Hewlett Foundation OE-DEI Grants Final Report

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Table of Contents

Executive Summary

Background
The William and Flora Hewlett Foundation embraces diversity, equity, and inclusion as guiding principles – recognizing that as an endowed organization with significant resoures, the foundation holds a responsibility to operationalize DEI both internally and externally.

> **Hewlett Foundation's Commitment to DEI**
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> "As an endowed institution with significant resources, our choices about how we use our assets have consequences. In hiring staff and supporting partners to help address critical social problems, we also empower the individuals and organizations we choose. We have a duty to exercise this privilege – for it is a privilege – thoughtfully, mindful of the larger society of which we are part, and of the historical, economic, and cultural forces that shape it."
>
> Excerpted from "Committing to diversity, equity and inclusion" by Larry Kramer, Hewlett Foundation President and CEO, January 2018

In recent years, the Hewlett Foundation has recognized that for nonprofits to be effective, they must build capacity to advance diversity, equity, and inclusion (DEI). Because of that belief, they began offering organizational effectiveness DEI (OE-DEI) funding to grantees wishing and ready to build these capacities. Though the earliest of the OE-DEI grants dates back to 2006, the first intentional effort came from the education program, which began funding DEI grants in 2016. The foundation's OE-DEI grantmaking began in earnest in 2018 when the effective philanthropy group committed a special allocation of funding for these grants across program areas.

In 2019, the foundation sought to understand the various approaches staff took in making DEI grants, how grantees used the funds, what worked well, what could have been better, and what program officers can learn from their colleagues, grantees, and consultants. They hired our team at Community Wealth Partners to explore these questions through an early assessment of OE-DEI grants made to date. Our team conducted a quantitative assessment of 186 grants to trace the history of how grants were made and the activities grantees proposed to do with grant support. We also conducted a qualitative assessment that included a review of 41 grant reports submitted to the foundation and 10 interviews with 16 grantees, consultants, and foundation staff members.

Major Findings
As of July 8, 2019, the foundation has awarded $9.5 million via 186 individual grants to 77 nonprofits. The majority of grants (183) are from 2016-2019, with a spike in grantmaking in 2016 when the education program began its pilot and another spike in 2018 when the foundation's effective philanthropy group began a pilot across program areas.

OE-DEI grantmaking has grown and evolved at the foundation. While grantees have taken varied approaches to building DEI capacity, proposals most often named work around three themes: 1) training staff, 2) developing an organizational philosophy or ethos around DEI, and 3) conducting assessments related to DEI. The data show that as grantees receive additional OE-DEI grants or as their work becomes more advanced, their proposals are more focused, naming fewer focus areas.

Within the spectrum of grant proposals, the projects were categorized into early, mid, and later stages. For early-stage projects, many grantees reported **improvements in staff capacity in ways that would help build a more inclusive culture in the organization**. Examples in these reports include building knowledge and understanding of systemic racism and how it manifests in communities and organizations, management training focused on approaches that can create more inclusive workplaces, and building new skills – such as constructive listening – that contribute to a more inclusive culture. Grantees also reported an increased awareness of how DEI connects to the organization's mission, improved HR practices to help attract and retain a more diverse staff, increased comfort discussing difficult topics connected to DEI, and a plan for advancing DEI within the organization.

Relative to early-stage projects, mid- and later-stage projects reported more outcomes that connected to organizations' programs and services. Although **improved staff capacity** was also the most commonly reported area across this group, the types of capacity investments for mid- and later-stage projects were more often **in service of bringing greater equity to programs and services**. Examples of the types of staff capacity improvements reported in mid- and later-stage projects include a "train the trainer" offering to build staff capacity to educate network members about racial equity as well as skill building to equip staff to more effectively engage with community members.

Projects that fell into mid and later stages also frequently reported outcomes of a stronger and more inclusive organizational culture, a shared vision or shared capacities to advance DEI work across a network, an equity lens applied to existing programs, improved HR practices for hiring and retaining more diverse staff, new programs or strategies focused on disparities in communities served, and improved board diversity.

Considerations for Organizations Working to Build DEI Capacity

Through interviews and a review of grant reports, we sought to find practical guidance that could help inform other organizations working to build DEI capacity. Grant reports and interviews with grantees, program officers, and consultants surfaced common insights:

> **"[As consultant Angela Park says, DEI work is] 'forever work.' It's complex and takes a long time to do this well."**
>
> — Kitty Thomas, The Wilderness Society

- Anticipate complexity and difficulty.
- Be clear on how DEI connects to mission and vision.
- Balance the systemic with personal.
- Ensure leadership buy-in *and* shared ownership.
- Board and staff will likely progress at different paces.
- Partner with consultants that can bring guidance, language, and frameworks.
- Focus on depth over breadth.
- Pay attention to privilege and power within your organization.

Considerations for Funders

Grantees, program officers, and consultants also offered recommendations for the Hewlett Foundation and other foundations who want to support DEI capacity among grantees:

- Meet grantees where they are and offer flexibility.
- Provide space for grantees to learn from one another.
- Do the internal work, and adopt more equitable practices in response.

Reflections and Considerations for Future Learning

Through this assessment, the foundation wanted to know if OE-DEI grants are having the desired effect of serving as "booster shots" – in other words, helping grantees build momentum on advancing DEI inside their organizations. In short, the early answer seems to be yes. In grant reports and interviews, grantees expressed appreciation for OE-DEI funding because it helped validate the work, created space to focus on it, and provided external accountability and guidance for making progress. Because this work is complex and ongoing, grantees also appreciated the flexibility the grants often allowed and opportunities for renewal funding while they noted that this work takes far longer than a one-year grant. While every organization's approach to structuring and sequencing the work will be unique, grantees appreciated when the foundation connected them with resources and other organizations from which they could learn. Grantees, consultants, and program staff also named the importance of the Hewlett Foundation doing its own work to advance equity inside the foundation in order to be an authentic partner with grantees. There will be an opportunity for ongoing learning as the foundation makes more grants to support OE-DEI, and there are more opportunities to learn through international grantmaking how advancing DEI inside organizations looks different in different cultural contexts.

Introduction

The William and Flora Hewlett Foundation embraces diversity, equity, and inclusion (DEI) as guiding principles – recognizing that as an endowed organization with significant resoures, the foundation holds a responsibility to operationalize DEI both internally and externally. The foundation began taking an institution-wide look at DEI-related matters a few years ago, starting internally with operations and culture. As the foundation begins to shift its attention externally to integrating DEI into grantmaking and other activities, one way it is doing so is through piloting grants to build DEI capacity among grantees.[1]

Since 2004, the Hewlett Foundation's organizational effectiveness (OE) program has helped build organizational capacity through grants of targeted support to grantees across all the foundation's program areas. These grants aim to build capacity in areas such as strategic planning, leadership transition, and board development. OE grants are supplemental funding awarded to current grantees, designed to act as "booster shots" that help grantees prioritize and pursue a specific capacity-building project. Program staff award and administer these grants, and staff from Hewlett's effective philanthropy group (EPG) provide guidance and consulting support.[2]

In recent years, the foundation has increasingly recognized that for nonprofits to be effective, they also must build capacity to advance DEI. Because of that belief, the foundation has made pilot organizational effectiveness DEI (OE-DEI) grants to help build these capacities within the nonprofits that receive Hewlett funding. The pilot grants were made from 2016-2019, though three OE-DEI grants precede the pilot, with the earliest dating back to 2006. Funding has come from each of the foundation's six program areas and, more recently, from the organizational effectiveness program.

In March 2019, the foundation hired our team at Community Wealth Partners to assess OE-DEI grants made so far. Through this early assessment, the Hewlett Foundation sought to understand the various approaches staff took in making DEI grants, how grantees used the funds, what worked well, what could have been better, and what program officers can learn from their colleagues, grantees, and consultants. This is the foundation's first assessment of its OE-DEI grantmaking.

Methodology
Our team conducted a quantitative assessment of 186 grants awarded up to 2019 to trace the history of how grants were made and the activities grantees proposed to do with grant support. We also conducted a qualitative assessment that included a review of 41 grant reports submitted to the foundation and 10 interviews with 16 grantees, consultants, and foundation staff members. (For the full list of interviewees included in the qualitative assessment, see Appendix C.) From the qualitative assessment, we wanted to gain a deeper understanding of
- how grantees used OE-DEI funding from the foundation,
- what grantees learned from their efforts to build DEI capacity in organizations,
- insights and advice from consultants working with nonprofits to advance DEI inside organizations, and
- various approaches Hewlett Foundation program officers take when making OE-DEI grants and how best to support grantees in this work.

In this report we share findings from the analysis as well as case studies describing three grantees' experiences building DEI capacity in their organizations.

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[1] Read more about the Hewlett Foundation's commitment to diversity, equity, and inclusion.
[2] Read more about the Hewlett Foundation's organizational effectiveness program.

Limitations
The data available and the project scope created a few limitations worth noting. First, we hoped to gain insight into how to structure and sequence DEI work by looking at instances where grantees did not achieve all their proposed goals. In reviewing the reports, we observed that grantees responded to high-level, open-ended questions, and there were very few reports where grantees explicitly stated they did not achieve the anticipated outcomes or undertake all the activities named in their proposal. Because there was not enough data to draw conclusions from grant reports, we relied almost exclusively on interviews to gain reflections on unanticipated events or outcomes in DEI work.

In addition, the project's scope limited the interview sample size to 10 interviews with 16 people. While this sample was large enough to surface common themes and tell the stories of three grantee organizations' experiences, the interviews with foundation program staff do not represent the experiences of all staff at the foundation, and the stories of the three organizations we profiled will not necessarily reflect the path that every organization working to advance equity will take.

Finally, because the majority of grant reports available are from the education program, in most cases grantees are using their DEI grants to focus on racial equity work. While we think the insights in this report can be relevant for organizations defining DEI in a variety of ways, it is worth noting that the majority of organizations that contributed to these findings centered racial equity in their work.

For additional reflections on our process for this project, see Appendix E.

Understanding the Foundation's OE-DEI Grantmaking

This section offers a history of Hewlett Foundation's OE-DEI grantmaking. It considers what these grants look like across time, program areas, project focus areas, and stages of DEI development.

This analysis was based on DEI grants data from pilot grants made between 2016-2019, including projections for 2019 grants. Some of the analysis included 2019 projections to provide a more holistic view of the DEI grants, but much of the data and reports for the 2019 grants were not yet available. Also included are three grants that precede the pilot grants, the earliest one dating back to 2006.

As of July 8, 2019, the foundation awarded **$9.5 million via 186 individual grants to 77 nonprofits**. The foundation's education, environment, global development and population (GD&P), performing arts, special initiatives, and philanthropy programs have awarded OE-DEI grants. Most grants (183) are from 2016-2019, with a spike in grantmaking beginning in 2016 when the education program began its own pilot. The OE program launched a dedicated fund for OE-DEI grants in 2018. Before 2018, program budgets covered most of the grants, and since then, most funding has come from the OE budget while program funds continue to meet additional demand.

