Looking in the equity & inclusion mirror

Lessons from an OSF program

Megan Colnar and Sarah Hewitt | December 2021

About and acknowledgements

The Economic Justice Program (EJP) of the Open Society Foundations ran from 2018 until the end of December 2021. During this time, and building on the work of its two parent programs (Fiscal Governance and Economic Advancement), EJP developed the Foundations' first-ever strategy dedicated to fighting economic injustice and pioneered approaches to good grantmaking and investing for social change.

This learning brief provides an overview of EJP's internal review of its own practices and culture in relation to intersectional equity and the lessons learned along the way. The aim is to share insights and resources for funders and grantee partners who are considering undertaking a similar equity-focused review and to encourage action on intersectional equity within the field.

If you'd like to learn more about these insights, contact Sarah Hewitt. For more reflections from the Economic Justice Program, take a look at our other learning briefs: building a culture of evidence and learning; more than a strategy; and funding for a healthier civil society.

This is not an official Open Society Foundations publication; the views within are the authors' own and do not represent the views of the organization.

Looking inwards

When the Open Society Foundations' Economic Justice Program formed in 2019, equity and inclusion were front and center in its vision, mission, and values. With an ambition to enable efforts that advanced economic well-being and access to basic good *for all*, promoted *collective* responsibility and participation, and *diminished imbalances* in wealth and power, we knew that we would need to understand and support greater equity and inclusion within our grantee and investee organizations.[1] But we also quickly recognized our own challenges, within the program, when it came to being more diverse and inclusive. We didn't have a clear sense of what our own internal culture and practice looked like, let alone whether it reflected the diversity and inclusivity that we imagined expecting from others. It was clear: we couldn't engage with gaps in the culture and practice of our partners until we had looked at our own.

The Economic Justice Program was a merger between two of the Foundations' largest global programs, the Fiscal Governance Program (FGP) and the Economic Advancement Program (EAP), each of which had been grappling with issues relating to inclusion, diversity, and power. FGP was involved in broader conversations about the issue of "elites" leading the transparency, participation, and accountability sector, and within the team itself there was a strong collective desire to confront implicit bias in its grantmaking and operations. EAP meanwhile had identified several gaps in its portfolio and its practices, with gender imbalance emerging as a particularly urgent issue. When the two teams came together to form a new program, we decided to set aside $150,000 budget[2] to undertake an internal intersectional equity review.

Establishing the review's scope

With a large and newly integrated team of around 45 staff, our first task was to develop a shared understanding of the challenges and decide what the scope of an equity and inclusion review would be. We had robust internal debates about whether to maintain a narrower focus on gender, or to assume a broader intersectional lens on identity and inclusion (Box 1).[3] We wanted to enlist an independent team to conduct the first-phase review and sought expert input to come up with terms of reference (TOR) that made sense. Applicants to the consultancy itself encouraged us not to prioritize one facet of identity and inclusion over another, advice that was reiterated by colleagues in the Foundations' Women's

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1 Of course, even if the program hadn't been focused on these themes, issues of diversity, equity, and inclusion within the team's culture and practice would still be vitally important—as they should be for all organizations, institutions, and structures in a just society.

2 A combined annual grantmaking budget of more than $35 million and an annual investment target of $80 million.

3 FGP had developed terms of reference (TOR) for an intersectional equity audit of grantmaking practices and partners that, following a first unsuccessful recruitment round and consultant feedback, we were in the process of streamlining. EAP had also invested significant time and effort in conceiving its own more gender-focused review before the program merger.

Rights Program (WRP) and aligned with the 6–8 months of exploration former FGP colleagues had already done. The final TOR was for an intersectional equity analysis of EJP operations and practices.

Box 1: Driven by staff, prioritized by leadership

EJP's intersectional equity review was initiated in no small measure by junior staff. At the same time, the program's senior leadership were unequivocal about it being a shared responsibility and a program-wide commitment:

> Program directors made it clear this was a huge priority… everybody was responsible for helping to implement… the changes… and we made it a part of people's annual evaluations."

EJP staff member

This combination of bottom-up motivation and top-down accountability was a precondition for kickstarting the review and for developing a meaningful response to its findings. It did, however, necessitate a continual balancing of participatory, staff-led initiatives and leadership-driven approaches; between the urgency for action and the need for a team-owned response.

> We knew about intersectionality as different and multiple, overlapping identities, but I don't think we fully appreciated the important gaps (missing intersections) that are lost when taking a single lens approach.

EJP staff member

Box 2: What is intersectionality?

An intersectional analysis of structural discrimination "argues that no human being holds a single or even a dominant identity but rather that **all people have multiple intersecting identities**, some of which are related to immutable and largely unchangeable physical characteristics…[or]…group identities. Intersectionality is a way of understanding these many overlapping constructions and it argues that women, men, and gender non-binary or non-conforming people may participate in a range of collective movements based on both identity and ideology."[4]

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4   Action Steps for Program Staff to Develop an Intersectional Gender Justice Muscle 3-3-20.

Appointing an independent team

We welcomed applicants that challenged and educated us, and even asked finalists what they would do with more money. Excited by their vision, we made more resources available for the Review. Interestingly, although we thought our TOR was clearly focused on *internal operations*, we found that the default plan proposed by many of the 20 or so applicants was to look at the *results of our work* from an equity and inclusion perspective—that is, program impact rather than program operations and practice. Ultimately, we appointed a team of consultants who were Black, Indigenous, or other Women of Color (BIWOC) from the Global South who, in late 2019 began an Intersectional Equity Review of power dynamics within the EJP team, our practices and policies.[5] They reviewed program documentation and resources, interviewed the majority of EJP staff members, and conducted a voluntary survey of staff including how they identified across several identity categories.

It is important to note that the staff survey needed to include self-identification questions because OSF (which has offices around the world) did not yet collect or disclose this information due to legal implications, which differ between countries. Having this kind of data, however, is essential to understanding dominant and underrepresented identities within the team's operations and decision-making structures. Understanding the reasons why data was not proactively collected within OSF and the complications in arriving at this picture made us recognize many of our grantees and investees would face similar difficulties. This meant expecting a slower roll out of our plans for introducing this type of request in our grantmaking and investment practices.

The consultants submitted their final report and recommendations in August 2020, and our response to their findings and recommendations began in October 2020.

> " The great thing about it is that [EJP was] so open to discussing everything. There were no 'sacred cows.' They wanted a no-holds-barred review; they wanted us to be brutal.
>
> **Independent consultant**

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5   EJP Intersectional Review Report

Review findings

A major gap in the review was a lack of demographic data about EJP's partners, not yet collected as a standard practice, which meant the review dealt a lot in the foggy world of perceptions about what, who, and how EJP's decisions about its resources showed up in the world. The review focused on understanding and analyzing staff perceptions—often at odds with one another—and helping EJP leadership make sense of its weaknesses and opportunities for change regarding intersectional equity.

