From Implicit to Explicit
Lessons for supporting funders in advancing racial equity in philanthropy
**Who Participated in the Cohort?**

54 participants from 27 ICoF member organizations representing 38% of our network

**Member Type:**
- Corporate Foundations: 33%
- Private Foundations (including OSOs): 33%
- Community Foundations: 19%
- Re-granting Organizations: 15%

**Asset Range:**
- $10M — $600M

**Race:**
- 9% — Non-White
- 91% — White

**Who Participated in the Cohort?**

Looking back on the last five years, the work we have done to advance racial equity in philanthropy in Iowa was all about timing. We listened, we learned, we committed, and we led at the critical moments to support our network. We listened to our members as they shared about needs in their communities and the growing disparities communities of color were facing in Iowa. We learned from experts about the importance of race-explicit language in building strategies to address the needs of people of color. We committed to supporting this work by adopting a strategy to advance racial equity in philanthropy in Iowa.

And, after all of that deeply intentional work, it was time to lead by inviting our members to walk with us on a racial equity journey – one we learned would be a life’s journey.

Our members responded to the invitation by engaging in a year-long Racial Equity Cohort. In fact, nearly 40% of our member organizations chose to strengthen their commitment to race equity with us. It’s not often that we begin something at the Iowa Council of Foundations (ICoF) without a clear end in mind, but when it came to designing this cohort experience, we knew our model needed to evolve.

Instead of a prescriptive peer-learning experience, this cohort was emergent. Instead of leading ourselves, we relied on experts in the field, trusted facilitators and leaders within our network. Instead of a one-size-fits-all approach, this cohort allowed participants to navigate their own learning agendas. Because of these important shifts, we found a formula that led our members to positive growth and change within themselves and within their organizations and communities.

We hope this report about advancing racial equity in philanthropy and moving networks toward adoption can serve as a guide for the field. As was expressed over and over again throughout our network. Instead of a one-size-fits-all approach, this cohort allowed participants to navigate their own learning agendas. Because of these important shifts, we found a formula that led our members to positive growth and change within themselves and within their organizations and communities.

In partnership, Kari McCann Boutell President

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**5-Year Strategy**

There was a great deal of intentionality in preparing our members for racial equity work. Beginning in 2017 with the launch of our ICoF Foundation Openness Cohort, members have been on a journey – together – learning about these themes.

Our programming was strategically sequenced so members built their knowledge in continuous ways, fostering readiness for deeper engagement with racial equity programming and change. At the same time, we strengthened our internal capacity by invigorating in racial equity learning and strengthening our policies and practices.

**5-Year Strategy**

**2017**

- Launch of ICoF Foundation Openness Cohort
- Strengthening Your Foundation’s Openness

**2018**

- Year 2 ICoF Foundation Openness Cohort
- Developing Your Foundation’s Openness

**2019**

- Board approves ICoF Initial Equity statement and adopts new strategic priority to advance racial equity in philanthropy in Iowa
- Refresh of employee handbook, policies & practices
- Continued staff development & learning

**2020**

- Staff participates in United Philanthropy Forum’s Racial Equity Peer Learning Cohort
- Salary range policy approval for ICoF job board to support equitable hiring practices
- Continued staff development & learning

**2021**

- ICoF Board book discussion & dialogue on reimagining philanthropy in Iowa
- Strengthening strategies to support internal work
- Statement & commitment to advancing racial equity
- Revamp of hiring processes and documents
- Continued staff development & learning

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Motivations for Participation

Here’s what participants said in their applications...

**ACCOUNTABILITY TRIOS**

- **Purpose:** Members met in trios outside the large-group sessions. These self-organizing groups provided positive pressure for action and accountability. It was also a source of support to help each member develop the courage and confidence that change-making requires.

- **TACTICS & DISCOVERIES**
  - **Design:** All organizations completed the pre-assessment. Only two did not complete the full post-assessment. This demonstrates impressive commitment from members.
  - **Results:** We pulled in wisdom from the field and included ideas from authors and articles including attribution of the source. We then added items that were relevant to our members in Iowa.
  - **Emergence:** We considered using caucusing to divide the groups, but BIPOC participants did not indicate this was a priority in their applications. However, in our second session, a need for this emerged. We were able to connect BIPOC members of ICoF to a BIPOC Mentor Circle that was being facilitated by an ICoF member, Volunteer Iowa.