Figure 1: OE-DEI Grants from 2016-19
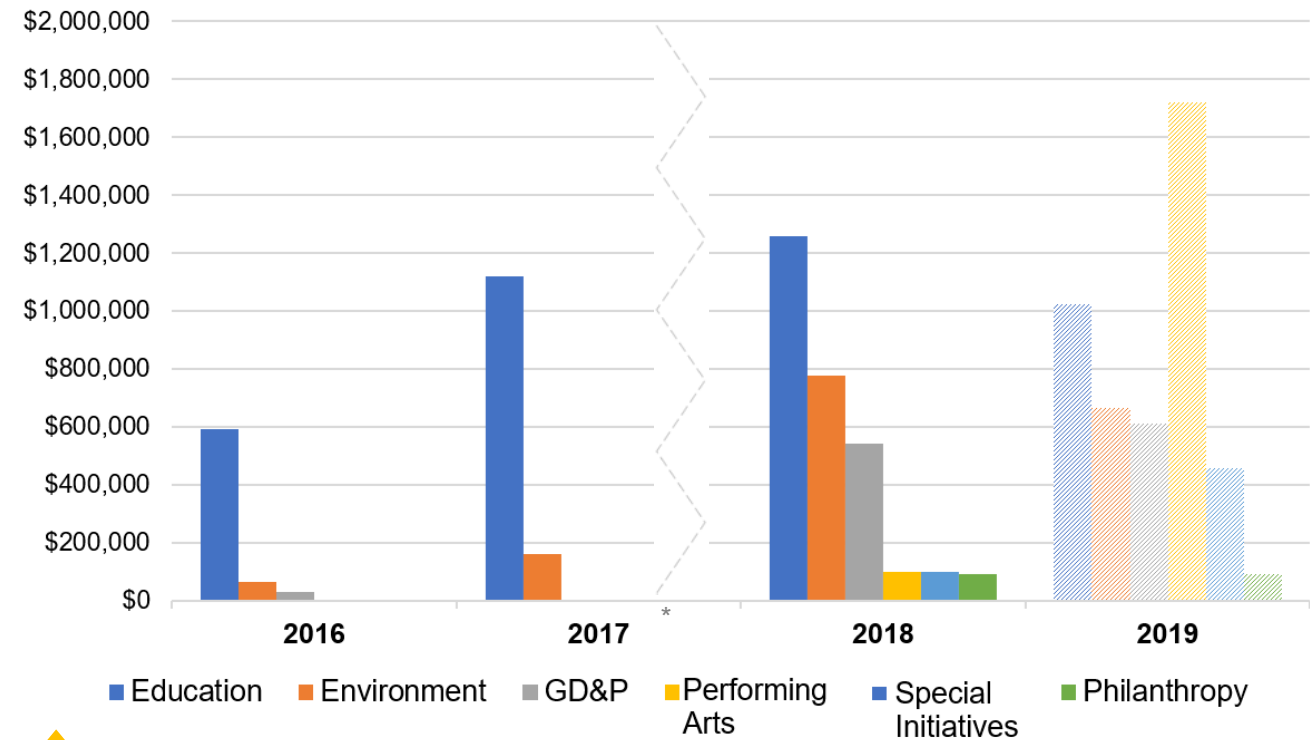
Total DEI Grantmaking	2016	2017	2018	2019
	$685,000	$1,282,000	$2,864,600	$4,566,500

n = 183 grants, including 2019 projections as of July 8, 2019
*EPG committed a special allocation of funding for OE-DEI grants in 2018

To date, the education program has awarded the most support to OE-DEI funding with $3.9 million, or 42% of OE-DEI funding during that period. Education grants are focused domestically, and most grantees have focused their DEI work specifically on advancing racial equity. In that same time period, the performing arts program awarded $1.9 million (19%) and the environment program awarded $1.7 million (18%). Of OE-DEI grants made through 2018, the average grant size ranged

from $44,667 to $72,250. On average, these grants covered 72% of the cost of nonprofits' DEI project budgets. (See Appendix A, Figures 5-8.)

Identifying Patterns Across Focus Areas

To understand patterns across the grant proposals, the EPG team developed a taxonomy of the focus areas mentioned in proposals. The taxonomy was developed from a review of all grants coded "OE" and "diversity, equity, and inclusion," listing and aggregating all activities named in proposals, and developing categories based on what was recorded from proposals. While the taxonomy offered a tool for identifying patterns in terms of activities grantees proposed, there are some limitations to the taxonomy. First, the taxonomy was created based on a qualitative review of the current dataset of grants. Reviewing a broader dataset could result in changes to the taxonomy. Also, the taxonomy reflects activities grantees proposed, not necessarily activities that were completed during the grant period. Finally, because similar activities were grouped together for purposes of developing categories and identifying themes, some nuance is lost. For example, staff training encompasses a wide variety of activities including staff training, retreats, webinars, and more.

Categories Most Frequently Mentioned in Grant Proposals
- **Staff Training** — Building knowledge and skills to apply internally or externally
- **Philosophy/Ethos** — Defining approach, clarifying language, developing plans or frameworks
- **Assessment** — Audit, needs assessment, staff survey, environmental scan
- **Human Resources** — Improving recruitment and hiring practices to attract more diverse staff
- **Leadership Training** — Knowledge and skill building targeted specifically at board, executive, and leadership team members, as well as management training aimed at building more diverse pipelines of talent
- **Skill Sharing** — Working groups, committees, external communications for staff and/or network members to share knowledge and skills
- **Measurement** — Feedback mechanisms, internal review systems, developing metrics

The 88 proposals most frequently named the seven focus areas listed above. Specifically, the most frequently named category was "staff training" (in 63 proposals), followed by "philosophy/ethos" (50 proposals) and "assessment" (46 proposals). Most grantees proposed an average of three focus areas. Nonprofits that received more than one OE-DEI grant over successive years tended to name slightly fewer focus areas in subsequent grants, suggesting they may have gained some insights during their initial grant in structuring and sequencing the work. (See Appendix A, Figures 9-10.)

Figure 2: Proposal Focus Areas

n = 88 proposals naming multiple focus areas (2006-2018)
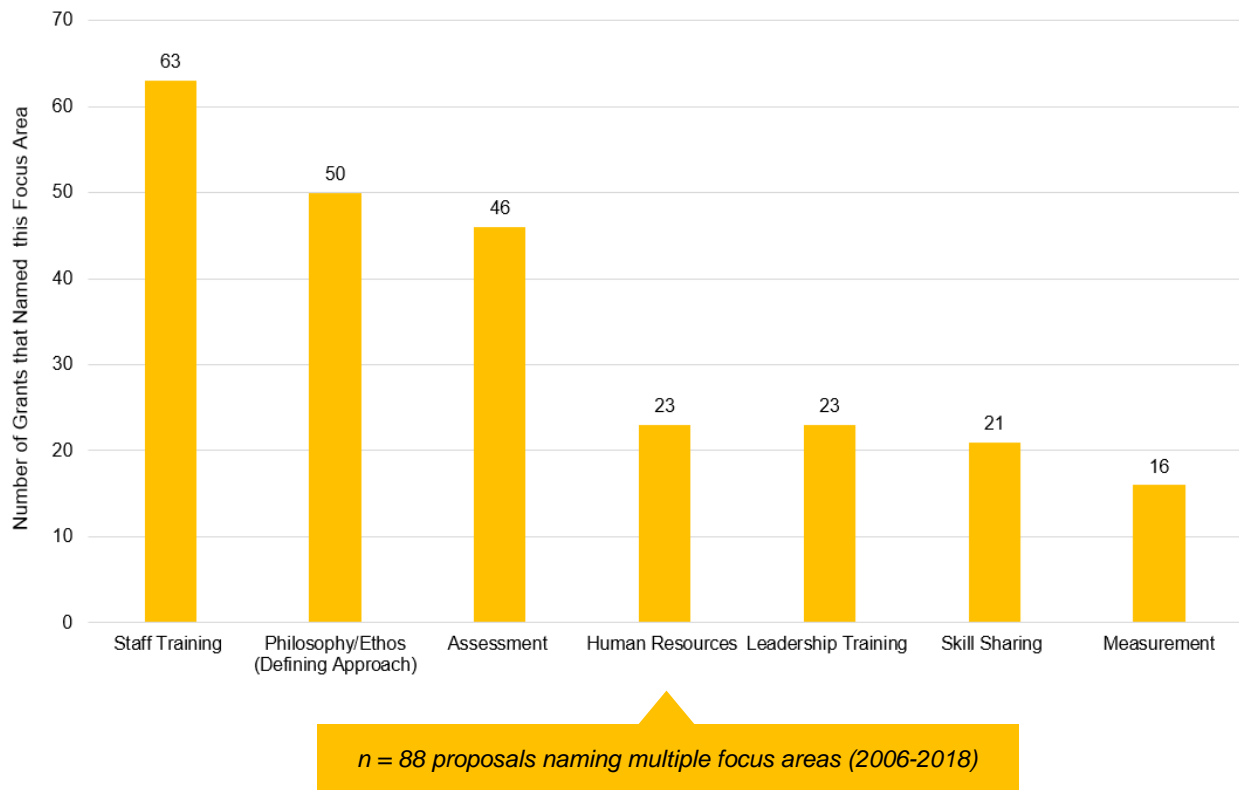
Summary of OE-DEI Grantmaking Patterns to Date

OE-DEI grantmaking has grown and evolved. While grantees are taking many different approaches to building DEI capacity, proposals most often named work around three themes: 1) training staff, 2) developing an organizational philosophy or ethos around DEI, and 3) conducting assessments related to DEI.

The data show that as grantees receive additional OE-DEI grants, or as their work becomes more advanced, their proposals are more focused, naming fewer focus areas. (See Appendix A, Figures 10-11.)

For foundation staff, understanding these patterns could provide helpful guidance for conversations with grantees. While there is no single way to advance DEI work inside an organization, understanding the approaches others are taking can help grantees think through what their own OE-DEI projects could look like.

GRANTEES' APPROACHES TO OE-DEI WORK AND SELF-REPORTED OUTCOMES

To understand the foundation's OE-DEI grantmaking from a qualitative perspective, we reviewed 41 grant reports from 31 organizations and conducted 10 interviews. The goal was to gain a deeper understanding of how grantees used foundation funding, their experiences building DEI capacity in their organizations, and perspectives from consultants and Hewlett Foundation program staff.

In grant reports, most grantees answered the following questions:

> *What did you accomplish with this OE grant? What were your objectives and to what extent were they met? What are your expectations regarding the long-term impacts of your project?*

All but two grantees reported that they met their stated objectives, though in some cases the approaches grantees ended up taking to reach those objectives were different from what they initially expected, and some grantees noted the work took longer than anticipated. Grantees self-reported on the outcomes of these grants, and our team categorized their reflections to look for patterns and commonalities across grantees' approaches.

Identifying Patterns by DEI Developmental Stage

There are many tools available for organizations to assess their DEI competency.[3] For the purposes of this assessment, Community Wealth Partners grouped proposals from the 31 organizations that submitted final reports into three DEI developmental stages based on the work they described in the proposal. This categorization did not include any self-assessment from grantees (which is part of other tools) and was intended to help identify any patterns in the outcomes that grantees achieved relative to the type of work they proposed.

A common starting point for organizations doing DEI work is to develop a shared understanding of what DEI means and how it connects to the organization and gain clarity on what this work will look like for the organization. Many organizations also begin by taking steps to improve diversity among the board or staff. When organizations described this type of work in their proposals, we categorized the proposals as **early stage**.

We considered **mid-stage** proposals to be those that showed the organization had clarity on how DEI connects to the organization's mission and strategy and were seeking funding to support activities that helped the organization move toward its vision for becoming a more diverse, equitable, and/or inclusive organization.

Finally, we considered **later-stage** proposals to be those where organizations had already taken some steps to move the organization toward its vision for becoming more diverse, equitable, and/or inclusive, and, because this work is ongoing, were seeking support to take further steps.