Here are just a few of the more intriguing top-level findings:

- **Understanding among the team:** Levels of understanding of gender and intersectional equity within the team were mixed and wide-ranging, with insufficient dedicated in-house capacity to support and integrate intersectional equity in practice.

- **Team composition:** Despite more than 15 countries of origin and 5 continents being represented within EJP, most team members were from the Global North; a critical mass of staff from outside the US and the UK was absent. The program's senior leadership team, in particular, lacked diversity, being comprised entirely of individuals born in the US or UK and almost entirely white, heterosexual, and cisgendered. It should be noted that EJP's offices were based in the US and UK, and while there was precedent for hiring foreign nationals for positions, there are rules and regulations set by US and UK governments that make this a challenging (and at times,[6] almost impossible) process.

  The consultants commented that this team make-up affects what becomes dominant practice and vice versa; that is, the majority of the team being from the US or the UK created a culture that prioritized this identity and looked for reflections of it in others—both in determining which leaders, organizations, and businesses received our funding and support (our grantmaking and investment practice) *and* in deciding who is considered a "good fit" for the team when hiring staff or consultants. See also 'Funding practices' and 'Networks.'

- **Gender pay and power gaps:** Pay gaps in the program reflect salaries in different sectors (i.e. grantmaking and investment) and different labor markets. There was, however, a perception among some staff that these gaps are also gendered (in part because of the gender balance of particular teams within EJP).

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6   For example, during the Trump administration in the US, which spanned the four years before this Intersectional Equity Review took place and came to an end shortly after the review was concluded.

- **Funding practices:** Multiple interviews revealed a perception among staff that, where EJP provided grants to Global South organizations, these grantees tended to be headed up by members of historically privileged racial, caste or ethnic groups in their respective countries, or by Global North expats living in the Global South. There was insufficient data to support or refute this perception, which in itself reaffirmed the need for EJP to prioritize equity and diversity analysis in its funding practices. Moreover, the investment team noted that, although documentation required information about the composition of a potential investee's leadership or board, it was not being meaningfully considered in deciding whether to invest.

- **Networks:** New grantees, potential partners, and consultants were largely identified via existing networks, which limits the scope for diversity and overlooks "unknown" people, organizations, and ideas. This potential lack of diversity in the program's networks when it came to grantmaking was noted by most EJP staff members (though there was not enough data to interrogate this further). In relation to hiring consultants, some opportunities have been listed in open calls; however, these have largely been in Global-North dominated forums or spaces that require fee-paying membership. Time pressure was noted as the most common reason for not diversifying the range of consultants contracted.

Within these findings, it was already clear that there were structural biases as well as individual biases. For example, the investment team noted that practices that respond to gender, race, and class inequalities and to advance diversity and inclusion are not generally considered in the culture of mainstream fund management. Similarly, visas and immigration rules set at national level had some effect on team composition and the word-of-mouth or direct solicitation approach to identifying grantees is the one taken by the majority of Open Society Foundations grantmaking (not only by EJP).

How we responded

Starting in October 2020, we set about trying to address the gaps that we and the consultants had identified. This was a highly managed process that sought to maximize participation, enable action among those closest to the issue, and keep staff resolve and commitment high. EJP's senior leadership team (SLT) were kept involved throughout the process but were not solely in charge of the program's response to the review findings.

Box 3: A year that showed us action was urgent

EJP's Intersectional Equity Review was mostly conducted in 2020, a year of extraordinary and unprecedented change. Facing COVID-19, global economic turmoil, and a massive racial justice awakening in the US after the murder of George Floyd in Minneapolis, our team was more "prepared" for and "embedded in" these issues than we might have been during a normal year. This context also put more pressure on EJP senior leadership to *do* something and made it harder to make excuses for inaction.

The SLT member appointed to oversee the Intersectional Equity Review created six working groups of EJP staff, which were each tasked with developing objectives and a 12-month action plan in line with the analysis and recommendations set out in the review. For the most part, these working groups corresponded to the consultants' own analytical categories, but we did make some modifications based on our knowledge of how practices were operationalized in the team. The groups were:

1. Contracts & Contracting
2. Culture & Staff Sensitization
3. Grants & Grantmaking
4. Investments & Investing
5. Operations, Management, & Governance
6. Strategy, Standards, & Benchmarks

Working membership and their topics of focus were generally decided by EJP's two Co-Directors and the Director of Strategy & Impact, with some scope for other team members to join or decide not to participate. Group composition was largely based on staff roles and responsibilities (e.g. grantmakers were in the Grants & Grantmaking group, operational staff in the Contracts & Contracting group) and we made efforts to adjust workloads so that the action plans would be adequately staffed. In some cases, members were assigned to groups on the basis of skillset or according to individual interest level.

Each group also included at least one team member from EJP's Strategy & Impact Unit, given that the work to develop action plans would involve significant monitoring and data collection and analysis. These colleagues were also able to advise on accountability mechanisms as the program put its action plans into practice. This was critical to upholding our commitments. The Director of Strategy & Impact drafted a TOR that set out working group roles and responsibilities and developed a workplan template for the groups to use. The working groups each nominated one representative to join the program's Co-Directors and the Director of Strategy & Impact in a Steering Committee that would oversee implementation. Working groups met regularly between November 2020 and mid-2021, but subsequently disbanded due to internal shifts at OSF that ultimately led to the dissolution of EJP.

Outcomes and early impact

Several working groups did accomplish some of their initial objectives, including designing and implementing a baseline training on applied intersectionality for all EJP staff, developing a working glossary of IE terminology and preferred identity language, and assessing where an IE lens could be applied in procurement processes.

We also created a demographic data collection form and accompanying guidance to pilot with grantees and investees, making us (to our knowledge) the first funder to attempt to tackle more complex questions of identity and representation globally. Other funders have started with a focus on a particular country or context, allowing for a form with more pre-populated choices and responses. Since EJP needed the form to be usable and relevant across countries and contexts, we had to take more open approach, that we expected to iterate over time.

There are early signs that this work is being integrated into OSF practices. For example, OSF's central communications department has incorporated terms from the working glossary into the OSF Editorial Style Guide. And, although EJP itself will no longer exist, former EJP team members will take forward the knowledge and principles they've learned, and we hope that others can do likewise with the help of this learning brief.

Lessons and recommendations

Start at home, within your own team

Before setting expectations of your partners, in whatever capacity, turn the lens inward to look at the culture and practice within your own team or organization.

A logical first step is to begin with the things that are within your control. You may not, for example, determine who leads or governs an organization, but you are in control of how you think about who does and how it affects your decisions. We can better shape our own actions and practices to improve how they promote equity and inclusion and limit the ways in which they serve inequity and exclusion.

Our approach of "starting at home" was not only pragmatic. We could not in all good conscience hold our partners to standards that we weren't prepared to meet ourselves. Moreover, given the mutually reinforcing relationship between internal culture and practice and external influence (page 6), our hope was that by making changes based on the findings of the review, we would also help to strengthen the extent to which outcomes from our partners' work promoted greater equity and inclusion too. For example, by noting that we needed to fund more organizations led by women of color, we thought a shift in resources to and more focus and attention on impacts and outcomes for women of color would also be more likely.