- **Lessons:** Peer-coaching was instrumental in helping members take ownership and experiment.
  - Accountability trios were described by participants with the following words:
    - Connection
    - Genuine
    - Support
    - Trust
    - Honesty
    - Grace
    - Solidarity

- **ASSESSMENT**
  - **Purpose:** To provide an opportunity for funders to reflect on where racial equity could be applied, internally and externally.
  - **Results:** To identify and change practices, resources we provide in volunteer and operations, funding and included ideas from authors and articles including attribution of the source.

- **CURATED RESOURCES**
  - **Purpose:** To make the large number of REDI philanthropy resources more accessible and usable by our members, especially tools that could provide more specialized information.
  - **Design:** Curated racial equity in philanthropy resources and new tools to apply your learning to your work. Included live links, length, summary and categorization to make sorting easier.

- **Out of the many helpful articles about racial equity in philanthropy, we anchored our cohort around one in particular: Operationalizing Racial Justice in Non-Profit Organizations by Maggie Polachuk with MP Associates. We used it to categorize breakout groups, discuss definitions, develop goals, and for interested members, dive deeply into the nuance of the ideas.

P&O Role: Between meetings ICoF was active in sharing additional resources and hosting complementary ICoF programming that provided additional opportunities for learning. Offering these as opportunities, rather than “homework,” allowed people to opt in to the offerings that matched their needs.

We grounded our cohort in beloved community. Our facilitator, Sharina Sallis, sees this as a way to invite everyone to the work. She shared, “I try to center love because we naturally think of love and so then the work doesn’t feel like work. This work is really all about shared humanity – a love for your people, for your community.”
What Did Change Look Like for Members?

This cohort focused on institutional changes in 13 capacities that can advance racial equity in philanthropy, not just fund racial equity through grantmaking. We took a comprehensive approach to help members consider all of the domains in which they had the opportunity to remove barriers to racial equity both internally and externally.

### Facilitation Matters

When thinking about who might be the best facilitator for your work, it's important to consider how participants are coming into the learning experience and how they may need to be supported. We knew our members needed the expertise and lived experience of a BIPOC leader. We knew our members place a high value in local, Iowa-grown models and stories. We knew our members needed the expertise and lived experience of a BIPOC leader. We knew

What we found is that co-facilitation was the answer for this cohort; allowing the facilitators to play for each other’s strengths and points of view. Sharina Sallis brought all of those requirements to the table and so much more including her experience as a corporate funder, community organizer and DEI expert. Sharina had also been engaged with several ICoF members and the ICoF itself. Stacy Van Gorp was a trusted colleague, having been a former member of the ICoF, a private foundation leader, and having consulted with many members.

### Member Spotlights

**Quad Cities Community Foundation**

After engaging in learning about diversity, equity and inclusion, foundation leaders put the learning to work by collecting and using data to understand patterns and make changes. Areas of data collection include board demographics of grant applicants, and demographic identity of scholarship recipients, youth philanthropists, volunteer committee members, and the Board. This led to several changes to grant programs, outreach strategies, and volunteer recruitment approaches.

**Community Foundation of Northeast Iowa**

A strategic planning reset focused on integrating racial equity approaches in each of the foundation’s strategies. To identify tactics, the foundation listened to BIPOC leaders through a survey. The feedback encouraged the foundation to implement new approaches that center equity and create a more inclusive environment. As a result, the new plan prioritized communicating more directly about racial equity. For example, a recent Annual Impact report shared nonprofit, donor and fund spotlights focused on racial equity. The plan also calls for finding new ways to communicate with BIPOC audiences, amplify Black voices, and increase inclusion through collaboration.

**Greater Cedar Rapids Community Foundation**

The Community Foundation updated its vision, mission and values to reflect their commitment to racial equity. The process included an internal DEI committee, a racial equity steering committee, and feedback from the board. In addition, a public data report and community learning event was held about advancing racial equity in their county. Foundation leaders reflected and shared in their assessment:

“This update of our identity and commitment to racial equity ensures this will remain part of our work for many years to come.”