DEI Stages Defined

Early (n=11) — Gaining understanding of DEI, seeking clarity on how to connect DEI to the organization's mission or strategy, identifying priorities for steps to build internal DEI capacity, and/or focusing on improving diversity among board and/or staff

Mid (n=18) — Has a clear vision of how DEI connects to the organization's mission and strategy, has identified internal needs and priorities, and is seeking to develop skills, practices, policies, or procedures to help the organization move toward its vision for DEI

Later (n=2) — Has made progress building skills, practices, policies, or procedures to help the organization move toward its vision for DEI and is seeking to make further progress by expanding work into new areas of the organization and/or supporting ongoing learning and development

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[3] For example, The Intercultural Development Continuum (www.idiinventory.com) is one tool that is widely used, and the Hewlett Foundation's performing arts program uses the Continuum on Becoming an Anti-Biased, Multicultural Institution (© by Crossroads Ministry: Adapted from original concept by Baily Jackson and Rita Hardiman, and further developed by Andrea Avazian and Ronice Branding. Adapted for the Americans for the Arts "Engaging Bias" session by Tatiana Hernandez, Charlie Jensen and Kirstin Wiegmann).
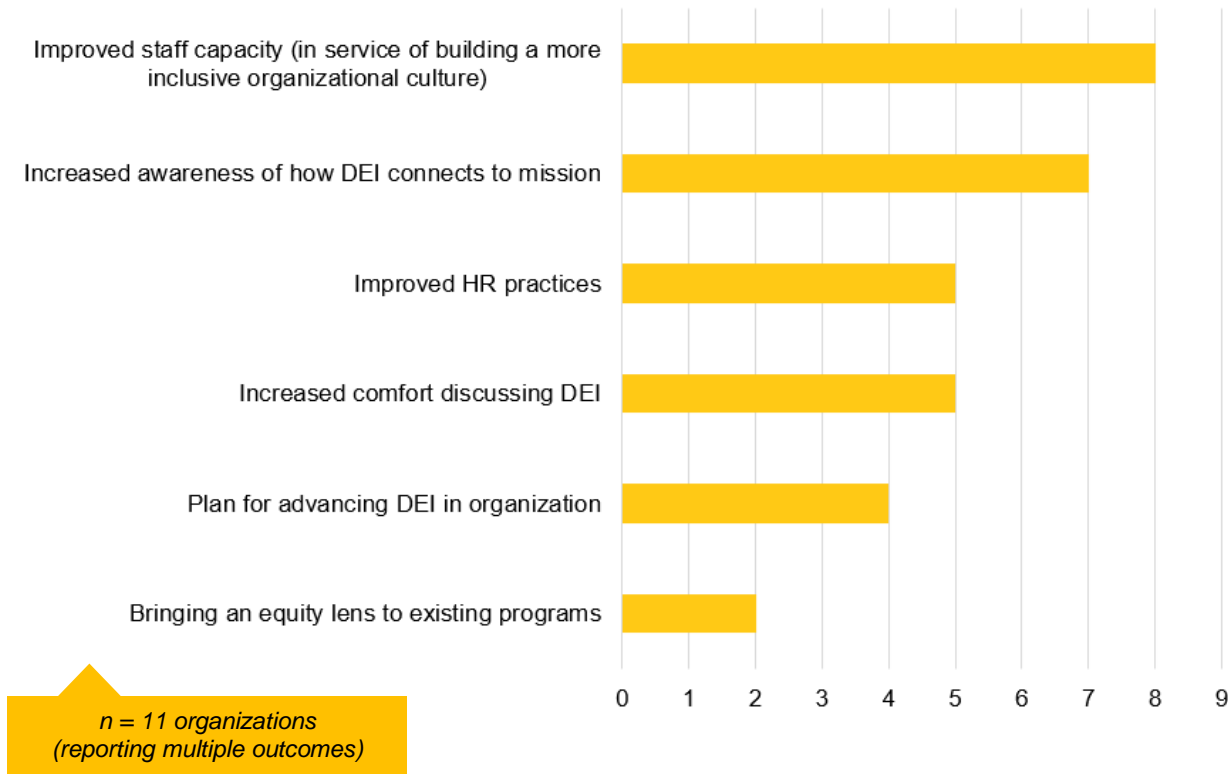
Self-Reported Outcomes for Early-Stage Projects

When looking at proposals grouped by developmental stage, some common outcomes emerged. For early-stage projects, many grantees reported **improvements in staff capacity that would help build a more inclusive culture in the organization**. Examples of staff capacity building in these reports include building knowledge and understanding of systemic racism and how it manifests in communities and organizations, management training focused on approaches that can create more inclusive workplaces, and building new skills – such as constructive listening – that contribute to a more inclusive culture.

Other common outcomes grantees reported were an increased awareness of how DEI connects to the organization's mission, improved HR practices to help attract and retain a more diverse staff, increased comfort discussing difficult topics connected to DEI, and a plan for advancing DEI within the organization. For example, the Internationals Network for Public Schools reported they are "still at an early point with honest dialogue that encourages our staff to reflect, listen to each other, and learn from one another's experiences. We are on an intentional journey to assess and broaden our own understanding of how our organization can champion diversity, equity, and inclusion as values for our mission and work."

In addition, two grantees in two early-stage projects reported they had plans for bringing an equity lens to existing programs, though this outcome was more common among mid-stage proposals.

Figure 3: Self-Reported Outcomes for Early-Stage Projects

*n = 11 organizations
(reporting multiple outcomes)*

Self-Reported Outcomes for Mid- and Later-Stage Projects

Relative to early-stage projects, mid- and later-stage projects reported more outcomes connected to organizations' programs and services. Although **improved staff capacity** was also the most commonly reported area among this group, the types of capacity investments for mid- and later-stage projects were more often in service of bringing greater equity to programs and services. Examples of the types of staff capacity improvements reported in mid- and later-stage projects include a "train the trainer" offering to build staff capacity to educate network members about racial equity as well as skill building to equip staff to more effectively engage with community members. Staff at the National Campaign to Prevent Teen and Unplanned Pregnancy received training on targeted universalism to gain "a deeper understanding of […] how it applies to their work and their responsibility in using the targeted universalism framework to ensure that all target audiences are being reached with relevant and resonant information necessary to choose if, when, and under what circumstances to become pregnant."

Other outcomes frequently reported by mid- and later-stage projects were a stronger and more inclusive organizational culture, a shared vision or shared capacities to advance DEI work across a network, an equity lens applied to existing programs, improved HR practices for hiring and retaining more diverse staff, new programs or strategies focused on disparities in communities served, and improved board diversity. Some mid- and later-stage proposals also named collecting and disaggregating data, clarity on definitions, and improved leadership capacity.

These patterns among early-, mid-, and later-stage projects are consistent with what many in the field consider to be a common progression for DEI work. (See Appendix B, Figures 12-14, for example frameworks.)

Figure 4: Self-Reported Outcomes for Mid- and Later-Stage Projects
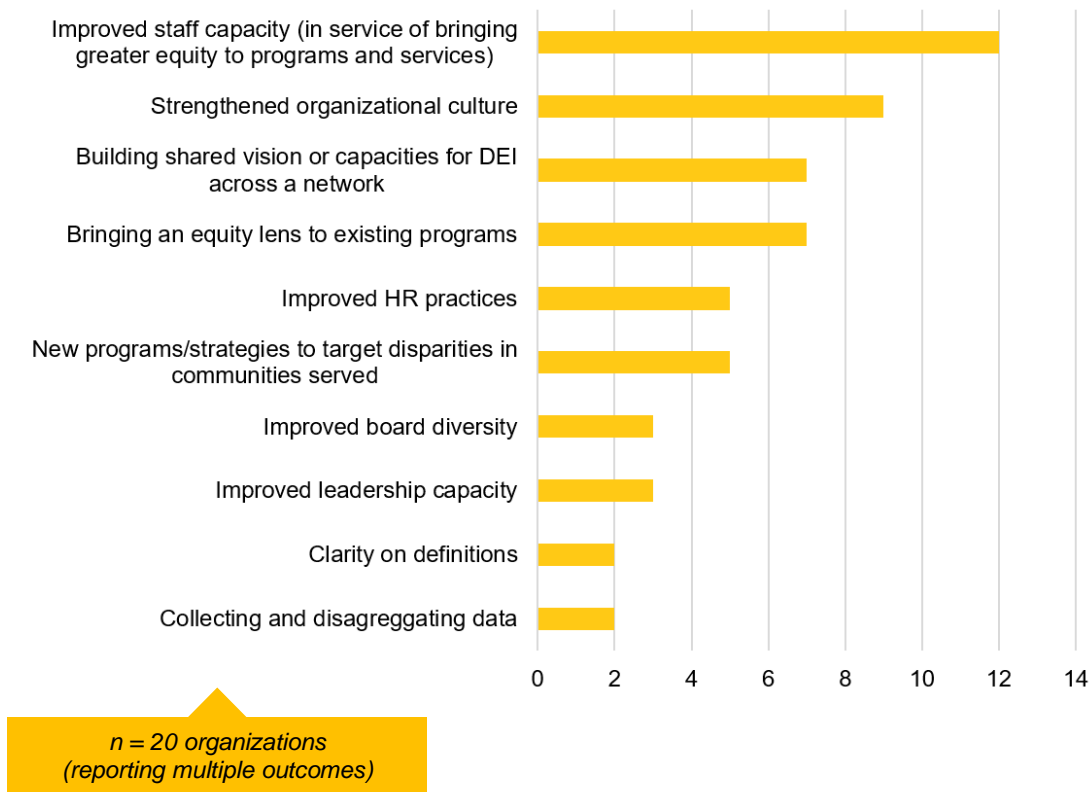
n = 20 organizations (reporting multiple outcomes)

CONSIDERATIONS FOR ORGANIZATIONS WORKING TO BUILD DEI CAPACITY

Through interviews and a review of grant reports, we sought to find practical guidance that could help inform other organizations working to build DEI capacity. Grant reports and interviews with grantees, program officers, and consultants surfaced common insights:

- Anticipate complexity and difficulty.
- Be clear on how DEI connects to mission and vision.
- Balance the systemic with personal.
- Ensure leadership buy-in *and* shared ownership.
- Board and staff will likely progress at different paces.
- Partner with consultants that can bring guidance, language, and frameworks.
- Focus on depth over breadth.
- Pay attention to privilege and power within your organization.

Anticipate complexity and difficulty.

Work to build DEI capacity in organizations is complex and takes time. In grant reports, many grantees shared a common experience of feeling like they were moving backward before moving forward. In some cases, staff began the work perceiving they (as individuals and as organizations) were further along in understanding DEI than they actually were. Other grantees noted that they had underestimated the depth and commitment this work would require.

From her experience as a social justice activist working with arts organizations, Carmen Morgan, founder and executive director of artEquity, says this is a common pattern. "They don't yet know what it entails to do this work with rigor," she said. "I'd go further to say, if they actually knew what was at stake, some of them wouldn't take it on. I don't think they know it will require that they be a different organization than the one they are now."

Be clear on how DEI connects to mission and vision.

Interviewees shared that organizations must not treat DEI as a project or initiative – organizations must be clear on how equity connects to their mission, and it must be embedded in all aspects of the work. "Organizations must have clarity on how equity is connected to their mission and then communicate to team members that it's part of their everyday practices," said Wordna Meskheniten, senior director of equity, diversity, and inclusion and special advisor to the president at The Wilderness Society. "To the extent there are shared lines of effective communication across the organization, that helps build shared language and helps the organization think about mindset shifts. That business case will help organizations be ready to take the work deeper."

