity, and inclusion (DEI) as organizational considerations. The most frequent factors that animate change are concerned people, mission relevance, donations and markets, critical moments, and DEI movements; i.e., the "5 Ms" of Mobilizers, Missions, Money, Moments and Movements.

Once foundation action gets under way around DEI, certain factors have been shown to be important. These are **leadership; a shared language and clear point of view; a broadly embraced message; openness to self-reflection, learning, and data; a manageable place to anchor the commitment in everyday work; early positive reinforcement and external supports.**

DEI work requires certain ingredients to make it sustainable. These include **good results through perseverance, an ongoing and broadening leadership commitment, growing organizational competencies, institutionalized "hard-wiring" of the DEI commitment, and systematic data for tracking impact.**

Young Nonprofit Professionals Network (YNPN)'s framework:

Equity, diversity, and inclusion (EDI) are essential values in YNPN's work with their members and chapters. This framework for taking action will help move YNPN chapters from values to practice around Equity, Diversity, and Inclusion (EDI.) Recognizing that different chapters will be at different levels in advancing EDI, this framework lays out specific actions chapters can take, and can help chapters see where they are at, and where they want to go next.

1. [Before You Get Started - Working with an Equity, Diversity and Inclusion Lens](#)
2. [Making the case for EDI to your Board](#)
3. [Growing diverse and inclusive leadership](#)
4. [Ensuring programming and events are diverse and inclusive](#)
5. [Growing a diverse and inclusive membership](#)

Government Alliance for Racial Equity (GARE) framework:

Developing a network of government focusing on racial equity is critically important to getting to different outcomes in our communities. Deeply racialized systems are costly and depress outcomes and life chances for us collectively. To advance equity, government must focus not only on individual programs, but also on policy and institutional strategies that are driving the production of inequities. The following six strategies are critical:

1. **Use a racial equity framework:** Jurisdictions use a racial equity framework that clearly articulates racial equity, implicit and explicit bias, and individual, institutional and structural racism.
2. **Build organizational capacity:** Jurisdictions need to be committed to the breadth and depth of institutional transformation so that impacts are sustainable. While the leadership of

lecteds and top officials is critical, changes take place on the ground, and infrastructure that creates racial equity experts and teams throughout local and regional government is necessary.

3. **Implement racial equity tools:** Racial inequities are not random; they have been created and sustained over time. Inequities will not disappear on their own. Tools must be used to change the policies, programs and practices that are perpetuating inequities. New policies and programs must also be developed with a racial equity tool.
4. **Be data-driven:** Measurement must take place at two levels – first, to measure the success of specific programmatic and policy changes, and second, to develop baselines, set goals and measure progress towards goals. Use of data in this manner is necessary for accountability.
5. **Partner with other institutions and communities:** The work of local and regional government on racial equity is necessary, but it is not sufficient. To achieve racial equity in the community, local and regional government needs to work in partnership with communities and other institutions to achieve meaningful results.
6. **Operate with urgency and accountability:** While there is often a belief that change is hard and takes time, we have seen repeatedly, that when change is a priority and urgency is felt, change is embraced and can take place quickly. Building in institutional accountability mechanisms via a clear plan of action will allow accountability. Collectively, we must create greater urgency and public will to achieve racial equity.

Bay Area Justice funders Network Social Justice Philanthropy Framework

Building on existing resources and thought leadership, through a participatory process informed by experienced philanthropists and leaders of social movements, the Bay Area Justice Funders Network has curated, ["The Choir Book: A Framework for Social Justice Philanthropy."](#) This volume of social justice philanthropic praxis includes: core values, individual competencies and actions that align values to practice in each stage of grantmaking. In combination, these values, competencies, and practices creates a comprehensive framework for effective social justice philanthropy.