**Otto Schoitz Foundation**

This quasi-healthcare conversion foundation found opportunities to be more explicit about racial equity in their day-to-day work. For example, adding racial equity metrics to the organization’s internal dashboard, and adding questions about racial equity strategy to annual board assessment. This year’s assessment led to an endorsement of moving ahead ambitiously. Grant press releases also presented an opportunity for explicitness. The Foundation always shared its commitment to serving people who are “vulnerable.” When appropriate, press releases are now explicit about race, ethnicity and equity in funding decisions.

**Community Foundation of Greater Muscatine**

Establishing a Racial Justice Fund and convening a community Advisory Committee of BIPOC leaders provided an avenue for engagement in this diverse rural county. Board members played a key role in the work by giving to the fund, promoting the fund, co-sponsoring community events and participating on the grant review team. The organization encouraged donations and urgency with a matching gift incentive. “The Racial Justice Fund will serve as a catalyst by deepening conversations, engaging bold ideas in eliminating racial disparities, and expanding learning platforms to collectively build proximity and center the voices of those often overlooked.”

**Iowa Credit Union Foundation**

This foundation undertook strategic planning while participating in the cohort. The timing allowed them to integrate racial equity strategies throughout their plan to support equity in both their internal and external policies and processes. Their next phase of work will utilize a dashboard to support accountability to the plan.
What Patterns Did We See?
From Beginning to End of the Cohort

1. There was positive movement in every capacity with one exception – policy.

2. Changes in the Board capacity saw the biggest gains from the beginning to end of the cohort. For example, “Board policy established regarding the organization taking a position on racial equity issues” and “Board’s awareness and understanding about racial equity” were among the top movers among the pre- and post-assessments. Engaging board members was a frequent topic of conversation during and prior to the cohort and it appears many members leaned in with their boards.

3. Grantmaking practices that were “down payments” on equitable practices (like providing general operating support and permitting fiscal agents) rose to the top at the beginning of the cohort and stayed near the top at the end. These items were well adopted and a credit to the ICoF’s work in openness and trust-based philanthropy. However, these top items were part of a small proportion of assessment items that were not explicit about race or advancing equity.

4. The greatest progress from pre- to post-assessment results was making racial equity more explicit in the way the organization operates and communicates. For example, the Board’s commitment to advance racial equity, developing shared language, amplifying BIPOC leaders, sharing demographic data, and discussing racial equity with donors. Building confidence in discussing racial equity internally and externally was an explicit goal of the cohort and was achieved by many members.

5. Using policy to advance racial equity remained the least adopted strategy at the beginning and at the end of the cohort. The pre- to post-assessment showed slightly negative progress.

“Despite all of the work we felt we’ve done in the past, it has not been strategic or concentrated. [The assessment] made it clear we have our own internal work to focus on.”
Shifting Approaches for Philanthropy-Serving Organizations

Reckoning with racial equity has resulted in many Philanthropy-Serving Organizations (PSOs) considering new ways of working. The Iowa Council of Foundations learned into two approaches:

1. Guiding More Strategically: Our Network’s Adoption of Change
2. Using Our Influence to Support Funder Change

Guiding More Strategically
Our Network’s Adoption of Change

"It was useful to hear from peers and colleagues across the state that they are grappling with similar issues regarding race and equity in philanthropy."*

Offerings — workshops, communities of practice, webinars, toolkits, research briefs — is the heart of a PSO’s role. In fact, this report is likely to be useful to PSOs because it describes how we offered a Racial Equity Cohort.

This section moves away from discussing a single offering to highlighting the strategic approach of delivering interwoven offerings in order to generate momentum for network adoption of racial equity policies and practices. Guiding network adoption requires a strategic approach to timing. WHEN an offering is launched, especially in relationship to other offerings and member readiness, impacts uptake and success.

So, how do you know WHEN your network is at the right moment to support movement across the adoption curve? WHEN is it necessary to lead, to follow, to push, to nudge? Looking back, we can identify the cues that helped us recognize when and how to support our members in adoption of racial equity.

THE PSO’S ROLE IN THIS PHASE:
Encourage curiosity even when members are not yet ready for action. Build awareness in order to generate interest.