Rodney Thomas, senior associate at the National Equity Project, agrees. "When people speak about diversity, equity, and inclusion, the organizations that don't do it well speak about it separately from

> **"When people speak about diversity, equity, and inclusion, the organizations that don't do it well speak about it separately from the organization's mission and vision."**
>
> — Rodney Thomas, National Equity Project

the organization's mission and vision," Thomas said. "[DEI] has to be immersed. Leadership has to believe they're doing this because there's a strong case for it. It has to be embedded in the mission and vision. Leadership has to believe it and model it through the way they make decisions in the organization, how they engage with people at different levels in the organization, and other internal structures."

Balance the systemic with personal.

Because advancing equity requires work at multiple levels (personal, interpersonal, organizational, and structural), grantees reported they found it helpful to work on multiple levels simultaneously in order to get to productive change. For example, in a grant report, Business Innovation Factory shared that staff set parameters to help ensure conversations did not stay theoretical and abstract: "One of

the first parameters we set before each conversation is to keep our comments 'personal, local, and immediate.' That is a challenge when dealing with large structural issues that seem much bigger than all of us as individuals."

"Make sure these conversations don't reside solely in the professional development category," said Carmen Morgan of artEquity. "Make sure these conversations are not theoretical and not just about doing work but that folks experience these conversations through the personal, visceral way that they should be experienced. It's a false container to open the door, walk into the workplace, and have these conversations in a contrived environment as if these issues of race and gender and class and sexual identity and the ways people are dehumanized aren't at the heart of their lives day in and day out. It has to be personal."

Ensure leadership buy-in *and* shared ownership.
Grant reports and interviews spoke to the importance of both leadership buy-in and bottom-up approaches to engage staff, create safe spaces for honest feedback, and build shared ownership in the work.

"If the executive team is not bought in, efforts will crash," said Wordna Meskheniten of The Wilderness Society. "There has to be a commitment to infusing equity throughout the work and mission of the organization. When we think about equity and inclusion, a lot has to be unlearned in order to learn. If you don't have leadership and team members committed to learning and unlearning, this work doesn't exist."

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Kevin Crouch, program fellow in education at the Hewlett Foundation, says he asks grantees about buy-in from both leadership and staff when discussing OE-DEI grants. "Is the CEO actively involved in the work? And have they talked to staff about this or is it purely top down?" he said. "Readiness and commitment require leadership to do their own thinking and reflection, but they also need to be able to distribute leadership among others to keep the momentum going."

Building shared ownership will help ensure the work endures beyond the foundation funding or consultant engagement. "[Sometimes] when the consultant leaves, the work fizzles," said Rodney Thomas of National Equity Project. "It's important to ensure the organization has structures and processes in place to ensure the work lives. Normally organizations don't have a department for DEI or someone playing a dedicated role for DEI, but that can be a structure to help make sure the work gets done. When people are serving on a committee on top of all the work they do in their individual roles, you have to be careful to ensure the work lives. Someone has to own it and be accountable to it." Thomas recommends embedding ownership for DEI into individual work plans and establishing processes and structures to check in on progress regularly.

Board and staff will likely progress at different paces.
Some grantees reported that they learned the board and staff were at different places in terms of readiness to advance equity in their organizations. This may stem, in part, from the fact that staff are coming together in the organization every day and have more time and a deeper perspective on the work.

Staff at California Shakespeare Theater shared that for the board, which meets six times per year, learning and development happened at a slower pace than it did for staff. "The work is about building trust and relationships so that new folks coming in don't get hurt," said Andrew Page, director of grants strategy and evaluations. "That takes a lot of time."

In its grant report, Silicon Valley Bicycle Coalition shared the experience of an initial conversation about racial equity with their board: "That first meeting was rough. Many people got defensive… Fast forward to today, and it's a completely different story. The board recognizes the connection between equity and bikes. They recognize that the world is not the same for everyone and that they may have some privileges that hinder their ability to bring a full understanding of the issues and therefore solutions as a board member."

Partner with consultants that can bring guidance, language, and frameworks.
Many grant reports noted the value of working with external consultants in this work. Consultants can be a friendly critic and helpful guide, providing safe space for staff to raise difficult issues and helping deepen self-awareness. In grant reports, grantees widely appreciated consultants who brought in existing tools and frameworks to guide the work.

"It was smart for the Hewlett Foundation to encourage us to get an external partner to support us in this work," said Camille Farrington, senior research associate at the University of Chicago Consortium on School Research. "Had we tried on our own to engage in this work, it wouldn't have gone anywhere. Having an external partner was critical."

Melyssa Watson, executive director of The Wilderness Society, shared a similar reflection of her organization's work with consultant Angela Park. "She gave us shared language and learning on key topics like group identities, ensured we had clear definitions of equity, diversity, and inclusion, and helped us establish our mission-driven case for our equity work," she said. "This was foundational."

Multiple grant reports also named the importance of finding the right fit in a consultant. DEI work will push the organization into uncomfortable territory, and grantees found it was helpful to partner with a consultant who worked well with the organization's culture, style, and ways of working.

Finally, in grant reports, a few grantees cautioned against an overreliance on consultants to tell you what to do. While a consultant can lay out a process for making decisions, this is the organization's work to define and own. (For more guidance on hiring equity consultants, see advice from Equity in the Center's blog.[4])

Focus on depth over breadth.
When organizations gain understanding of the ways in which they'll need to change to advance equity, there can be a desire to work on multiple areas at once. Grant reports and interviewees expressed the "go slow to go fast" sentiment when it comes to approaching equity work inside organizations.

"There's a tension between wanting to move fast and do a lot of things – because you realize the gap between where you are and where you want to be is huge – and the fact that it's slow, deep, internal work," said Camille Farrington of the University of Chicago Consortium on School Research. "As soon as you start to engage on one issue, it brings up lots of other things."

> **"I think if we had focused on one to two artifacts as the object of a collaborative, equity-driven revision process (rather than a larger number of things to revise with an equity lens), we might have accomplished more."**
>
> — New Technology Network

In a grant report, staff from New Technology Network reflected, "I think if we had focused on one to two artifacts as the object of a collaborative, equity-driven revision process (rather than a larger number of things to revise with an equity lens), we might have accomplished more."

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[4] Equity in the Center, a project of ProInspire, published a two-part blog on hiring equity consultants: "So You Want to Hire an Equity Consultant" and "So You Want to Hire an Equity Consultant - Part 2."

At the same time, heeding the "go slow to go fast" advice can raise concerns about sluggish progress or lack of accountability for advancing change inside organizations. To mitigate this, grantees in grant reports said they found it helpful to have small, early wins to align the team and build momentum, to set benchmarks with clear timeframes to hold the organization accountable, and to prioritize transparency and frequent communication so that the staff has a shared understanding of what progress is being made.

Pay attention to privilege and power within your organization.
Interviewees acknowledged that often internal equity work begins by placing added burden on people who hold identities that are marginalized, such as people of color, LGTBQ+ people, or people of different abilities. "If you're not a person with privilege, in a group of privileged people, it's easier for them to turn to you and ask all the questions," said Derik Cowan, associate director of marketing at California Shakespeare Theater. "If you [are a person without privilege and] want to be part of making the change, you're going to want to do it for a little bit, and then you may get frustrated by it. The few folks we had who carried extra weight in the early days – as much as our organization has improved [from their contributions] – many of them aren't here anymore."

"The best remedy for that," said Carmen Morgan of artEquity, "is a fierce antiracist white person in the organization. Folks who are part of the dominant culture need to model antiracist practices, model gender inclusive practices, interrupt, and reframe what the norm is. They have the most power to do that. To the extent that they can lean in and take on more of that work, expect emotional labor to be decreased on the part of colleagues."

> **"Folks who are part of the dominant culture need to model antiracist practices, model gender inclusive practices, interrupt, and reframe what the norm is."**
>
> — Carmen Morgan, artEquity

Some grantees in grant reports found identity-based caucusing – spaces for people of similar identities to talk and work together – to be a helpful practice as well. This way white people or people of other identities with privilege can learn from one another without placing added burden on people of color or other marginalized identities. Caucuses for people of color or other marginalized identities can offer a source of support and a space to share and make meaning of experiences that have happened. (See Racial Equity Tools for more resources on caucusing.[5])

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[5] The Racial Equity Tools website – created through a partnership between Center for Assessment and Policy Development, MP Associates, and World Trust Educational Services – includes a section of resources on "Caucus and Affinity Groups."

CONSIDERATIONS FOR FUNDERS

In interviews, we asked, "What advice do you have for the Hewlett Foundation and other foundations who want to support DEI capacity among grantees?" In response, grantees, program officers, and consultants offered recommendations:

- Meet grantees where they are and offer flexibility.
- Provide space for grantees to learn from one another.
- Do the internal work, and adopt more equitable practices in response.

Meet grantees where they are and offer flexibility.
The grants analysis and literature review pointed to a common arc many organizations follow in their equity journeys (see Appendix B, Figures 12-14). Nonetheless, there are a variety of ways an organization could structure and sequence this work, and the rate of progress an organization might expect to make in a given timeframe will depend on a number of factors including resources, staff capacity, and organizational culture. Interviewees advocated that foundations avoid being prescriptive with grantees about what the work should look like – a value consistent with how the Hewlett Foundation approaches the rest of its grantmaking. Instead, interviewees encouraged foundations to seek to understand where they are in the work and be flexible about how the work will emerge. As Andrea Keller Helsel, program officer for environment at Hewlett, recommends, "[it's about] having an open mind, knowing we're providing the resources for them to do the work, and not being prescriptive about that. We're here to listen to what they need. How can we help?"

> "**[It's about] having an open mind, knowing we're providing the resources for them to do the work, and not being prescriptive about that. We're here to listen to what they need. How can we help?"**
>
> — Andrea Keller Helsel, Hewlett Foundation

Ways that the education program strives to meet grantees where they are and offer flexibility, according to Kevin Crouch, include asking grantees to identify their short- and long-term outcomes, rather than defining them for them; allowing flexibility in grant budgets if the work ends up taking a different course than what grantees anticipated and paying for staff salaries and overhead; and making OE-DEI funding available regardless of the developmental stage of the work.

Provide space for grantees to learn from one another.
Interviewees valued cohort experiences to learn from other organizations going through similar changes. "Having spaces like that are so important to allow us to sit and focus on how we can be an inclusive and equitable organization," said Wordna Meskheniten of The Wilderness Society. The Wilderness Society is participating in a cohort of climate and conservation grantees that Hewlett is bringing together to explore issues of equity, inclusion, and diversity.

"There is a lot of work [grantees] can do together and learn from each other that I underestimated when we first started doing these grants," Andrea Keller Helsel of Hewlett said. "While each of these organizations needs to get their own houses in order, there is safety in numbers and learning from each other that is really powerful." (See the next page for more insight on designing cohorts.)

In addition to physical spaces for connection, grantees also cited the importance of learning from one another through connecting with each other and reading about each other's experiences. "I don't always know when funders create case studies and share best practices – maybe these studies are not publicized enough, or maybe I'm just too busy?" said Eric Ting, artistic director of California Shakespeare Theater. "Every one of us, no matter where we are in this ongoing journey, wants to know who we can look to as role models. Funders can go a long way in identifying those role models in such a way that we can benefit from their best practices, from their mistakes."