Takeaways from analysis of different frameworks:

- Need a sustainability and long-term plan in place
- Data is important!
- There are specific competencies to be able to do racial equity work
- Community engagement should be a key part of your racial equity action framework

IMPLICATIONS FOR OPERATIONALIZING REI AT LIVING CITIES

In thinking about what Living Cities can do internally:

- This is about culture as much as equity. This is about how we build the culture we believe in. What is currently in place? What are the barriers?
- There are elements of crisis management in how this work came to be reinvigorated, but this is not necessarily a bad thing. Meaningful change often comes at a moment of crisis – as long as it's not superficial crisis management meant to quash complaint but rather rooted in real commitment to change.
- We need to embed a "listen first" philosophy/approach; not try to solve/answer right away – LEAD approach: Learning, Examination, Application, Discipline (sustaining over the long term)...repeat.

- We must simultaneously be urgent and gracious with ourselves individually and organizationally as we grapple with our organizational identity – there are always tensions in our beliefs/identities/actions, the question/work is about checking off as many of the tensions as we can in service of the results we're seeking.
- No organization, us included, can fully avoid replicating systems of inequity that exist in the world. We need to slow down so that we can be more mindful of implicit bias, harmful white institutional culture norms, and ways in which we fall short of our expressed values.
- We must prioritize and make time for educating ourselves on the history of racism, racist policies, and white supremacy in America and the violence and oppression they continue to inflict on communities of color.
- We must also work to develop a shared language around these issues so that all staff feel supported and included as we continue this journey.

It is clear to us that there are at least three very interconnected and interacting elements of this work:

Defining and Building the Culture We Believe in: Define and create a culture in which everyone can thrive, be respected and valued, and feel supported to take risks.

Competency Building and Learning: Ensure that all staff have a shared understanding of interpersonal (including implicit bias), institutional, and structural racism and all are equipped to make decisions that contribute to undoing it every day.

Operationalizing Equity and Inclusion: Examination of power structures/dynamics and systems/policies (HR, operations, compensation, team assignments, recognition and rewards) that contribute to inequitable results; Address/change them through consistently and systematically using REI used as a lens for internal and external decision-making.

IMPLICATIONS FOR ACTION IN THE FIELD

It is clear that we are both well-positioned to and feel urgency around approaching our racial equity and inclusion work in a [networked way](#). To this end, the Racial Equity and Inclusion Learning Question Team recommends the following actions (some already in consideration by organizational leadership):

- Pivoting the Racial Equity Here member taskforce from one that is focused on governance of Racial Equity Here to one that supports the sustainability of Living Cities' racial equity and inclusion work, supports the spread of operationalization of racial equity and inclusion in the public, private, and philanthropic sectors, and supports cross-member institution learning on this work
- Partner with GARE and other leaders in the space to develop shared outcomes, results, and performance measures for operationalizing racial equity and inclusion
- Harness Racial Equity Here (in its current configuration and any potential 2.0 models) to capture, codify, and share what it takes to do this work in government, and potentially in other sectors, and through cross-sector efforts in places.
- Tap into private sector/ social finance actors who are exploring racial equity and use Living Cities' leverage as a convener and network partner

As part of our field scan, we have begun to interview staff from our member institutions. As this report was finalized, we had completed one interview. We are including some key insights here and will share future results with staff as that work evolves under the leadership of the REH and Operationalizing REI teams:

Methodology

The recommendations and takeaways set forth in this report are the result of a varied research base: our team conducted an internal scan based on interviews of staff using the REI audit conducted by Frontline Solutions as a baseline; administered an anonymous survey of Living Cities staff; did a field scan to glean best practices from our partners in this work; and attended relevant conferences and other events to learn from experts in the field.

We synthesized our learnings through meaning-making sessions facilitated by the project manager and have been practicing putting tools and frameworks into action internally as a team.