PACE, BUT DON’T WAIT. PSOs don’t need to wait until lots of members are clamoring for an offering. Instead they can build demand for offerings in important areas. Hub leaders often have the privileged perspective of seeing emerging trends before they hit a tipping point into broad-scale awareness. Building demand takes time and persistence, so start with a pace you can sustain. ICoF’s racial equity network adoption process started five years ago.

REPEAT, REINFORCE, REVIST. Introduce racial equity through all of your channels and repeatedly integrate it into your existing efforts and offerings. ICoF did this by adding more articles about equity to their newsletter, and reinforced their work by asking every guest speaker to make a link between their topic and equity. They also initiated racial equity conversations with members one-on-one and with members active on the ICoF’s Board.

CONNECT THE PROCESS TO PAST SUCCESSES. For ICoF, a previous cohort that successfully explored funder openness was an on-ramp to DEI and racial equity.

THE PSO’S ROLE IN THIS PHASE:
Create ah-ha moments. Mindset shifts often precede behavior change. Serious games and table top activities from ICoF’s Openness Cohort helped funders confront patterns of bias toward particular grantseeker personas. This ah-ha opened the door to conversations about other types of bias, including racial bias. We recognized that as a moment when we could begin moving with the cohort from openness to equity.

FOCUS MATTERS. Member attention is not unlimited. PSOs should make choices about the number of priorities they’re trying to advance at one time. Focusing on adoption of racial equity means we passed on opportunities to increase adoption of other practices during the same period.

THE PSO’S ROLE IN THIS PHASE:
Highlight past projects that successfully advanced change when pushing toward new goals.

SHARE THE STORIES OF PROGRESS. Highlighting members who are working in new ways can paint the picture of network adoption for members who are still in the curiosity phase. ICoF did this through newsletters and member storytelling at quarterly membership meetings.

TIME FOR TOOLKITS, TRAINING AND EXPERTS. We acknowledge that racial equity requires adaptive organizational change and that’s messy and complex. Breaking adaptive change into manageable tactical changes can help many members during this phase of adoption. This is a time when experts, toolkits and workshops work best.

1. Not yet interested.

WHEN YOU HEAR: “I went to a national conference and there was a lot of talk about racial equity. I know it’s important but I can’t imagine how we’d do that.”

2. Ready and getting started.

WHEN YOU HEAR: “We’re interested in working on racial equity but we don’t know where to begin. Do you have some resources?”

The earlier cohort gave members practice in disclosing challenges and supporting one another while building member confidence that change was possible. PSOs should highlight past projects that successfully advanced change when pushing toward new goals.

BRAIN MATTERS. Member attention is not unlimited. PSOs should make choices about the number of priorities they’re trying to advance at one time. Focusing on adoption of racial equity means we passed on opportunities to increase adoption of other practices during the same period.

THE PSO’S ROLE IN THIS PHASE:
Provide resources and experts to answer the questions people are asking right now. Help members engage in a few “quick win” effective actions that advance the goal. Support the willing. In any network, a small subgroup of members will begin adoption earlier than others. When this happens, start shifting your facilitative energy to support the willing members. Offer workshops, webinars, and conversations that meet their needs.

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3 Making it really work at my organization.

**THE PSO’S ROLE IN THIS PHASE:** Support members in making adaptive changes to culture, power, systems, and policies. Help members persist and deepen racial equity work through peer support models.

**SUPPORT THE SHARED STRUGGLE.** Instead of traditional workshops and training that provide answers and experts, during this point in the adoption journey members need allies and spaces where they can confide, brainstorm, compare, and gain confidence to take the next steps. ICoF’s Accountability Trios were a platform for shared struggle, as was our scenario-based large group Q&A sessions when Sharina Sallis, our facilitator, would share insights and stories of her experience.

**4 Greater than the sum of its parts.**

**THE PSO’S ROLE IN THIS PHASE:** Help members to see their place in something bigger than themselves and scale adoption expectations to the network.

**RESOURCING IS THE ROLE.** Once a network grabs onto a cause, members often pull on the PSO to move faster, go bigger, and take a stand. This means finding additional funding, bringing a spotlight to the work, and encouraging late adopters to participate. It can sometimes feel like the PSO has fallen a step behind.