Do the internal work, and adopt more equitable practices in response.
Foundations that want to support grantees' efforts to improve DEI capacity must do their own internal work as well. Interviewees from both inside and outside the foundation said they would like to see more learning and reflection happening across the foundation, more sharing of the learning that is taking place, and a demonstration of that learning through the foundation's actions. Program staff expressed a desire for more foundation-wide learning and discussion as well as definitions for DEI – either for each program area or for the foundation.

In addition to doing learning and internal reflection, interviewees said foundations should adjust practices to be more aligned with the equitable culture the foundation seeks to create. "In many ways, foundation funding and support dictate how we approach the work, communicate about the work, and measure the work," said Wordna Meskheniten of The Wilderness Society. "It's extremely important that foundations are also doing equity work and that there's consideration for the fact that this is evolutionary. How foundations ask us to measure outcomes, how they ask us to communicate about what we're doing – those structures need to be reconsidered. The deeper we get into the work, the more expansive this is. It's important the foundation is evolving with us so we can have the conversations we need to have and be authentic in how we communicate about the work so it's not just reporting certain metrics at certain times."

> **"I don't think this work should be some new initiative. It should be part and parcel of the work we do."**
>
> — Kevin Crouch, Hewlett Foundation

"I don't think this work should be some new initiative," said Kevin Crouch about Hewlett's OE-DEI grants. "It should be part and parcel of the work we do."

Crouch said he is trying to adjust his practices and expectations in conversations with grantees receiving OE-DEI funding. "I've had to think about outcomes differently and the kinds of outcomes I'm comfortable with," he said. "This work requires us be to be ok with not having specific measurable outcomes like we have for other grants and be able to defend why that's the case."

18

Other examples of actions that might result from a foundation's internal equity work include making more grants to groups that have historically not received funding from a foundation and expanding the foundation's network to be more diverse. This year the performing arts program changed its practices by using a participatory grantmaking process for its OE-DEI grants. (See below for more information on this process.)

Participatory Grantmaking

In 2019, the Hewlett Foundation's performing arts program tested out participatory grantmaking, a process in which they shifted decision-making power to an advisory council, a majority of whom were individuals from outside the foundation. "We felt a dissonance between implementing an equity-focused program in an inequitable manner, in the way we've historically done where the program officer decides who gets grants," said Jessica Mele, program officer for performing arts. The program invited all current grantees to apply for an OE-DEI grant and assembled an advisory council made up of five grantees whose work centers equity, three external equity experts, and two program officers (Mele and Jaime Cortez). The advisory council members as a group decided who would receive funding.

Mele and Cortez recognized how important it would be to compensate the advisory council members, many of whom had experienced philanthropy engaging in problematic and offensive behavior. However, the nature and level of that compensation changed during the project, based on feedback from the advisory council. Mele advises other programs interested in participatory grantmaking to figure out compensation in advance and be transparent with recipients about the thinking behind setting compensation. From a values perspective, she advises programs to be generous. "Be mindful of the history there and negotiate that history," Mele said. "In designing this process, we were dealing with the consequences of past injustices and missteps perpetrated by our foundation and others over time."

The council worked with the performing arts program to align around a set of criteria they would use to select grant recipients. The program first offered an optional workshop for all grantees to deepen their knowledge about equity in the performing arts and support them in applying that knowledge to their own organizations. Then, after applications were in, the council met to determine who would receive the grants.

Throughout the process Mele and Cortez put guardrails around what the foundation could and couldn't fund and reminded the council of those guardrails every time they met. That clarity and transparency was key. "Be transparent when you can, and when you can't, be transparent about why you can't be transparent," Mele said. "We weren't always as transparent as we could have been, and the advisory council kindly reminded us to err on the side of more information, not less."

Mele found it helpful to have the effective philanthropy group's program fellow Jasmine Sudarkasa join sessions with the advisory council. "She's a person of color who carries her values around equity and social justice very clearly, and for that person to also hold the values of the foundation was really helpful," Mele said.

While the experience was logistically challenging and emotionally exhausting, Mele and Cortez are happy with the process and hope to go through a participatory grantmaking process again in the future.

You can learn more about participatory grantmaking in various resources including GrantCraft's guide "Deciding Together: Shifting Power and Resources Through Participatory Grantmaking" and the Heinz Foundation's "Transformative Arts Process Strategic Plan 2016-2019."

VIGNETTES

California Shakespeare Theater

Started as an artistic collective in 1974, the California Shakespeare Theater (Cal Shakes) produces theater from the Shakespeare canon and beyond. Today, Cal Shakes has an annual $5 million budget and employs 30 full-time staff, 12 part-time staff, approximately 150 seasonal staff, and 50-75 contracted artists. For more than six years, Cal Shakes has been on an intentional journey in understanding and living out equity, diversity, and inclusion. While the depth and nuance of that journey can't be captured in a few pages, this case study shares insight into it with the goal of providing foundations and nonprofits an example of what this work can look like inside an organization. Readers may find learning from others' experiences can be helpful, but staff at Cal Shakes cautioned against thinking that any other organization's path would be like theirs, and Carmen Morgan (who supported their journey as a consultant) pointed out that "the spectrum of what the work looks like is as diverse as the organizations themselves."

This case study is based on interviews in June, July, and August 2019 with Cal Shakes staff members Eric Ting, artistic director; Tirzah Tyler, interim managing director; Derik Cowan, associate director of marketing; and Andrew Page, director of grants strategy and evaluations. Cal Shakes would like to be transparent about the fact that three of the four people interviewed are white (one of whom is gender non-conforming). This is primarily because these three individuals are among the few who were part of the initiative from the start and are still on staff. Before the interviews, these individuals shared the interview questions with and got input from the organization's equity, diversity, and inclusion workgroup. However, this case study is missing the voices of former Cal Shakes staff members who contributed greatly to shifting the organizational culture but are no longer at the organization. Three in particular Cal Shakes would like to acknowledge are original EDI workgroup members Sonya Renee Taylor (author, poet, and founder of The Body is Not an Apology movement); Joyce Fleming (former Cal Shakes director of human resources); and Lisa Evans (former artistic engagement associate, performing artist, and facilitator). Carmen Morgan, founder and executive director of artEquity, was also interviewed. Additional interviewees from the Hewlett Foundation's performing arts program were Jessica Mele, program officer, and Emiko Ono, director. Since these interviews were conducted, Sarah Williams joined Cal Shakes as one of the few managing directors of color working in the regional theater, serving in a leadership role alongside Ting. Together that brings the 10-member leadership team to six persons of color, with two of the white leadership team members identifying as gender non-conforming. While this case study looks back at the organization's journey and where it was when the case study was written, Cal Shakes continues to evolve and move forward.

The Spark

Cal Shakes was formed in 1974 as a collective performing Shakespeare in the park for free. Over time, their programming retained a strong Eurocentricity, even as the Bay Area became majority people of color. In 2012, Cal Shakes' 38th season, the theater staged a play written by a playwright of color for the first time. "SPUNK" – written by George C. Wolfe, directed by Patricia McGregor, and with music by Chic Street Man – was a huge box office success. But more consequential was the realization it sparked: the Cal Shakes team realized that their programming by and large no longer represented the communities surrounding them. At the same time as this realization dawned on them, many theaters across the nation that historically catered to white, middle-, and upper-income audiences and donors were struggling with fluctuating revenue from subscription ticket sales and shifting audience demands. Though the reasons for these changes are likely multifaceted, in 2013, Cal Shakes staff members saw a connection between the changes and shifts in the country's demographics: as the percentage of people of color in the US increased, communities were looking for theater that was more relevant to and better representative of them. This knowledge only added to Cal Shakes' growing conviction that the organization needed to evolve.

It was within this context that Cal Shakes artistic director Jon Moscone met Carmen Morgan, who at the time was a diversity, inclusion, and organizational development consultant and director at Leadership Development in Interethnic Relationship. (Morgan later founded artEquity, a training and consulting organization focused on creating and sustaining a culture of equity and inclusion through the arts and culture.) Their conversations helped Moscone and other staff members recognize that for the organization to stay relevant and sustain its work, it needed to better reflect the Bay Area communities in which it worked. Cal Shakes needed greater racial and ethnic diversity among its staff.

Moscone reached out to the Hewlett Foundation to ask about a possible $35,000 grant to develop a strategy to increase diversity across Cal Shakes, leading the foundation to make its first organizational effectiveness grant explicitly focused on equity, diversity, and inclusion. Cal Shakes' relationship with the Hewlett Foundation stretched back to 1983, when the nonprofit received its first grant. By the time Cal Shakes requested this funding, they'd had 30 years of multi-year general operating support funding, which had helped build a level of trust to allow Cal Shakes to make this type of request. Also in 2013, Cal Shakes was selected for the New California Arts Fund, a cohort of the James Irvine Foundation that granted Cal Shakes $2 million over a six-year period, in addition to trainings, cohort convenings, technical assistance in planning, and other support, all with the broader goal of strengthening Cal Shakes' community engagement. The momentum and funding were building. "They had someone [Carmen Morgan] who they'd met at this conference and fallen in love with," said Emiko Ono, Hewlett's director of the performing arts program who was the program officer working most closely with Cal Shakes at the time. "There was agreement across [Cal Shakes'] staff and board at that time. They knew they needed something to change. It was the right booster shot at the right time."

With the Hewlett grant, Cal Shakes hired Morgan to interview and survey staff and board members to understand team diversity and experiences within the organization; develop and carry out a learning curriculum; and create policies, practices, and structures to institutionalize the work.

"At the time, there was a sense [among the Cal Shakes team] that we'd need to make changes that were more cosmetic," said Derik Cowan, associate director of marketing at Cal Shakes. "We thought we had a bunch of good, liberal white people who knew what they were doing. We thought this was going to be an easy process."

"I've never worked with an organization where this hasn't happened," Morgan said. "[Early-stage organizations] don't yet know what it entails to do this work with rigor. The 'we don't know what we don't know' is huge."

The Journey Begins
In the first year, staff members spent much of their time "gathering the courage to act" or helping others gather their courage, said Andrew Page, Cal Shakes director of grants strategy and evaluations. Team members were worried about doing the wrong thing or making mistakes, so they spent time planning and discussing changes. "How much you can expect in a year?" asked Tirzah Tyler, interim managing director at Cal Shakes. "Zero! Negative! First you hit the resistance that pulls you back, and then you start to build."

> **"How much you can expect in a year? Zero! Negative! First you hit the resistance that pulls you back, and then you start to build."**
>
> — Tirzah Tyler, Cal Shakes

"One of the struggles of that first year was that white supremacy culture tells us we should be able to do all these things," Cowan said. "'Action, action, action, make things happen.' That's not what that early work is about, but it's our first instinct." As Cal Shakes team members began to notice and

challenge white supremacy cultural values[6] like productivity and efficiency, they increasingly saw the value of sharing, connecting, and learning together without accomplishing specific measurable goals.

"One thing I ended up doing on many occasions was saying, 'This isn't a race. Let's slow down. Do less. Go deep," Morgan said.

Much of the early days were focused on increasing awareness and "strengthening muscles to do the heavy lifting required for culture change," as Morgan puts it. "One of the things we try to do together is make sure these conversations don't reside solely in the professional development category," she said. "We make sure these conversations are not theoretical and not just about doing work, but that folks experience these conversations through the personal, visceral way that they should be experienced. It's a false container to open the door, walk into a workplace, and have these conversations in a contrived environment as if these issues of race and gender and class and sexual identity and the ways people are dehumanized aren't at the heart of their lives day in and day out. It has to be personal."