METHODOLOGY: INTERNAL SCAN

In order to understand where Living Cities currently stands on advancing racial equity, we conducted an initial set of interviews with selected internal staff. Staff was selected across different bodies of work as well as job titles. Please see below the questions used in this interview::

- 1. What does applying an REI lens mean to you in the context of Living Cities?**
 - a. Have an understanding what applying REI lens means
 - b. Have an understanding on the link between REI lens and racial equity
 - c. Have an understanding of how Living Cities as an organization approach REI
- 2. What does applying an REI lens mean to you in the context of your project teams?**
 - a. Project teams are actively using REI lens in day to day work
 - b. Have an understanding that an REI lens is necessary for project team's outcomes
- 3. Are you aware of the REI audit done by Frontline Solutions? To what extent do you feel that you have applied the recommendations of the REI audit?**
 - a. Aware of Frontline Solutions Audit
 - b. Aware of recommendations relating to cluster
 - c. Can pinpoint where recommendations have been implemented
- 4. Do you feel equipped to apply an REI lens in your work?**
 - a. Identify barriers
 - b. Identify possible trainings

This set of interviews was a key input for the creation of the staff survey administered to establish a baseline of staff competency in applying a racial equity lens to the work of our organization. Having a record of this baseline data will provide an accountability mechanism for our organization as we work to further our staff competency around advancing racial equity.

For the questions and results of the staff survey, [click here](#).

METHODOLOGY: FIELD SCAN

We conducted a field scan to capture what the philanthropic, public, and private sector fields are doing around REI that helps us answer our learning question of **“What does it take to apply/embed a racial equity lens to the work institutions are doing to get dramatically better results for low-income people?”** In addition, we aimed to identify new entities we can partner with to advance REI in the field; understand the power of networks for advancing REI in the field; build on D5 Coalition’s Analysis of Policies, Practices, and Programs in Philanthropy; and synthesize our findings across sectors.

We defined “the field” as:

1. Philanthropy
2. Nonprofits and community organizations
3. Public Sector
4. Private Sector

For each sector of the field, we captured:

- Programs, initiatives, practices around advancing racial equity in their own organizations.
- Programs, initiatives, practices to advance racial equity in the specific sector.
- Organizations whose mission is to advance racial equity.
- Networks engaged by each organization.

Philanthropy

In philanthropy and the social sector, we looked at the following surveys:

- [D5 Coalition Survey](#)
- [Building Movement Project's Race to Lead](#)
- [Within Our Lifetime Network Racial Justice Funding survey](#)
- [Within Our Lifetime Network Racial Equity/ Racial Healing Survey](#)

There are several field scans already done in philanthropy; we looked at the following:

[The Road to Achieving Equity: Findings and Lessons from a Field Scan of Foundations That Are Embracing Equity as a Primary Focus](#)

The findings in this document were gathered at the request of the Robert Wood Johnson Foundation, as part of its quest to better understand what other foundations are doing to incorporate equity — both in their internal operations and in their grantmaking.

[D5 Analysis of Programs, Policies and Practices to advance Diversity, Equity, and Inclusion in Philanthropy](#)

To support leaders in their efforts to take meaningful action to address diversity, equity, and inclusion (DEI) in their organizations, D5 commissioned JustPartners, Inc. to identify the most effective policies, practices, and programs to advance DEI. It provides a comprehensive scan of existing written and web-based resources from philanthropy and the more general fields of organizational effectiveness

and social justice in order to identify existing policies, practices, and tools that can inform and guide philanthropic action. Drawing upon the literature, interviews with foundations, and the authors' decades of DEI consulting in philanthropy, the report provides a chart of policies and practices that are key to advancing and sustaining DEI. These are anchored in five strategic questions and their indicators:

- Has the organization made an **expressed commitment** to DEI? (with 3 indicators)
- Has it authorized DEI in **organizational policy**? (with 6 indicators)
- Has it implemented DEI practices in its **operations**? (with 11 indicators)
- Has it implemented DEI practices in **grant-making**/other **programmatic areas**? (with 11 indicators)
- Does it utilize **accountability mechanisms** to monitor DEI? (with 11 indicators)

Current and emerging bodies of work in philanthropy/ social sector on racial equity:

[Alliance for Boys and Men of Color](#)

The Alliance for Boys and Men of Color is a coalition of change agents committed to improving the life chances of California's boys and young men of color. The Alliance includes youth, community organizations, foundations, and leaders in government, education, public health, and law enforcement.