**SHARE POWER.** This phase is best driven by member leaders with support from a PSO. It reinforces the idea of leadership. It provides new opportunities for allies and spaces where they can confide, brainstorm, compare, and gain confidence to take the next steps. ICoF’s Accountability Trios were a platform for shared struggle, as was our scenario-based large group Q&A sessions when Sharina Sallis, our facilitator, would share insights and stories of her experience.

**SUSTAIN THROUGH SHIFTS.** Networks can slide backward on the adoption curve, especially as dynamics change. For example: How do we ensure our network will continue to go bigger, and take a stand. This means finding additional funding, bringing a spotlight to the work, and encouraging late adopters to participate. It can sometimes feel like the PSO has fallen a step behind.

**WHEN YOU HEAR:** “We’re working on racial equity and I’m running into politics and resistance from people in power. I’m not sure what to do next?”

**COHORTS AREN’T ALWAYS THE RIGHT TOOL.** In our experience, cohorts — as a platform for members to struggle together and support one another — are optimal experiences once many members have already taken concrete steps toward racial equity. Using this methodology too early can leave members looking at one another for answers that would be better provided by experts.

**WHEN YOU HEAR:** “Our network should start making some public statements about racial equity.” OR “I think we should consider commitment to these goals to be a requirement for being part of our network.”

**FIND THE NEXT WAVE.** A strength of the ICoF is its ability to scout and begin working toward what’s next. As of this writing, we’ve begun building demand and interest in examples of racial equity, documenting learnings (like this guide), and sharing the story are all important to sustaining the network as politics continue to turn divisive? Continuing to highlight support racial equity shifts when we enter a recession, or continue making grants to support racial equity.

**CENTER ON WHAT MATTERS vs. Chasing Outputs**

Our cohort centered on advancing racial equity in Iowa by changing philanthropy. Not just making grants to support racial equity.

The cohort called on funders to move beyond grantmaking and look for opportunities to strengthen and change more holistically: from staffing, to planning, to partnerships, and systems. The assessment and our sessions provided opportunities to consider 13 funder capacities.

**FOCUS ON ASSETS vs. Distracted by Deficits**

This helped us to focus where each organization — and the network as a whole — had energy for change. We followed the energy knowing that anti-racism work is ongoing without a fixed end point and that generating momentum from the start is critical for sustained action.

Taking an asset-based approach also meant resisting the urge to spend our energy convincing every ICoF member to prioritize racial equity. We focused on serving members that self-identified as ready to dig in. We made sure to notice assets outside the traditional “big two”: endowment size and number of staff. Instead, we acknowledged different approaches to change. For example:

1) We featured a small organization whose strength of analysis led to steady progress in an organization that values stability.
2) We featured a leader who used their power as a relational consensus builder to ensure progress would stick.
3) We honored the strength of a confident and out-front leader who announced a plan and asked others to come along.

"Today I learned the difference between equity and justice. That will definitely influence my perspective and approach to the work moving forward."
This cohort was not prescriptive. Each of the 27 member organizations could customize their learning and take responsibility for their own implementation choices.

This also meant members came to the cohort with an array of needs. Some were seeking accountability, others needed help deciding what to prioritize, and others sought a confidante with whom they could sort out challenges.

Variety was our answer to meeting diverse needs. Instead of one method, like a workshop, we offered four parts to the experience. Instead of one speaker, most sessions had 4 or 5 breakouts.

While we wanted to match every member’s needs every month, some cohort members experienced a mismatch with what we offered. We welcomed learning of the mismatches through surveys and one-on-one conversations and continued to adjust our approach. In one case, member needs led us to offer an extra session for corporate funders.

We were intentional about remaining responsive and not pre-designing the entire experience. Members were gracious and didn’t reject our emergent approach even though it was not always comfortable for them or for the facilitators.

Sometimes we responded to needs expressed by members. In the beginning many members asked for help with “shared language.” After we provided some definitions we recognized that the need was less about technical change and instead recognized the need to build confidence to talk about race. This led to breakout sessions where members shared their experience and gave many examples of language that worked for them.

Sometimes we pushed into the future. For example: in the last few sessions we invited members to consider adding a focus on racial justice. Powerful ideas were generated, including changing where the fundamental power of philanthropy resides. This conversation also led to an acknowledgement by a member who said (paraphrased) “just when I feel like I’m making progress with racial equity, we get the push to keep going.”

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