In that first year, Cal Shakes worked to build muscles to have personal, visceral conversations. "We are learning to ask the right questions and not turn away from the answers we get," Cal Shakes shared in a narrative report for the 2013 grant.

In these conversations, team members with more marginalized identities were more often asked to educate their colleagues. "There was definitely an extra load put on people without the same privilege," Cowan said. "If you're not a person with privilege in group of privileged people, it's easier for them to turn to you and ask you all the questions." Cal Shakes team members have made progress in learning from other sources like EDI trainings, books, and online resources. But they are still grappling with how to identify their own learning gaps rather than put the burden on colleagues to raise issues.

As staff and board members engaged in these learning experiences, Morgan and the team collaborated to set up structures to keep the work moving forward. Cal Shakes adapted their business office position into a director of human resources role that was staffed by a person of color. That role was instrumental in revamping the organization's hiring practices. The scope of work with Morgan expanded beyond increasing diversity of staff and board to include increasing diversity of community partners, program participants, artists, contractors, and audience. The work also expanded beyond increasing diversity to shifting the organization toward a more inclusive organizational culture and more equitable practices.

One key driver of that shift was the equity, diversity, and inclusion workgroup, which was formed and tasked with nurturing an inclusive organizational culture. The workgroup was initially limited in power: it could make recommendations but not decisions. It took a couple of years before the group was able to ease resistance and make change within the organization. The group played a key role in developing a statement about Cal Shakes' values of equity, diversity, and inclusion and creating ownership of that vision across the organization. "Getting people to commit to their own work and to own that organizationally … that was a long process," Page said. "It was years before we got to anything remotely like that."

> **Cal Shakes Statement on Equity, Diversity, and Inclusion**
>
> "At Cal Shakes, we believe that equity is a practice. Our actions – both onstage and off – can have a positive social impact by exposing oppression, addressing historic injustices, and showing how power can be transformed and shared in different ways. We endeavor to dismantle systemic bias by actively including, reflecting, and creating opportunities for our diverse Bay Area communities. We recognize that this work is ongoing and often imperfect, but we are committed to facilitating respect for the many facets of the human experience."

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[6] Read more about white supremacy culture on the Dismantling Racism website and Tema Okun's writing on the topic.

The workgroup also modeled behaviors that have since become the norm throughout the organization: It included people across programs, levels of seniority, and responsibility, and it functioned on a consensus decision-making model. Today, Cal Shakes strives to share decision-making power throughout the organization.[7] As part of the effort to shift decision-making norms in the organization, Cal Shakes re-envisioned its senior team, which at the time did not include the right combination of voices, according to staff members. The organization now has a leadership team that includes three additional positions for people who may not have seniority but bring underrepresented voices.

Another key driver of change at Cal Shakes was the appointment of Eric Ting, who took the helm as artistic director in 2015, drawn in large part by the organization's equity, diversity, and inclusion work. "The recognition that this work was happening at a historically white organization – and to a degree of nuance that I'd not encountered anywhere else in my professional career – that was an essential factor in my coming out here," Ting said.

While Cal Shakes' values were impacting their programs in schools and with community partners, they were not having as much of an impact on the theater's most public programs. "The things our community partners are wrestling with, we should be wrestling with on our stage as well," Ting said. At the time, Cal Shakes' works on the stage – with few exceptions – were very much in the tradition of colonialist Eurocentrism. Ting saw the need to disrupt the very notion of what is considered "classic" in order to remain relevant to a 21st-century audience. Along with a concerted effort toward a radically inclusive artistic company, this initial impulse was formalized as the New Classics Initiative, which pursues two primary objectives: to reimagine classic works of Western drama through the lens of diverse cultural and gender perspectives; and to introduce new classics from non-Western sources, either through adaptation or invention, that challenge whose stories we tell and how we tell them in both form and content. This initiative includes multi-year projects that are defined and shaped by community voices and stories (the first of these will premiere in 2020), as well as robust programming to hold space for people to respond to the work in the community and at the theater.

> **"Theater exists to reflect the world back on us, so that we can reflect upon our place in the world."**
>
> — Eric Ting, Cal Shakes

These productions are helping audiences engage with the universal themes of Shakespeare's work in ways that are more relevant to Cal Shakes' surrounding communities, according to Ting. "There are two kinds of theater: there's the kind of theater you go to in order to escape the world, and there's the kind of theater you go to in order to invite the world in. We're the latter," Ting said. "Theater exists to reflect the world back on us, so that we can reflect upon our place in the world."

Cal Shakes also began engaging with community partners in new ways, developing long-term relationships with local direct service and advocacy organizations. While Cal Shakes has since made great strides to align mainstage programming with issues meaningful to their partners, these relationships are intentionally held independently of artistic curation. Ting offers: "We dive more deeply into the role art can play in community work as a tool for forging more enduring connections and lifting up marginalized stories. If anything, we seek to be influenced by our partners in how we serve as an arts institution." Among developed best practices are compensation for participation, providing food at community events it hosts around performances and civic dialogues, and bringing art to communities through such means as resource sharing and community residencies.

Working with the Board
While the board supported the work from the beginning, they progressed at a slower speed than the staff. They meet six times a year, leading to fewer opportunities to learn together. "The work is about building trust and relationships," Page said. "That takes a lot of time."

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[7] Read more about Cal Shakes' efforts to distribute leadership in the Hewlett Foundation's "What distributed leadership looks like."

"It's not uncommon for board culture to be the last practical foothold," Morgan said. "I've seen that as a pattern. It's usually staff driving these conversations and doing this work. The board sometimes comes along of its own volition and sometimes kicking and screaming."

Cal Shakes' work on equity, diversity, and inclusion led to a change in the makeup of the board. As the organization's values shifted, some board members no longer felt alignment with Cal Shakes and left their roles. "We've definitely lost some board members who were big donors," Tyler said. "[But] if you look at the hours you spent trying to hang onto the donors and patrons who were going to leave anyway and put that time into cultivating new board members and audiences, it makes me wonder. If you could lift that burden off the organization, it could move more quickly." As Cal Shakes lives more deeply into its values, people with similar values are joining the board. "As we've recruited new board members, what has attracted them are the changes we're making both on- and off-stage," Ting said.

In 2019, Cal Shakes applied for and received a second Hewlett Foundation organizational effectiveness grant focused on equity, diversity, and inclusion, this one for $50,000. The full team worked together to determine how they wanted to spend the funds. One of the organization's key goals for that grant will be to support board members' journeys in equity, diversity, and inclusion – a request that came directly from one of the board members.

The Journey Continues
Cal Shakes team members today emphasize that the organization's culture changed only because the people changed. Some individuals learned and shifted their mindsets and behaviors while others left the organization.

As Cal Shakes continues to change, it is encountering new tensions. For one, Cal Shakes' audience is still majority white, wealthy, and privileged. "We haven't figured out how to easily communicate the culture change with our audiences," Tyler said. As Cal Shakes has begun hiring more people of color, people of various genders, and other underrepresented individuals, some audience members "treat them as second-class citizens, misgender them, etc.," Tyler said. These frontline staff members – specifically staff of color and Queer and Trans staff – are subjected to microaggressions and do a disproportionate amount of the emotional labor of culture change. "We're just starting to grasp this," Tyler said. "It's a system-wide, field-wide issue that Cal Shakes is just beginning to address."

"That's a perfect example of why this can't just be about a nine-to-five job," Morgan said. "We can see that it touches everything – vendors, guests, artists, patrons, the entire ecosystem… Until we have an antiracist society, what's the meantime solution? The best remedy for that is a fierce antiracist white person in that organization. Those white colleagues need to double down on their ability to interrupt."

Cal Shakes is beginning to shift its focus to supporting staff of color and Queer and Trans staff members across the organization. "Thanks to the current Hewlett grant, it is the first time we will be able to provide funds for restorative practices for folks who are most impacted by this culture change," Tyler said. When applying for the 2019 Hewlett Foundation grant, the equity, diversity, and inclusion workgroup talked through ideas for what the organization might propose. Cal Shakes aligned around a new priority: support for healing and restorative practices for individuals most impacted by these changes due to their identities.

Today, Cal Shakes is focused on how much they have yet to learn and grow. They've made strides, including increased staff diversity of race, ethnicity, and gender, but "it's more than that. It's the points of questioning and the willingness to be honest about what's going on," Cowan said. "We're at a point now where when we talk about this work, we talk about the failures as

> "It's more than [increasing diversity]. It's the points of questioning and the willingness to be honest about what's going on."
>
> — Derik Cowan, Cal Shakes

much as the successes, because we need to be honest. This is not easy."

Cal Shakes is finding ways to support smaller theaters that cultivated local artists of color but historically haven't received much foundation funding. "As we're doing more culturally specific work, how can we recognize the efforts and investments that small theaters of color have put into these artists who are now performing on our stage?" Ting asked. "How can we direct our resources in such a way that recognizes the work of these extraordinary institutions that have held space for their communities for so long that so many of our historically white organizations now benefit from? What are the gestures, even if they're small gestures, that we can make? The hope is that they accumulate into something transformative, even if it's one step at a time."

The reverberations of Cal Shakes' work "have hit nationally," Tyler said. With Morgan's guidance, in 2014, Tyler helped co-create the diversity and inclusion committee for the Production Manager's Forum (a network of about 500 production managers all over the U.S.). With the help of the other committee members, they established regular monthly conference calls, occasional webinars, and in-person EDI discussions at the biannual meetings.

The work has changed the fabric of Cal Shakes. "For us, equity, diversity, and inclusion are more integrated into our organization and are often included in grants," Tyler said. "It's a messy environment to be in. It's not clean cut, not utopian. It's a bunch of people saying what they really think. Sometimes they piss each other off, but they have the tools to work through that. That environment feels unique to me in a way I wouldn't have described in 2013 as an end goal."

"I used to joke that organizations like ours are giant ships: hard to turn," Ting said. "What I'm realizing is it's not the destination but the act of turning that is the gift of the work. The act of turning – the self-reflection, the mistakes you make, those rare glorious successes – that's everything."

University of Chicago Consortium on School Research

Since 1990, the University of Chicago Consortium on School Research (UChicago Consortium) has partnered with Chicago Public Schools to conduct research to inform schools' policies and practices. The UChicago Consortium today operates on an annual $4 million budget and employs 28 full-time staff – a small part of the greater University of Chicago system. The consortium has been on a journey to understand and live out diversity, equity, and inclusion – a journey that became more intentional with two Hewlett Foundation grants, in 2016 and 2017. While the depth and nuance of that journey can't be captured in a few pages, and though each organization's journey is different, this case study shares insight into UChicago Consortium's experience with the goal of providing foundations and nonprofits an example of what this work can look like inside an organization.

This case study is based on interviews that took place between June and August of 2019 with Camille Farrington, senior research associate with the UChicago Consortium; Rodney Thomas, senior associate with the National Equity Project; and Kevin Crouch, program fellow in education with the Hewlett Foundation.

The Spark

University of Chicago Consortium on School Research (UChicago Consortium) had long maintained a strong relationship with Chicago Public Schools (CPS) as it conducted research to inform the schools' policies and practices. The Consortium also had a steering committee of community members from across Chicago. Yet over time, the team came to acknowledge that they were not sufficiently connected to the people who should be the primary beneficiaries of their research. "We started to think, what would it mean to connect more directly with families and students?" said Camille Farrington, senior research associate with the UChicago Consortium. "How would that shape the research questions we ask, how we conduct studies, and who we hold ourselves accountable to?"