[CHANGE Philanthropy](#)

CHANGE Philanthropy (formerly known as Joint Affinity Groups) was founded in 1993 to unify identity-focused philanthropic affinity groups into an empowered coalition. Coming together, CHANGE [seven core partners](#) are working to integrate diversity, inclusion, and social justice into philanthropic practice, transforming the sector's culture to be one that embraces equity.

[Within our Lifetime Network](#)

Within our Lifetime Network is a network of racial healing practitioners and racial equity advocates who are committed to ending racism in our lifetime.

[Movement for Black Lives](#)

The M4BL Policy Table focuses on supporting the development and implementation of visionary and uncompromising local, national, and international policy objectives aimed at ending state-sanctioned violence against Black communities.

[Borealis Philanthropy Black-Led Movement Fund](#)

The BLMF provides general operating support grants, organizational development support, and movement building resources organizations involved in the Movement for Black Lives.

[Black-Led Social Change Funders Network](#)

The Black Social Change Funders Network (BSCFN) is a network of funders committed to creating thriving Black communities by strengthening the infrastructure for Black-led social change.

[Philanthropic Initiative for Racial Equity](#)

The goal of the Philanthropic Initiative for Racial Equity (PRE) is to increase the amount and effectiveness of resources aimed at combating institutional and structural racism in communities through capacity building, education, and convening of grantmakers and grantseekers.

[D5 Coalition](#)

D5 is a five-year coalition to advance philanthropy's diversity, equity, and inclusion. As our constituencies become increasingly diverse, we need to understand and reflect their rich variety of perspectives in order to achieve greater impact. To meet this challenge, philanthropic, community and thought leaders are all coming together in an ambitious effort. We started in 2010—by forming an unprecedented coalition of 18 infrastructure organizations and setting a strategic agenda to help philanthropy become more diverse, equitable, and inclusive.

We have also compiled a list of racial justice organizations [here](#). Wherever possible, we have included funders for the organization. Thanks to our summer intern, Joanna for this work!

Members of our team attended the following conferences and events:

[Othering & Belonging Conference](#) by the Haas Institute for a Fair and Inclusive Society, April 30 - May 2nd, 2017, Oakland, CA

[The Asian Americans / Pacific Islanders in Philanthropy](#) Annual Network Convening, May 19-20, 2017, Los Angeles, CA

[Racism in Philanthropy: Effective Practices for Grantmakers Webinar](#) by Schott Foundation [WEBINAR]

[UNITY Summit](#) by CHANGE Philanthropy, September 17-20, 2017, New Orleans, LA

[An Afternoon Talk with Kimberlé Crenshaw on Intersectionality](#), September 24th, New Orleans, LA

Race and US Cities Taskforce Member interviews

We are currently in the process of talking to the Race and US Cities taskforce members (this taskforce is made up of staff from member institutions who helped to design REH and currently serve as its governing body) as part of the field scan. Below are questions, adapted from the different surveys and scans we reviewed, that we are planning to explore:

1. Internal Operationalizing

- a. How interested is your organization in addressing racial equity internally? Externally?
- b. How comprehensively has your organization integrated racial equity in the following areas: ***Recruitment, Grantmaking, Diversity and equity considerations in asset management and investment strategies, Building organizational cultures that support diversity and inclusion, Collection and use of demographic data to measure progress and inform strategies***
- c. How central is racial equity to your mission?
- d. What are challenges you are seeing in your organization in advancing this work?

2. Programmatic Questions

- a. Are you funding racial equity work? What are you funding?
- b. What are the criteria for "racial equity work"?
- c. Do you differentiate racial equity vs. racial justice work? If so, how?
- d. Do you have any ideas for how funders interested in addressing structural racism could act collectively in a long term/strategic way? What would such an approach require?
- e. How would you propose funders hold themselves accountable for the results of a collective approach?