> " We were signaling to our partners that if this is important to us, we should be doing the work.
>
> **EJP staff member**

> " We might not have solved all the issues, but at least we started asking the questions and saw how difficult it is to do in practice.
>
> **EJP staff member**

> " The thing to know is that this is uncomfortable work, especially around unconscious bias. In the best of times, with the best of people, it's difficult. This speaks to… the level we are willing to go to, to challenge ourselves and others: it's easier work if we're just doing surface level stuff—it's exhausting if we're trying to contribute to change that is deeper and more meaningful.
>
> **EJP staff member**

Turning the lens inwards also:

- demonstrated to partners our genuine commitment to these issues and gave us a deep appreciation for how much time and discomfort is required to address inequity in a meaningful and honest way, and made us think about what challenges our partners might face if we began to ask some of these questions;

- forced us to look critically at the role our grantmaking, investment, and other work plays in supporting equity/inequity and inclusion/exclusion, and the extent to which we can truly control better practices everywhere. Given we also in the process of developing the program's inaugural strategy that sought to advance equity and inclusion in the wider world, this was a helpful sense-check;

- strengthened EJP as a team by deliberately creating spaces for reflection, helping team members to not only establish a common understanding of intersectional equity challenges and how they manifested in our culture and practice, but also to name, discuss, and begin to address complex layers of team dynamics. This was particularly useful given EJP had only recently been formed and because it also housed OSF's impact investment arm, meaning our differences in starting points and experiences were even more pronounced than they might have been within a typical global "grantmaking-only" team.

(Don't wait to) Bring in expertise

Talk to experts early on to help you set the parameters of your review.

Initiating an internal review involves knowing what you don't know. Even as you develop the scope of the review itself, it's therefore useful to get input from experts on the subject. We invested significant time (first, as individual programs and latterly, as EJP) into right-sizing the terms of reference for a review and with significant input from a range of people from within and outside the Foundations. This clarity early on helped us to identify the right consultants for the job (and certainly to discount those who weren't aligned with our thinking) and made sure that the EJP team itself was committed to "rowing in the same direction."

Create space to have tough conversations

Recognize that these are sensitive issues and open up spaces for conversation, reflection, and debate.

External support not only helped us to fill in gaps in knowledge and capacity but was also essential in navigating the sensitivities surrounding identity, inclusion, and power. In the words of one EJP staff member:

> "It's very easy for these topics to turn into someone feeling that they're being attacked. And it's personal: it's how we work with each other that comes up, so [it's good to] have someone who can play naïve and ask certain questions."

The fact that we intentionally created and set aside space for one-on-one engagement with the consultants was also important for staff who felt less comfortable sharing in a group setting.

We also endeavored to think about intersectional equity as an ongoing conversation that lived beyond this single review; less as a "pass" or "fail" scenario and more as a continual process, the meaning of which and approaches would need to change over time.

> "
> I think the report got us to face things that some of us already knew but that hadn't been considered by some people—especially in the leadership team. For example, the idea of the privilege that comes with being a native English speaker... it made us question things that I think were very valuable.
>
> **EJP staff member**

Develop your own plan

Don't rely on external consultants to create a ready-made roadmap at the end of the process.

Before the review gets underway, think through how you will take forward any recommendations that might emerge. It's worth noting that, if you enlist external consultants to undertake a review like this, it's unlikely that they will come back with ready-made action plans—and if they do, it's unlikely to be the exact fit for your team given their limited knowledge and experience of the organizational realities and dynamics. You should plan to plan: be prepared to dedicate time for staff to translate consultant recommendations into a more actionable roadmap and think early on about what would make this process easier (e.g. establishing a clear structure and format for receiving recommendations so they are easier to interpret).

> "
> [The consultants] were trying to be very comprehensive, and the report is great, but we ended up with a huge list of somewhat generic recommendations and not a lot of clarity on what priorities should have been.
>
> **EJP staff member**

Reflecting on our own experience, and with more forethought and a greater understanding of the consultant team's process, we might have encouraged them to bring on a communications expert to help make their work more accessible and actionable.

Many team members admitted to feeling overwhelmed by the detailed report findings; thinking through what we wanted from the final deliverable (and being more explicit with the consultants about these expectations) might have reduced this overwhelm and help us get to what the priorities were more quickly.

We would certainly suggest freeing up staff time so that action plans could be developed and put into practice, but this was something that we struggled with in reality. Longer-term support from consultants might have helped with this but managing expectations and being patient was also key.

Structure your response

Structure your response into manageable but meaningful "chunks" and share responsibility across the team.

These are meaty issues and unlikely to have simple, quick solutions. It is therefore essential to structure your response into meaningful "chunks" that connect concrete, short-term action to a longer-term vision. The process of forming working groups to develop action plans took time and negotiation but helped us to ground potentially abstract discussions in practical terms of who could be responsible for what. Once established, we were then able to set benchmarks for areas the review had found lacking and identify deliverables.

Our choice to decentralize the review response and to create working groups also helped to maintain a sense of ownership and shared responsibility. It revealed that some team members were better than others at breaking down complex issues into smaller pieces and actionable plans; it created space for people to step into leadership roles for the first time—some of whom were surprised to find it wasn't as simple as they'd imagined.

> The working groups made it feel like everyone had a place and made us reprioritize a lot of things.
>
> EJP staff member

Manage expectations

Communicate with staff throughout the review and response so that impatience for change doesn't become despondency.

While the team may be on board with diversity, equity, and inclusion and the notion of intersectional justice, people will have different views of what these things mean. It's important to make space for some disagreement but also to be clear about the scope and focus of the review—including the things that you can (and can't) change, and over what period of time.

In EJP's case, the review itself was lengthier and more time-consuming than expected, particularly since much of it took place during the COVID-19 pandemic. We also had to ask the consultants to go back and collect more survey responses after the first round left some concerning gaps. Given that we had gone into the review process with many team members already tired of waiting for action, a core contingent of staff was impatient to see results. Good communication throughout the process was critical to ensuring that any impatience didn't turn into despondency.

> " Neither we nor the consultants were very clear-eyed about how long this work might take, and how much back and forth would be needed, even after the initial data collection and analysis was complete.
>
> **EJP staff member**

As we moved to respond to the review findings, it became clear that our sphere of influence and control was sometimes limited. The review had recognized that some of our failures or gaps in relation to greater diversity, equity, and inclusion were a combination of our biases and structural features that are further outside of our control, and this became evident in some of the action plan working groups. For example, some of the issues identified were institutional in nature (e.g. the standard questions in OSF's procurement system), which we could hope to influence but not directly change.