Around the same time, the Hewlett Foundation education program reached out about potential funding for an organizational effectiveness grant focused on diversity, equity, and inclusion. The UChicago Consortium received a $50,000 grant in 2016 to engage a consultant, the National Equity Project, in three activities: 1) conducting a scan of the team's practices and opportunities engaging parent and community groups; 2) developing and testing structures for improving that engagement; and 3) training the team on reaching out, bringing in, listening to, and utilizing the expertise and concerns of families and communities.

The Journey Begins

As the Consortium began grappling with questions about community engagement, staff members raised issues of a lack of racial diversity on the staff and in leadership. The staff was mostly made up of white women, and the staff members of color were mostly in junior positions. Staff members also questioned the Consortium's capacity to gain community members' trust and meaningfully engage with them. There was a long history that led community members to distrust the university, which represented whiteness and wealth and was situated in the largely African American neighborhoods on Chicago's south side.

"You realize the gap between where you are and where you want to be is huge," Farrington said. "In the first year, we had to say, 'we're not in a position to go out and launch community partnership work without doing serious internal organizational work."

"[The Consortium researchers] do research on and think deeply about equity and school reform for students who are the most marginalized," said Kevin Crouch, program fellow for education at the Hewlett Foundation. Yet despite the team's focus on achieving equity for students, the Consortium had progress to make on embedding equity into the way they work,

> **"In the first year, we had to say, 'we're not in a position to go out and launch community partnership work without doing serious internal organizational work.'"**
>
> — Camille Farrington, UChicago Consortium

ensuring inclusion for everyone on their team, and better reflecting the racial and ethnic makeup of the neighborhoods they research. "[Equity] isn't something new to them, but you can hold that [value] and still have work to do," Crouch said.

The National Equity Project worked with the Consortium to build strong structures and processes to support the diversity, equity, and inclusion work and ensure it got carried out. One of those structures was an equity committee. In addition to driving forward the work, the committee navigated conversations with the Consortium's leadership to build buy-in and clarify what fell under their purview and power.

"You can't come in and do the work and not have the work be championed by influential people in the organization," said Rodney Thomas, senior associate with the National Equity Project. "What I've seen in the past is great work that gets off the ground but doesn't go anywhere because the work is not carried by leadership. The Consortium leadership made the difference in the success of this project."

Engaging Communities and Changing Processes
When the UChicago Consortium received a $50,000 renewal grant in 2017, they used the funds for three purposes: 1) to change their process for conducting research to better address the needs and experiences of the most underserved families and communities; 2) to ensure their research was directly helpful, and provided, to families and communities; and 3) to build staff capacity to engage families and engage across lines of difference in race, class, language, and role.

The Consortium took a series of steps in their process of engaging communities. First, a subgroup of the equity committee went on a listening tour, sitting in on community and parent meetings. Then they began building relationships with a few organizations, including a charter school in their neighborhood and a community organizing group. Through those relationships, they volunteered in a community clean-up day and supported student and family focus groups and other events led by the organizations. "We tried to show up and do the work with them that they were engaged in," Farrington said. "We're still grappling with what form those relationships take, what we have to offer that's of value to those community organizations, and how that gets filtered back into the work we do." The Consortium is still on its journey toward deep partnership with families and communities.

"To immerse themselves in those communities is radical for them," Thomas said. "It's not something researchers typically do."

Building these community partnerships has pushed the team's thinking and even the ways some of them view their own role. "We've come to understand there's no substitute for letting people speak for themselves," Farrington said. "I feel my job is more about creating structures and opportunities for people's voices to have some power behind it and providing opportunity for them to have influence."

> **"I feel my job is more about creating structures and opportunities for people's voices to have some power behind it and providing opportunity for them to have influence."**
>
> — Camille Farrington, UChicago Consortium

The team shifted their hiring process to seek out greater racial diversity and added interview questions about equity and diversity. Today, the Consortium has more team members of color.

The Consortium also developed a set of racial equity questions to go alongside their existing research protocols – questions like, who will be impacted by this research? and, whose perspective is needed to inform the research design? Researchers must answer these questions when they first propose a research project, which is designed to compel them to connect with communities to get their input into the research questions and design.

The Journey Continues
The Consortium is continuing to work toward the three goals included in their 2017 grant proposal. Equity will be the center of their annual staff retreat in September 2019. During that retreat, staff members will discuss what it means to conduct research from a racial equity lens, share thoughts on a draft Consortium equity statement, and learn about the liberatory design methodology (which is design thinking that promotes equity) to apply to their work with Chicago students and families.

As UChicago Consortium team members dig deeper into the work, they're uncovering more that needs to be done; and as they set expectations among staff about the work they will do, staff are holding each other accountable for making progress. Yet though the team is ambitious in what it hopes to accomplish, the work takes time.

"There's a tension between wanting to move fast and do a lot of things, and yet it's slow, deep, internal work," Farrington said.

"This is complex, highly charged work," Crouch said.

Farrington cites two things as critical to keeping the work going, particularly among other competing demands: foundation funds and the National Equity Project, which serves as a source of support and accountability.

The Wilderness Society

Since 1935, The Wilderness Society has led the effort to permanently protect 109 million acres of wilderness in 44 states. Today, the organization is at the forefront of nearly every major public lands victory and is leading work to make public lands part of the climate solution and ensure these lands are managed in an inclusive manner so that people from all backgrounds can equitably share in their benefits. The organization has an annual $35 million budget and employs 145 full-time, part-time, and volunteer staff all working toward its mission to protect wilderness and inspire Americans to care for our wild places. The Wilderness Society is on a continuing journey to understand and embrace diversity, equity, and inclusion in all aspects of its work – a journey that became more focused and intentional with two Hewlett Foundation grants, in 2016 and 2018. While the depth and nuance of that journey can't be captured in a few pages, and though each organization's journey is different, this case study shares insight into The Wilderness Society's experience with the goal of providing foundations and nonprofits an example of what this work can look like inside an organization.

This case study is based on interviews in June and July 2019 with Wilderness Society staff Wordna Meskheniten, senior director of equity, diversity, and inclusion and special advisor to the president; Kitty Thomas, vice president for external affairs; Melyssa Watson, executive director; and Chase Huntley, interim deputy vice president of the energy and climate program. Additional interviewees from the Hewlett Foundation's environment program were Andrea Keller Helsel, program officer, and Cristina Kinney, program associate.

The Spark

Before The Wilderness Society received its first diversity, equity, and inclusion (DEI) grant in 2016, staff members say the organization had made moderately successful efforts to bring greater intentionality into its DEI journey. What helped those efforts take hold and gain momentum was a $40,000 grant. When a program officer at the Hewlett Foundation told staff members the funds were available, they decided to request funding. "There's a lot to be said for even a relatively small grant coming from one of the largest institutional investors that focuses attention not just for staff but also the leadership and board," said Chase Huntley, interim deputy vice president of The Wilderness Society's energy and climate program. ""It gave weight to the commitment we'd made internally and put it at a different level of attention by putting Hewlett's name behind it."

Though the grant didn't cover the full $140,000 cost of the project they proposed, it served as a catalyst to unlock additional resources. The goals for that first grant were to conduct an assessment, develop a learning curriculum, and create a plan to increase staff diversity.

According to Wordna Meskheniten – who joined the organization as senior director of equity, diversity, and inclusion and special advisor to the president in 2018 – the organization met three conditions for readiness to embark on this work: 1) there was a commitment from leadership; 2) there was a culture of learning – and unlearning; and 3) there was a clear connection to the organization's mission.

Reflecting on the organization's readiness to dive into this work, Kitty Thomas, vice president for external affairs, said, "[At the time,] we knew we needed to do this work, but I don't think we considered [our] readiness." She continued, "We learned as we went. We were as ready as we could have been."

There are many ways The Wilderness Society's mission is inextricably linked to equity, diversity, and inclusion. For one, the organization's founders included some of the same leaders involved in the early years of the National Park Service – a system created in 1916 for which many Indigenous peoples and non-Indigenous rural families were forcibly removed from their lands. "While [The Wilderness Society is] talking about the beauty of these

> **"Why this work had such staying power is that it is rooted in the organization's strategy and mission and embedded in the work we do."**
>
> — Chase Huntley, The Wilderness Society

spaces, they're also reconciling history," said Andrea Keller Helsel, program officer in the Hewlett Foundation's environment program.

Through this work, The Wilderness Society has begun to confront the complex history of public lands, including the fact that many people feel unsafe or unwelcome on them and that they are lands forcibly taken from Indigenous peoples. That understanding has helped them approach their work in a new way.

"Many of us assumed everyone had the ability to enjoy these places and were welcome to them," Thomas said. "People here are now thinking: If that's our mission, [to protect the wilderness and inspire people to care for wild places,] how are we achieving it and how are we falling short? How can we make sure these places are truly shared by everyone?"

"Why this work had such staying power is that it is rooted in the organization's strategy and mission and embedded in the work we do," Huntley said.

The Journey Begins
The Wilderness Society engaged Angela Park, an independent consultant, writer, and founder/executive director of Mission Critical, who brought a deep knowledge of equity, diversity, and inclusion as well as conservation. When some staff members referred to the work as an "initiative," Park encouraged them to think of it as "forever work." "It's complex and takes a long time to do this well," Thomas said.

> "[As Angela Park says, this work is] 'forever work.' It's complex and takes a long time to do this well."
>
> — Kitty Thomas, The Wilderness Society

In 2016, Park worked with the team to develop a mission-driven case for equity, diversity, and inclusion. She also conducted an all-staff survey that assessed what equity, diversity, and inclusion means at The Wilderness Society, what work and types of diversity the organization should prioritize, and what learning needed to happen internally. It also measured the sense of belonging staff felt in their teams, offices, and organization-wide. It set a baseline for The Wilderness Society to measure its progress against in the coming years and helped the organization create a learning curriculum for staff and develop a new recruitment and hiring policy.

"[Angela] gave us shared language and learning on key topics like dominant and subordinate group identities and definitions of what we mean when we say diversity, equity, and inclusion," said Melyssa Watson, executive director of The Wilderness Society. The Wilderness Society also worked with another consultant – The Management Center – to embed equity in their management trainings.

While the organization saw big changes that first year – staff members point to the recruitment and hiring policy as one of the most important changes – they confirmed their suspicion that the work takes time. "This is culture-shifting work," Meskheniten said. "You can't look at it at the end and say, 'Yeah, we did that. Check.'"

"Our metabolism for cultural change internally is gradually improving – we've been sitting on the couch and now we're going outside to exercise, but we're not running marathons yet," Huntley said.

In 2018, The Wilderness Society hired its first full-time staff member to focus exclusively on equity, diversity, and inclusion – Wordna Meskheniten. It was clear to the organization's executive team that to do this work well, they needed someone to lead these efforts from within, a team member who had direct experience interacting with other team members and being immersed in the organization's culture. They decided that a senior leader in the organization with deep expertise in equity would be the ideal role. This position was intentionally designed as a senior director who directly advises the

president and the executive team and is part of the internal senior leadership team in order to truly effect change.

Then in 2019, the organization received a second grant – this one $75,000 – from the Hewlett Foundation to build their cultural competency in partnering with Native American groups. The organization plans to use the funds to support a training curriculum for their team, facilitate immersive trips to deepen relationships, build a community of practice among staff members, and assess how to live out their commitment to partnering with Indigenous governments, communities, and organizations.

"While not everything in that original proposal is likely to pull through in the first year of this effort, we were willing to ask questions that we didn't know the answers to and [for which we] might not be totally comfortable with what we heard back," Huntley said.