3. Perception of Living Cities

- a. How do you see Living Cities' commitment to REI?
- b. Are you aware of Living Cities' strategies to advance REI?

4. For Racial Justice / REI Funders

- a. Do you have outcomes, measures, and strategies for accomplishing your work? If so, do you include racial justice organizations in the creation of them?
- b. Do you seek to deeply understand the implications and challenges of being a "self-sufficient" racial justice organization?
- c. Do you provide flexible, less restricted funding to organizations of color (not solely white organizations) to build and sustain infrastructure, staff and programs?
- d. Do you support research to expand evidence, direct action, community organizing and establishing communities of practice?
- e. Do you support rapid response initiatives?

Public Sector

Much of our research on programs, policies and practices in the public sector built on the work of our Racial Equity Here cities, The Integration Initiative Cities, and Government Alliance for Racial Equity.

Current and emerging bodies of work in public sector:

[Government Alliance for Racial Equity](#)

The Government Alliance on Race and Equity (GARE) is a national network of government working to achieve racial equity and advance opportunities for all. GARE has worked with 80 local and regional government jurisdictions across the country. This [map](#) shows all of the jurisdictions where GARE is currently working in some capacity.

[Equipt to Innovate - Race Informed](#)

[National League of Cities Race, Equity and Leadership](#)

NLC's Race, Equity, And Leadership (REAL) initiative serves to strengthen local leaders' knowledge and capacity to eliminate racial disparities, heal racial divisions, and build more equitable communities. Through training and online resources, REAL helps NLC members build safe places where people from all racial, ethnic and cultural backgrounds thrive socially, economically, academically and physically.

[Local Progress](#)

A network of hundreds of local elected officials from around the country committed to a strong economy, equal justice, livable cities, and effective government. Local Progress is the only network for progressive municipal elected officials from around the country.

Members of our team attended the following conferences/events:

- Government Alliance on Racial Equity Member Convening, May 2-3, 2017, Oakland, CA
- SXSW Panels
 - "Making a Place for Equity in Michigan" which featured Mayor Bliss from Grand Rapids, Darell Rose (James Chapman (Rock Ventures), April Boyle (Build Institute) and Pamela Lewis (New Economy Initiative).

- "Five Cities are Eliminating Racial Inequity, You Can Too", moderated by Nadia Owusu and featuring Glenn Harris from The Center for Social Inclusion and Mayor Richard Berry from Albuquerque.

Private Sector

Literature review:

[Minority and Women Entrepreneurs: Building Capital, Networks, and Skills](#)

[Kauffman Compilation: Research on Race and Entrepreneurship](#)

In this volume, the Kauffman Foundation has assembled an assortment of its work on entrepreneurs of color, the particular challenges facing these demographics, and the practical and policy ideas to address them.

Women and Minority-Owned Private Equity Firms

A market review of women- and minority-owned private equity firms actively raising capital in 2015 based on data collected by Fairview Capital.

[Recognizing the Results - The Financial Returns of NAIC Firms: Minority and Diverse Private Equity](#)

The findings of this report conclusively affirm the tangible benefits investors may realize by investing capital in minority and diverse private equity firms that remain largely overlooked by institutional investors.

[The Equity Solution: Racial Inclusion Is Key to Growing a Strong New Economy](#)

This research brief adds new data to the discussion about equity and America's economic future by estimating the economic benefits of racial inclusion for the largest 150 metropolitan regions, all 50 states, the District of Columbia, and the nation as a whole.

[The Roots of the Widening Racial Wealth Gap: Explaining the Black-White Economic Divide](#)

This study followed 1,700 working-age households over what is now a 25-year period – from 1984 to 2009. This approach offers a unique opportunity to understand what happens to the wealth gap over the course of a generation and the effect of policy and institutional decision-making on how average families accumulate wealth. The findings provide evidence that the wealth gap almost tripled from 1984 to 2009, increasing from \$85,000 to \$236,500. The median net worth of white households in the study has grown to \$265,000 over the 25-year period compared with just \$28,500 for black households.