When it came to staffing, leadership, and team composition, there were other complex dynamics at play. For instance, hiring people from outside the US or the UK (where our offices were based) was largely determined by government regulation. And even though our senior leadership was mostly white, we certainly couldn't move any of these people from their posts on this basis (for both technical and ethical reasons), nor did we have unlimited headcount to add new leadership positions to redress the balance. Coming to terms with what we could and couldn't change and managing the politics of the "can't/won't" was challenging but important.

> " At some point it starts getting into painful decisions about promotions, rotating off...[and] getting people to own it at top and bottom is key to making it through those painful parts.
>
> **EJP staff member**

Suggested resources

General understanding

What is intersectionality?

Two-minute video in which Kimberlé Crenshaw describes intersectional theory—the study of overlapping or intersecting social identities, and particularly minority identities.

Source: National Association of Independent Schools.

Watch the video

Action steps for program staff to develop an intersectional gender justice muscle

An intersectional gender justice primer for Open Society Foundations staff.

Produced by the Foundations' Women's Rights Program.

Contact the Open Society Foundations for further information

Grantmaking with an intersectional lens

Slide deck from a presentation on best practices for intersectional grantmaking.

Source: Funders for a Just Economy and Neighborhood Funders Group.

View the slides

Power moves: Your essential philanthropy assessment guide for equity and justice

Suite of self-assessment resources to help funders explore their own power.

Source: National Committee for Responsive Philanthropy and Philamplify.

Explore the resources

Trust-based philanthropy: An overview

Guide for grantmaking practice and starting point for funders who want to explore or deepen their commitment to trust-based philanthropy.

Source: Trust-based Philanthropy Project.

View the guide

Operationalizing equity: Putting the Annie E. Casey Foundation's racial and ethnic equity and inclusion framework into action

Reflection on Casey's experience, meant to serve as a resource and reference point for other organizations looking to "embrace equity as a core value reflected in all elements of the institution's programs and operations."

Source: Annie E. Casey Foundation.

Read the report

Research on intersectional equity and philanthropy

Annotated bibliography tools and resources on operationalizing IE for philanthropy, including funder networks and organizations to follow.

Produced by the EJP team.

Jump to Annex 5

Language and vocabulary

Race-class: A winning historical narrative

Research on political narratives around race and class: what works and what doesn't.

Source: Demos, Lake Research Partners, Ian Haney López Dog Whistle Politics, Anat Shenker-Osorio Communications, Brilliant Corners.

Review the research

Queering reproductive justice toolkit

Advocacy tool for those working on reproductive and LGBTQ issues.

Source: National LGBTQ Taskforce.

Explore the toolkit

Working glossary of terms

Set of inclusive language principles and a working glossary of terms relating to identity, diversity and inclusion.

Produced by the EJP team.

Jump to Annex 2 for the glossary overview and principles

Messaging this moment: Handbook for progressive communicators

Written by Anat Shenker-Osorio, the handbook includes guidance on how to effectively communicate values-based messages of inclusion.

Source: Center for Community Change.

Access the handbook and further info

Data collection

More than numbers: A guide toward diversity, equity, and inclusion (DEI) in data collection

"A starting point—to spark inquiry, conversation, disruption and, ultimately, better data collection practices within organizations."

Source: Charles and Lynn Schusterman Family Philanthropies.

View the guide

Grantee demographic data reporting template

EJP's pilot approach to collecting demographic data from grantees who would like to and are able to share this information.

Produced by the EJP team.

Jump to Annex 3 to explore the template

Grantee demographic data reporting guidance

Supplements EJP's grantee demographic data reporting form with definitions and explanations to help with filling out the form itself, best practices around collecting this data, and information about how data will be managed and used.

Jump to Annex 4 to read the guidance

Terms of reference for an independently led review of intersectional equity in the Economic Justice Program

Background

The Open Society Foundations (OSF) work to build participatory and tolerant democracies whose governments are accountable and open to the participation of all people. OSF places emphasis on addressing inequalities that cut across intersecting identities, including race, class, gender, sexual orientation, and citizenship. The Economic Justice Program (EJP) is a global program within OSF that works to promote openness, accountability, and equity in fiscal and economic systems around the world through grantmaking, impact investments, and advocacy.

EJP believes it is essential to put intersectionality at the center of its programming, not only to uphold national and international human rights standards, but also to ensure its work does not perpetuate systems of oppression so that it can fully achieve its mission of economic justice. In order to do this, EJP will undertake an assessment of the program's grantmaking, investing and contracting practices as they relate intersectionality. An enthusiastic core team representing different roles and identities within EJP is requesting this assignment and have secured funding for implementation.

Duties and responsibilities

Objective

The overall objective of this assignment is to support EJP to develop an Intersectional Equity Strategy and Action Plan. The strategy should guide the action of EJP at both the programming and operational level, and assist the program with the following:

- Establishing structures and processes that will promote effective use of an intersectional analysis in programming and operations;
- Improving staff members' understanding and the importance of intersectionality, and capacities to integrate intersectional equity in all aspects of their work.

Scope of work

EJP will commission a consultant to plan and execute a review of the program's grantmaking, investing, and contracting practices through an intersectional approach. This includes identifying a methodology to analyze and track intersectional equity in our grantmaking, investments and contracts, an assessment of the program's practices (grantmaking, investments, and contracts) as it relates to intersectional equity, and recommendations for next steps, including mutually agreed upon intersectional equity principles to guide our work. The consultant will analyze EJP and OSF's grantmaking and investment processes and interview EJP program staff to assess current understanding of intersectionality within economic justice, and how/if it is taken into account in their strategy and in fielding grantees, investees, and consultants.

Through this activity, EJP expects to gain a better understanding of intersectional equity, and have the tools to better use an intersectional approach into organizational culture, strategy, and impact tools. EJP looks forward to receiving specific recommendations for next steps and ways to continually monitor and track this information.

Questions to be answered

- To what extent does EJP consider and use effective principles and practices around intersectional equity in grantmaking, investing, contracting, and programmatic operations —both in how resources are spent and who receives funds?

- How do formal and informal practices act as barriers or enablers of intersectional equity, including their impacts on EJP's ability to work effectively in different contexts?

- What concrete steps should EJP take to move towards a more equitable operational model in the short, medium and long term? How can we effectively track progress?

Key deliverables

The consultant is expected to:

1. Work with staff to gauge:

   a. the knowledge and understanding of intersectionality, including areas where further capacity development seems warranted;

   b. how/if their work is impacted by intersectional equity—to be done by portfolio as well as per unit as a whole; and

   c. their commitment to advancing an intersectional approach in their work, in how it manifests itself in actual grantmaking, investing, and contracting practices;

   d. if, where, and how intersectional equity considerations have factored into their grantmaking, investing, contracting, or operational decisions.