[NVCA-Deloitte Human Capital Survey Report](#)

Using data from over 200 US firms representing over 3,000 employees, the NVCA-Deloitte Human Capital Survey was designed to capture critical data on the workforce at venture capital (VC) firms, and develop a baseline understanding of demographics within the VC industry. The survey is intended to be an educational resource for venture capital firms to understand how to expand the diversity of their teams and portfolio.

[The Tapestry of Black Business Ownership in America: Untapped Opportunities for Success](#)

Funded by the W.K. Kellogg Foundation, the report set out to assess the economic strength and potential of Black-owned businesses, identify challenges and opportunities across a mosaic of segments, and launch a national discussion on how investors and policymakers can increase the

effectiveness of programs designed to support Black entrepreneurship, keeping in mind that rich diversity.

[The Competitive Advantage of Racial Equity](#)

Developed in partnership with [PolicyLink](#) and funded by the Ford and W.K. Kellogg foundations, The Competitive Advantage of Racial Equity highlights examples from 12 leading companies such as Gap Inc., PayPal, and Cigna, who are driving innovation and growth by advancing racial equity.

Members of our team attended the following conferences/events

- [Who Benefits? NYU Symposium on Diversity and Inclusion in Social Finance](#), April 21, 2017, New York, NY
- Echoing Green All Fellows Conference, November 16, 2016, Atlanta, GA
- Employing Innovation & Impact Investing to Build Black Business a Roundtable with Investors, September 17, 2017, New Orleans, LA

Current and Emerging Bodies of Work in Social Finance / Private Sector

[Living Cities' PFS Initial Screening Criteria](#)

Our initial screening criteria designed to assess whether a project is a good use of the PFS model, and if it is a good fit with Living Cities' programmatic priorities. One of the criteria assessed is on racial disparities.

[TransformFinance](#)

Transform Finance seeks to contribute to a broader [racial justice agenda](#) by exploring how investment decisions play a role in driving race-related outcomes and by informing, organizing, and empowering investors with concrete tools across asset classes.

[PolicyLink / FSG Corporate Racial Equity Advantage](#)

The Corporate Racial Equity Advantage will be developed with input from both the corporate and equity communities. Our goals are to identify companies that benefit from creatively furthering equity, share promising examples and lessons learned, and establish pathways that enable more companies to achieve both equity and prosperity. In the coming months, we will recruit corporations, NGOs, and community groups to join us in designing, refining, and testing this tool.

METHODOLOGY: REI LEARNING QUESTION SKILL-BUILDING & EVIDENCE BUILDING PRACTICE

We used our weekly meetings as a safe space for the team to test a range of tools for facilitation and engaging in racial equity-related conversation.

Our project manager used a consistent standard learning question agenda that allowed us to blend personal reflection and outside research to learn at a personal level, from one another, and from the field. We dedicated meetings to skill-building practice and tested frameworks such as the [ACT \(Affirm, Counter, Transform\)](#) method to engage in debate with our fellow team members, [strategic questioning](#), learning and honing personal and interpersonal skills while we worked on learning on the behalf of the organization.

Our project manager also created a learning agenda and knowledge plan before every conference or other event we attended, to focus on particular sub-questions that we were most interested in exploring.

We regularly reflected on learning memos submitted by Racial Equity Here team and conducted quarterly meaning-making synthesis sessions to distill learnings that arose from our internal and external research. The themes presented in this report are the result of those meaning-making sessions. [Click here](#) for the themes that we synthesized based on our meaning-making session on March 28, 2017.

Toolkits/ Resources

We have compiled tools and resources featured in this report and more [here](#).

Our summer intern, Joanna Carrasco, compiled a set of #Goodreads resources on racial equity [here](#).