2. Review existing formal and informal OSF/EJP grantmaking, investment, and contracting protocols, strategies, work plans and other related materials via desk review and staff interviews

3. Work with the team to devise a set of intersectional equity principles that clearly outline a shared set of ambitious commitments we want to undertake in our work

4. Produce an internal written report with findings and specific, actionable recommendations and prioritized implementation roadmap with timelines and estimated budgets; report should assess current EJP standing relative to the team's newly refined principles

5. Present findings to EJP staff or other interested OSF parties to review conclusions, recommendations, and to plan the implementation process

6. Create a public-facing, possibly co-authored blog post for the EJP website on conclusions drawn from the assignment

This information will be used to inform grantmaking, investing, and contracting moving forward and will provide EJP with resources to help monitor the team's DEI progress. The intention is for EJP to be the primary users of the assignment's recommendations, but it will also be shared with the greater OSF community and with EJP's grantees. Publically facing materials will be posted to EJP's website.

Expected timeline and budget

Work to begin in August and be finished in September (8 weeks)

Proposals under $25,000 strongly encouraged.

Reimbursable expenses: Travel to OSF offices

Draft Report due date: Friday, 30 August 2019

Final Report due date: Monday, 30 September 2019

Candidate profile

The consultant should have a background in diversity, equity and inclusion, and substantial experience assisting organizations in the non-profit sector to apply an intersectional equity approach across a range of activities, both external and internal. Should also be comfortable with ideas in principles-focused evaluation. Experience working with grant-making foundations and international programming would be desirable.

How to apply

Interested candidates should send an updated CV, and a brief cover letter describing their interest in the work, the qualifications and experience that they bring, the key questions that this TOR elicits for them, the feasibility of the questions we have put forward, and an initial quote for undertaking the consultancy on the timeline identified. We will also consider a team of consultants.

Deadline for submission of proposals: Monday, 10 June 2019.

Overview to the EJP inclusive language guide and glossary

This guide is intended to act as a point of reference for Economic Justice Program (EJP) staff to understand commonly used inclusive terms and concepts and help identify appropriate language. It also provides practical examples of preferred terms and phrases. This is not simply a list of terms that need to be learnt; it is designed to support and encourage EJP staff to use appropriate language to communicate in a more intentional and inclusive way.

This document is not intended to be an authoritative or comprehensive handbook. Language continuously evolves and appropriate terminology changes in response to sociocultural shifts. Thus, this guide will be revised over time. Furthermore, absolute definitions are not only difficult to compose, but also involve exercising immense power and this is not the goal of this EJP document.

What is inclusive language?

Inclusive language acknowledges diversity, conveys respect to all people, is sensitive to differences, and promotes equal opportunities. The purpose of inclusive language is to avoid word, phrase or tone choices that reflect prejudiced, stereotyped or discriminatory views of particular people or groups. Using inclusive language helps reduce stereotyping, promotes social change and contributes to achieving justice. Inclusive language is sometimes called non-discriminatory language. Users of this guide are encouraged to keep in mind that the EJP operates primarily in anglophonic spaces.

Why words matter?

Language effectively reflects and influences perceptions, behaviors and attitudes. Paying attention to the language we use can give us a greater understanding of our culture, politics, and debates. Given the key role of language in shaping cultural and social attitudes, using inclusive language is a powerful way to promote justice and eradicate biases.

Inclusive language and EJP

The words we choose reinforce our attributes and values. EJP, through its key values, is committed to promoting practices that build more equitable, sustainable, and democratic societies. The language used should therefore reflect this. Inclusive language can play an important role in acknowledging everyone and treating all people equitably, and with the sensitivity and respect to which they are entitled.

"You must be careful about the words you use, and that are used in your house… Words, are things that get on the walls. They get in your wallpaper, they get in your rugs, in your upholstery, in your clothes and finally into you."—Dr Maya Angelou

Guiding principles

1. Cultivate self-awareness. Notice what type of language you are using and if it excludes particular people or groups. Avoid expressions that reinforce stereotypes.

2. Engage people and respect their preferences. Try to include language that reflects people's choice and style in how they talk about themselves. When referring to or addressing specific individuals, use forms of address and pronouns that are consistent with their gender identity. Keep in mind that a person's gender identity may change over time; be open to changes in gender pronouns. Wherever categorization and labels are used to oppress groups of people, self-identification becomes an act of resistance. At the same time, people who are robbed of opportunities to self-identify lose not just words that carry political power, but may also lose aspects of their culture, agency, and spirit. If you aren't sure, ask!

3. Do not make personal attributes visible when it is not relevant for communication. Language that refers to personal attributes such as race, ethnicity, class, gender, sexual orientation, disability or age, for example, usually tend to over-emphasize the distinguishing attribute. Avoid the use of such language unless it is valid and relevant to the discussion. Any group characteristics should always be applied with care and consideration, with an awareness of the diversity of the audience, and always be expressed in inclusive terms.

4. People-first language aims to make personhood the essential characteristic of every person. People-first language views other descriptive social identities that people may hold as secondary and non-essential (e.g. "a person with diabetes" instead of a diabetic). Strict adherence to people-first language can lead to awkward sentence construction and may not align with reclamations of social identities. However, attuning to our shared humanity by telling stories that center people first, rather than exploiting identities, should be an aim of our writing.

5. Hold those around you accountable. Don't be afraid to correct those around you about using exclusive language but do understand not everyone receives criticism in the same way. Address the situation with the person privately (in person or through a message) by briefly explaining what exclusive language is and how it can often result in people feeling discriminated. Pay attention to which responses work better for certain people.

Grantee demographic data reporting template 2021

"How we collect demographic data also represents how we determine who is important— who is seen and who is erased, who counts and who does not."—<u>More than numbers</u>

Introduction

EJP is committed to advancing a vision for economic justice that leaves no one behind. Yet we also recognize that we still have a lot to learn about how we- and our partners- can best promote and strengthen ***intersectional economic justice*** both within our own organizations and our communities. While we strive to understand how intersectionality influences our work, EJP is currently at the point of unpacking diversity, equity, and inclusion (DEI) as well as understanding demographic data- and the identities represented in this data- in a global context. We, too, are learning.

We believe that having a better understanding of who we are (and are not), who we work with (and don't), and our values around DEI is crucial for us to reflect upon and improve how we aim to achieve that vision. We see a need to gather organizational information (where possible, available, and legally permitted) that will allow for open dialogue around the following questions:

- Where are our blindspots? For example, do our collective decisions and practices exclude certain groups, types of organizations, or people?

- Are there trends, gaps, and barriers across the range of organizations we support globally that speak to systemic issues that we should be addressing?

- How can DEI data inform decision-making that leads to more equitable outcomes around economic justice?

Starting in 2021, we will pilot this approach with grantees who would like to ***voluntarily*** share ***aggregated*** demographic data with EJP. Additionally, any feedback about the form and process will be used to improve it. In 2022, we plan to start including this form as part of the standard required proposal packet materials.

We are aware that data collection in general can be difficult and want to stress principles of voluntary participation, flexibility of this form, and emphasis on data protection should you choose to share this data with us. You can find more information about these in the attached guidance.

We believe that this process is about more than just counting numbers and submitting a form. We hope you take this as an opportunity to listen and learn about the unique experiences of individuals, to reflect on your own organizational values, and to engage in critical conversations with staff, board members, and us around DEI and intersectionality.

Data collection form

Please complete this form to the best of your ability. There are seven sections: the first contains general questions relating to DEI within your organization; the other six sections ask about demographic data. We encourage you to use the narrative boxes to provide more information where applicable. If you have any questions or concerns, please refer to the accompanying demographic data reporting guidance or get in touch.

1. Organizational information

a. What does your organization do to promote DEI internally? Feel free to share any plans, write ups, or other information that may describe this work in greater detail.

b. Please describe what goals, if any, your organization has developed around DEI? How do you track progress against these goals?

c. Does your organization regularly collect demographic data about board members/staff?

☐ Yes   ☐ No

If so, (what, when, how, etc.). If not, what might be standing the way?

d. What, if any, frameworks or definitions do you use to understand different identities or characteristics in your organizational context?

e. Thinking about the people that your work aims to serve (both directly and indirectly), do you feel that your board, leadership, and staff adequately represent this group(s)? If not, what gaps or disconnects may warrant further consideration?

f. Please provide the following information for your organization:

Number of board members:	
Number of leadership staff:	
Number of **total staff**:	

2. Country or nation of origin data

What we are aiming to understand: Is your organization composed of individuals who are from your operational location(s) or from location(s) of intended impact? Collectively, are there geographic gaps in where we fund?

☐ This information can't be collected in our context because it is unlawful, irrelevant to our context, uncomfortable to do so, or another reason.

Note: Please fill in the table below with all relevant classifications.

Country or nation of origin	# of board members	# of leadership	# of total staff
Prefer not to say or information not available			

Briefly share any relevant additional information or insights relative to these data.

3. Race and ethnicity data

What are we trying to understand: Is your organization composed of racially and ethnically diverse staff and board and - if applicable- representative of the racial or ethnic group(s) that you intend to serve? Collectively, do we adequately fund organizations that reflect populations that are usually marginalized?

☐ This information can't be collected in our context because it is unlawful, irrelevant to our context, uncomfortable to do so, or another reason.

Note: Please fill in the tables below with all relevant classifications. Organizations from different contexts may better identify with *either* Race or Ethnicity *or* both Race and Ethnicity. Use either or both tables as applicable.

Race	# of board members	# of leadership	# of total staff
Prefer not to say or information not available			

Ethnicity	# of board members	# of leadership	# of total staff
Prefer not to say or information not available			

Briefly share any relevant additional information or insights relative to these data.

4. Age data

What are we trying to understand: Is your organization composed of staff and board members from a diverse range of ages (as legally permissible) and, if applicable, representative of the age group(s) that you intend to serve?

☐ This information can't be collected in our context because it is unlawful, irrelevant to our context, uncomfortable to do so, or another reason.

Age	# of board members	# of leadership	# of total staff
18–30			
31–40			
41–50			
51–60			
60+			
Prefer not to say or information not available			

Briefly share any relevant additional information or insights relative to these data.

5. Gender data

What are we trying to understand: Is your organization composed of staff and board members of all genders- and if applicable- representative of the gender groups that you intend to serve?

☐ This information can't be collected in our context because it is unlawful, irrelevant to our context, uncomfortable to do so, or another reason.

Note: We are aware of the fluidity and complexity of gender and have landed on these categories with some guidance from here and here.

Gender	# of board members	# of leadership	# of total staff
Female / woman			
Male / man			
Non-binary			
Prefer to self-describe. Please share descriptions in the "Additional information" box.			
Prefer not to say or information not available			

	# of board members	# of leadership	# of total staff
Transgender			
Not transgender			
Prefer not to say or information not available			

Briefly share any relevant additional information or insights relative to these data.

6. Sexual orientation data

What are we trying to understand: Is your organization composed of staff and board members who identify with different sexual orientations- and if applicable- representative of the sexual orientation(s) of the group(s) that you intend to serve?

☐ This information can't be collected in our context because it is unlawful, irrelevant to our context, uncomfortable to do so, or another reason.

Note: We are aware of the evolving vocabulary and the potential sensitivity around collecting data on sexual orientation. We have landed on these categories with some guidance from here.

Sexual orientation	# of board members	# of leadership	# of total staff
Gay, lesbian, bisexual (or any identity within the LGBTQIA+ community)			
Heterosexual / straight			
Prefer to self-describe. Please share descriptions in the "Additional information" box.			
Prefer not to say or information not available			

Briefly share any relevant additional information or insights relative to these data.

7. Disability data

What are we trying to understand: Is your organization composed of staff and board members with different abilities- and if applicable- representative of the abilities of the group(s) that you intend to serve?

☐ This information can't be collected in our context because it is unlawful, irrelevant to our context, uncomfortable to do so, or another reason.

Disability	# of board members	# of leadership	# of total staff
Identifies as a person with a disability / disabilities			
Identifies as a person without a disability			
Prefer not to say or information not available			

Briefly share any relevant additional information or insights relative to these data.

Grantee demographic data reporting guidance 2021

This guidance is created as a supplement to EJP's grantee demographic data reporting form. It contains definitions and further explanations to help with filling out the form itself, best practices around collecting this data, and information about how this data will be managed and used.

Overview

Data collection (particularly around DEI) is not an easy task. We are aware that there is incredible variation in the meaning of DEI and intersectional equity across contexts and fields. We are also cognizant of resource and time constraints that limit the ability to have perfect or complete data. We want to reiterate that **this form is voluntary**, though we do hope you see how this information can be useful for both your organization and for our partnership. Here are a few other tips:

- **Don't answer questions that are not relevant in your context.** EJP supports work globally with a wide array of partners. If questions are not applicable or privacy laws prevent your ability to collect certain data, let us know and skip the question(s).

- **Already have a format that captures this info? Share that instead.** Many organizations have ongoing efforts to collect these data for internal purposes and/or for other funders. If this applies to your organization, share what you already have (in lieu of this template). We can then decide together if further information should be submitted- and how & when.

- **Focus on gathering information about leadership and board positions if needed.** We definitely know that organizations are much more than their leaders and boards, and therefore, prefer to have data reflective of the whole organization where possible. Time constraints, resource limitations, big internal changes, and the status of the organization's overall DEI journey will impact the ability to obtain more comprehensive data. If this is the case, focus on the board and leadership for now, and we can work together and discuss how to improve these data over time.

We are here to support your efforts, so please reach out if this is at all overwhelming or if you have questions, concerns, and/or feedback about this process and form. We have tried to make this form adaptable to different contexts, but there are certainly many areas that can be improved. **If you feel like you're trying to fit a square peg in a round hole while completing this request, we're doing something wrong and want to fix it. We're committed to learning with you and appreciate guidance from our partners.**

Definitions

See '<u>Dimensions of diversity & identity</u>' in the AAUW Diversity, Equity & Inclusion Toolkit for more in-depth explanation of some of these definitions.

Term	Definition
Country or nation of origin	The country where someone (or someone's family) comes from.
Disability	A physical disability is a condition that negatively affects a person's stamina, dexterity, mobility and/or physical capacity. These conditions range from hearing impairments to cerebral palsy. A mental disability is when a person cannot develop cognitively at the same rate as most other people.
Diversity	The variety in identities and lived experiences (and the overlap among them) that give meaning to our identity. The unique combination of these are what make us different and unique.
Equity	Everyone has equal access to what they need to be successful, with an awareness that those needs can be quite different.
Ethnicity	Ethnicity relates to a group of people who share some cultural characteristics, such as customs, language, food etc. Example list of ethnicities from Kenya: Kikuyu, Luhya, Kalenjin, Luo, Kamba, Somalis, Kisii, Mijikenda,, Meru, Maasai, and Turkana
Gender	Gender refers to the characteristics, behaviors, roles and norms that we ascribe to women, men, girls and boys. It often manifests itself through the concepts of masculinity and femininity, however gender exists on a spectrum, with each of us lying somewhere along that continuum. Our gender expression can be seen in how we look, how we dress and how we describe ourselves — right down to pronoun usage.
Inclusion	Behaviors and actions that make us feel welcomed or not.

Term	Definition
Intersectionality	The ways in which different aspects of our identity overlap and interact to uniquely shape how we experience systems of privilege and oppression.
Race	A social construct that creates a division of groups of people based on perceived inherited physical differences. Example list of race from South Africa: Black African, Colored, White, and Indian/Asian
Sexual orientation	Sexual orientation is an inherent emotional, romantic or sexual attraction to other people. People may express their sexual orientation in different ways (see the AAUW toolkit).

General good practice for DEI data collection

- Create clear messaging to staff and board members why this data is being collected and how it will be used.

- Ensure *voluntary* participation for each staff member.

  - Ask individual staff for consent prior to disclosure of this information

  - Individuals should self-identify and disclose information without pressure. Individuals should never be categorized, labeled, or identified without their knowledge or consent. This is especially true for demographic information related to invisible or less visible aspects of individual diversity like ability status, sexual orientation, or gender identity.

- Create a data management plan for how your organization will collect, store, and distribute this data.

Data management plan

We aim to be fully transparent in how we will store, analyze, and use this data. Here you will find a brief overview about our data management plan. There are two high-level takeaways:

- **We take data protection seriously.** We are proactively taking measures to ensure that this dataset does not include personal identifiable information (PII). If any data received contains PII, that data will be permanently deleted from our dataset.

- **Data collected will be reviewed and analyzed for internal purposes only.** OSF takes data protection very seriously. All information will be for internal purposes only and under no circumstances will be shared outside of OSF.

The specifics of each step of the data process are as follows:

1. Data collection

   a. Data collected in 2021 are voluntary, limited to organizations that are willing to try it and give us feedback. Data collected in 2022 onward will be required as a part of the proposal process. Organizations will fill out this form yearly. Data will be collected directly on this form OR a similar form used elsewhere. Submitted data should be aggregated and submitted with no PII. If any data received contains PII, that data will be excluded from our dataset and permanently deleted.

2. Data storage and access

   a. Data will be collated into an Excel spreadsheet that is stored on Box. When EJP's Salesforce-based information management system is live (end of 2021), data will then be entered and stored in this database. All members of the EJP team will have the ability to access and view this data both on Box and within the database. No other people will have access to this data unless a relevant need is identified and they have explicit permission granted by EJP staff.

3. Data analysis

   a. Initial analysis for data collected in 2021 will be within Excel. Once the Salesforce database houses these data, analysis for many of the quantitative data points should be automated and displayed on dashboards. Qualitative data will likely be analyzed manually.

4. Data use

   a. The primary uses of these data are to:

   b. Supplement dialogue about DEI within the context of specific grantee relationships and

   c. Inform overall EJP strategy and decision-making.

All information will be for internal purposes only and under no circumstances will be shared outside of OSF.

Quick research on intersectional equity and philanthropy

Version: October 22, 2020

Explicitly on strategy

- **People, place, and power: Advancing racial and economic equity** (San Francisco Foundation's "Equity Strategy Development", 2018): SFF kept coming as a good example of a Foundation able to center equity in their work; these are lessons learned from SFF's centering of racial equity, two years after they announced their intent to focus their entire program strategy on racial equity and economic inclusion.

  - "It continues to be a leader not only in its grantmaking to organizations with leadership teams comprised of a majority of people of color but also in serving as a civic leader and voice for change in the Bay Area concerning issues of equity. Others have followed in SFF's footsteps—most recently Chicago Community Trust (CCT), one of the nation's oldest community foundations, which decided to anchor more heavily on racial equity in its strategic plan for the next decade." Bridgespan's report on foundations doing racial equity work; CCT's strategic plan is here.

- **Incorporating racial equity and inclusion into institutional strategy** (Race and Equity in Philanthropy Group (REPG), Summer 2020): Profiles of five foundations that incorporated racial equity into their strategy: Winthrop Rockefeller Foundation, The San Francisco Foundation, W.K. Kellogg Foundation, The California Wellness Foundation, and East Bay Community Foundation.

- **Integrating racial equity in foundation governance, operations, and program strategy** (Consumer Health Foundation, 2014): CHF's experience integrating racial equity in their governance and operations.

More general tools/resources on operationalizing intersectional equity for philanthropy

- **Operationalizing equity:** putting the Annie E. Casey Foundation's racial and ethnic equity and inclusion framework into action

- **The Philanthropic Initiative for Racial Equity (PRE):** Organization dedicated specifically to racial equity in philanthropy

    - Grantmaking with a Racial Justice Lens: A Practical Guide

    - Infographic on What Philanthropy needs to know to prioritize racial justice

    - Paths along the way to racial justice: Four foundation case studies in Critical Issues Forum Vol. 5. Moving Forward on Racial Justice Philanthropy report

    - Catalytic change: Lessons learned from the racial justice grantmaking assessment: Lessons learned from piloting a Racial Justice Grantmaking Assessment in two foundations

- **Power moves:** Your essential philanthropy assessment guide for equity and justice (National Committee for Responsive Philanthropy, 2018)

- **Advancing the mission:** Tools for Equity, Diversity, and Inclusion (Anne E. Casey Foundation, 2009): A little dated but has overall practical steps to incorporate DEI within Foundation work

- **Checklist for DEI in grantmaking** (Equity in Philanthropy)

- **Advancing racial equity in philanthropy:** A scan of Philanthropy-Serving Organizations (United Philanthropy Forum, Feb-May 2018, funded by Ford and Kellogg Foundations, Full report): Report with results from a survey done on PSOs about their racial equity work

    - 43% of survey respondents define their racial equity work as "just beginning"

    - 51% of survey respondents have been engaged in racial equity work for a longer period of time but don't consider their efforts as "advanced"

    - Nearly one-third (32%) of scan survey respondents identified specific strategies or strategic frameworks that their PSO has developed and is using to guide its work on racial equity. A number of other PSOs noted that they are working to develop such strategies and frameworks.

        - Using an anti-racist intersectional frame at CSSP (Center for the Study of Social Policy, 2019)

        - Many resources here, not all of which are limited to philanthropy

Funder networks & organizations to follow (copied from [The Philanthropic Initiative](#))

- **ABFE: A Philanthropic Partnership for Black Communities:** ABFE is a membership-based philanthropic organization that advocates for responsive and transformative investments in Black communities. Partnering with foundations, nonprofits and individuals, ABFE provides its members with professional development and technical assistance resources that further the philanthropic sector's connection and responsiveness to issues of equality, diversity and inclusion.

- **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. CHANGE Philanthropy's 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.

- **D5:** In 2007, 50 foundations and allied leaders began the Diversity in Philanthropy Project (DPP), a time-limited campaign to expand diversity in the field. D5 was the culmination of this effort. D5 was 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.

- **Funders for Justice:** A national network of funders increasing resources to grassroots organizations addressing the intersection of racial justice, gender justice, community safety, and policing.

- **Funders for LGBTQ Issues:** A network of more than 75 foundations, corporations, and funding institutions that collectively award more than $1 billion annually, including approximately $100 million specifically devoted to LGBTQ issues.

- **Justice Funders:** Justice Funders is the home of Bay Area Justice Funders Network while also (1) offering professional and leadership development programs, (2) providing coaching and consulting for organizational transformation; and (3) designing, piloting and scaling innovative collaborations that advance social justice movements. By engaging in these multiple areas of programming, Justice Funders is ushering a [Just Transition](#) within the field of philanthropy to take a proactive role in building the world we need.

- **Neighborhood Funders Group:** A network of national and local grantmakers throughout the U.S. that brings together funders to learn, connect, and mobilize resources with an intersectional and place-based focus.

- **Philanthropic Initiative for Racial Equity (PRE):** PRE aims 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.

- **Racial Equity in Philanthropy Fund:** a collaborative effort of the W.K. Kellogg Foundation and the Ford Foundation and builds on each institution's efforts in the philanthropic sector (Borealis Philanthropy)

Intersectional equity review plan

The staff-led action plan set out the following:

Category	Which of the six categories does this fall under? Note: MEL cuts across ALL. 1. Contracts 2. Culture 3. Grants 4. Investments 5. Operations/management/governance 6. Strategy, standards, and benchmarks
Key objective	What are we working towards? Think of more "proximate North Stars"
Benchmark(s)	What does "good" look like for us?
Proposed activities	What types of actions and activities will be taken to move to the benchmark?
RACI	Who will be: • **responsible** for the activities? • **accountable** for our progress towards benchmarks? • **consulted** in designing and implementing activities? • **informed** of changes, decisions, and actions?
Activity phasing	What comes first? What activities are dependent on other activities happening? What is the planned timeline?
Annual targets	What are the annual milestones that we are working towards on this objective? Hint: they should be related to the benchmark and key objectives
Proceed OR wait until after EJP capacity-building training?	
Cost / staff capacity implications	Where applicable

The key objectives identified under each category were as follows:

Contracts

1. EJP implements and adopts a fair, transparent, and systematic procurement & contracting process that includes IE criteria and considerations

2. EJP staff will increase spending to a more diverse set of vendors and contractors, creating annual benchmarks based on baseline and annual data

3. EJP to lead the way in developing a more inclusive contracting process throughout the OSF network

Culture (of learning and commitment)

1. Design realistic, learning-focused, and multi-format exposure and conversation opportunities for EJP staff on IE (plans should include bringing in outside experts and/or support) (learning)

2. Identify and curate existing resources (especially within OSF) for staff to refer to/use in their own IE education/journey (commitment)

3. Coordinate with OSF teams working on similar initiatives (commitment)

Grants

1. Principles and resources: EJP team has strong grantmaking principles around IE informed and periodically reviewed based in our internal learning and external evidence

2. Practices and skills: EJP grantmakers have clear IE ambitions, targets, data collection and accountability processes at grants level that support learning on IE grant-making

   a. Organizational assessments: Strengthen EJP grantmakers' organizational assessment practice about IE

   b. Participatory practices: EJP increases the use of participatory practices in grantmaking and learn from these experiences to inform grant-making principles and practices

3. Knowledge and learning: EJP grantmakers are well-equipped with the necessary knowledge and skills to analyze, discuss and transform their own practices and their grantees practices around IE

Investments

1. Sourcing principles are implemented that include IE criteria and considerations and which reflect a clear and transparent intention to find investment opportunities derived from the communities SEDF is aiming to serve.

2. Investments comply with SEDF investment principles, which include IE criteria/considerations. All investments include a proactive IE assessment and associated plan for addressing any gaps/issues.

3. SEDF team effectively monitors and raises IE issues with investees.

4. SEDF staff have a better understanding of IE definitions and considerations, how to apply those considerations to the investment practice, and how to discuss IE issues with investees.

Operations/management/governance

1. EJP Hiring Managers have clarity on how they can execute a transparent recruitment/orientation/personnel/redundancy consideration process that includes an IE analysis at all levels of hiring.

2. EJP staff incorporate concrete forms of GIE good practice into their respective roles and demonstrate successes and failures against stated objectives.

3. EJP / SEDF governance structures are diverse in composition, experience and thought, and actively help EJP maximize its global impact.

4. EJP identifies existing gaps and biases stemming from existing OMG structure and develops compensating practices

Strategy, standards, and benchmarks

1. Planning & analysis: EJP teams have clear, well-defined ambitions with associated targets and baseline data related to IE integrated into their strategies and are operationalizing them

2. Monitoring & learning: EJP Portfolio & Enabler teams have an improved understanding of and ability to track how intersectional equity issues play out in portfolio and pillar strategies (problem and solutions/responses)

3. Accountability for program implementation and decisions: EJP operating under clear accountability expectations in relationship to IE and programmatic decisions/work

4. Communications: EJP has clear guidance on inclusive language, has a publicly available commitment to IE accompanied by disclosures demonstrating implementation, and strong mechanisms to ensure that external communications reflect IE commitments including preferred terminology. [We are able to effectively communicate with an IE lens and public materials reflect IE commitments.]

5. Knowledge sharing: Documentation of Design Process, Progress and Lessons Learned

In late 2018, the Open Society Foundations made a bold new commitment to fighting economic injustice. Through a merger of OSF's existing Fiscal Governance and Economic Advancement Programs, the Economic Justice Program (EJP) was formed and tasked with designing the Foundations' first-ever global economic justice strategy.

Due to changes in OSF leadership, the decision was made in late 2021 to centralize the Foundations' cross-cutting global work, which meant the closure of individual thematic programs including EJP. It is understood that key elements of EJP's designed strategy will be taken forward by a new central unit. Final decisions are likely to be confirmed by early 2023.