The further the organization goes on their journey, the more staff learn about what the work entails. "Once you pull one thread, there's so much more underneath it," Watson said.

"The more staff learned, the hungrier people were to do more," Thomas said, "but they needed a lot of touchpoints to engage in this work successfully, which is hard to do without additional capacity."

Meskheniten now provides that additional capacity. As she drives the work forward, she also emphasizes the importance of all team members' ownership of the work. "It's hard not to just see [equity work] as work over there," she said. "It's a process of unlearning. 'Let's have an update on [equity]' makes it feel like it's on the margins." Team members are taking ownership of equity efforts and integrating it into their day-to-day work. "I'm not often in a room where there's the expectation that I'm the equity person that will bring [equity] up," Meskheniten said. "Eight times out of 10, a colleague is the one bringing it up."

The Journey Continues

In 2019, the Hewlett Foundation is offering new learning opportunities for The Wilderness Society and other grantees. The foundation is partnering with Native American leaders to host a workshop on cultural and social protocols and legal guidelines for working with sovereign governments. It's also creating a cohort of climate and conservation grantees to share and learn from each other in DEI. "Spaces like that are so important," Meskheniten said.

Beyond providing learning opportunities, The Wilderness Society is also looking to foundations to deepen their own equity, diversity, and inclusion journeys.

"It's extremely important that foundations are also doing equity work," Meskheniten said. "The deeper we get into the work, the more expansive it is. It's important that the foundation is evolving with us so we can have the conversations we need to have and be authentic in how we communicate about the work."

> "The deeper we get into the work, the more expansive it is. It's important that the foundation is evolving with us so we can have the conversations we need to have and be authentic in how we communicate about work."
>
> — Wordna Meskheniten, The Wilderness Society

As the organization shifts toward being more diverse, inclusive, and equitable, it has power to shift the conservation field, too. "The Wilderness Society is one of oldest, largest, most influential groups. When the leader changes how they do business, everyone takes notice," said Keller Helsel. "Having them model what thoughtful conservation looks like is a way of addressing and inviting change across the movement."

Going forward, The Wilderness Society is trying to balance the ongoing commitment to this "forever work" with annual funding cycles. "These are one-year grants, but organizations, cultures, and systems change slowly," Huntley said.

CONCLUSION

Foundation staff refer to OE grants as "booster shots", and they think of OE-DEI grants this way as well. These grants are intended to help grantees build momentum on advancing DEI inside their organizations. Foundation staff wanted to know if these grants are having the desired effect. In short, the early answer seems to be yes.

In grant reports and interviews, grantees expressed appreciation for OE-DEI funding because it helped validate the work, created space for organizations to focus on it, and provided external accountability and guidance for making progress. Because this work is complex and ongoing, grantees also appreciated the flexibility the grants often allowed and opportunities for renewal funding while also noting that the work typically takes far longer than a one-year grant. Grantees appreciated acknowledgement from program officers that this work is developmental and non-linear, and that it may be difficult to demonstrate clear outcomes right away.

Every organization's approach to structuring and sequencing the work will be unique, and grantees appreciated that the foundation does not take a prescriptive approach when providing OE-DEI funding. At the same time, grantees appreciated when the foundation connected them with resources and other organizations from which they could learn. Grantees who participated in cohorts the foundation hosted appreciated those opportunities.

When grantees shared the stories of their organization's experiences advancing DEI, they all emphasized that their work couldn't be attributed to one grant. Recognizing the complexity of this work, it could be helpful in a future assessment to explore the broader landscape of ways nonprofits make ongoing investments in DEI capacity.

Grantees, consultants, and program staff also named the importance of advancing equity inside the foundation in order to be an authentic partner with grantees. Among foundation staff, we heard a desire for more foundation-wide learning and discussion. Our sense is that there is not a shared understanding of everything happening to advance DEI knowledge and practice across the foundation, especially as there are always new staff entering the foundation, and staff are eager to share with and learn from one another. In addition, grantee interviews suggest there could be value in more proactively sharing the foundation's DEI journey externally.

In future years, there will be more to learn as the foundation continues its investment in OE-DEI grantmaking and program areas make more grants internationally. As the foundation looks ahead to future investments in OE-DEI grantmaking, staff might consider the following questions:
- What existing practices stand out as helpful ways to support our grantees in DEI capacity building?
- How can we better support our grantees in DEI capacity building? How might that support shift in settings outside the U.S.?
- How can we better support our program staff in making OE-DEI grants? How can we balance our decentralized approach with providing guidance and tools?
- What additional data might we need to help us continue learning from our OE-DEI grants?

Appendix A: Supplemental Figures

Figure 5: DEI Grants by Program Area

Special Initiatives, (9 grants) $558,000, 6%

Philanthropy, (2 grants) $180,600, 2%

Performing Arts, (42 grants) $1,854,000, 19%

Education, (79 grants) $3,991,500, 42%

GD&P, (25 grants) $1,203,000, 13%

Environment, (29 grants) $1,676,500, 18%
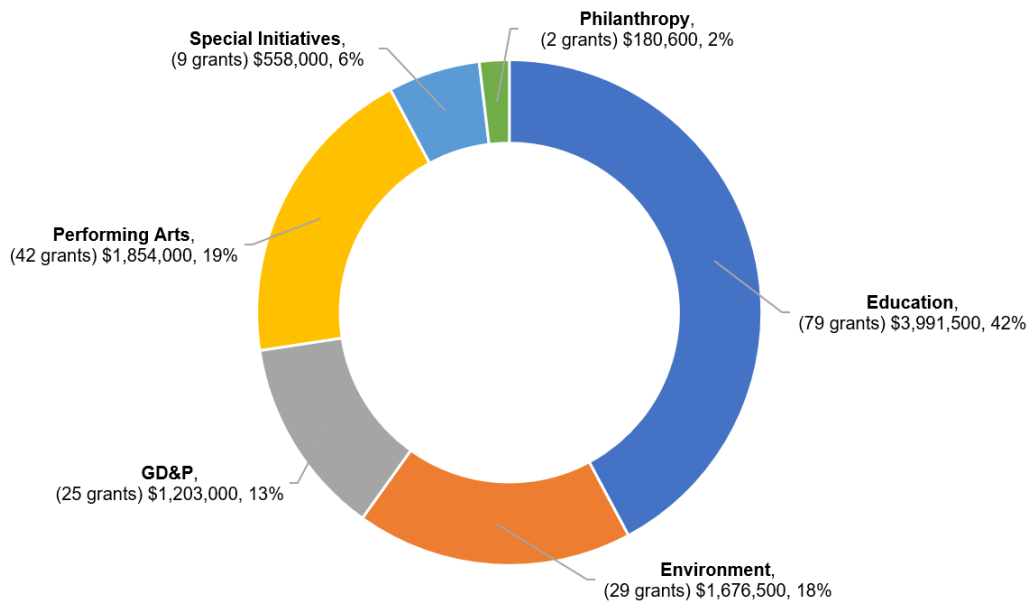
n = 186 grants totaling $9.5 million, including 2019 projections as of July 8, 2019

Figure 6: Maximum, Average, and Minimum Grant Size
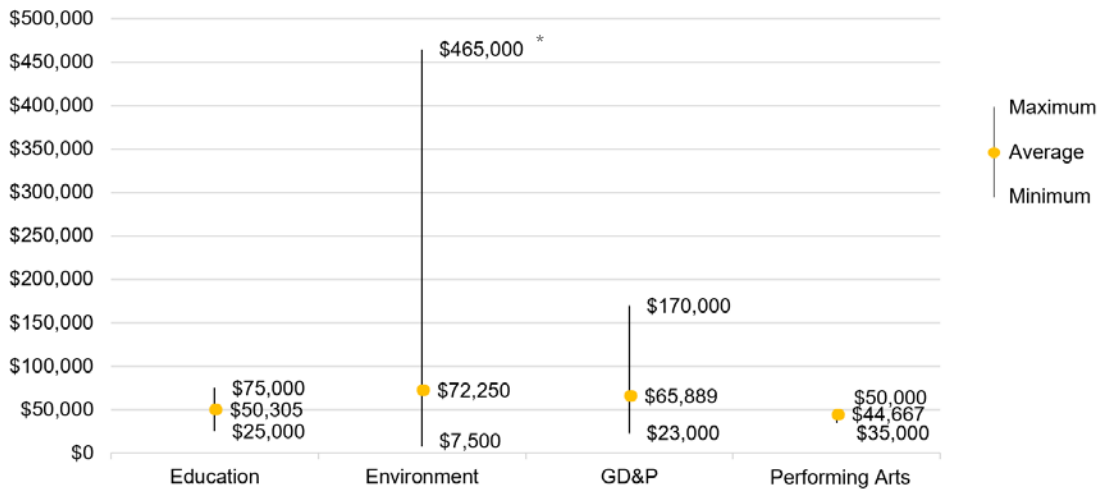
Number of Grants	**Education**	**Environment**	**GD&P**	**Performing Arts**
	59	14	9	3

Note: This excludes grants in philanthropy and special initiatives because they gave one and two grants, respectively.

*The $465,000 grant was provided to Resources Impact to coordinate a one-year cohort (2018-2019) with grantees of the environment program. The cohort will be led by five experts in diversity, equity, inclusion, and justice and consist of in-person learning opportunities, among other activities.

Figure 7: Average Percent of Project Funded, by Program
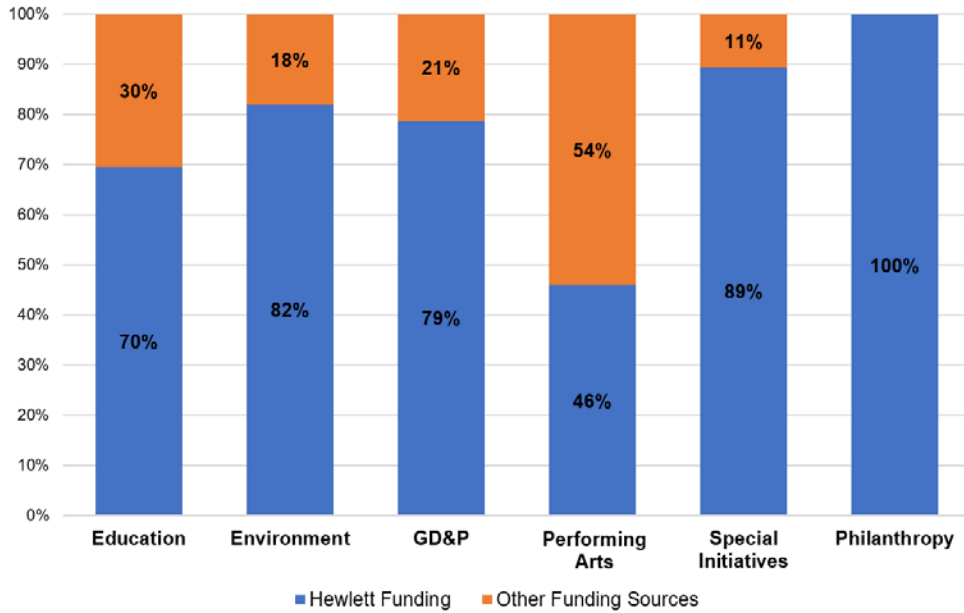
Number of Grants	Education	Environment	GD&P	Performing Arts	Special Initiatives	Philanthropy
	59	14	9	3	2	1
			n = 88 grants			

Figure 8: Percent of Hewlett Grants Covered by Program vs. OE Budget
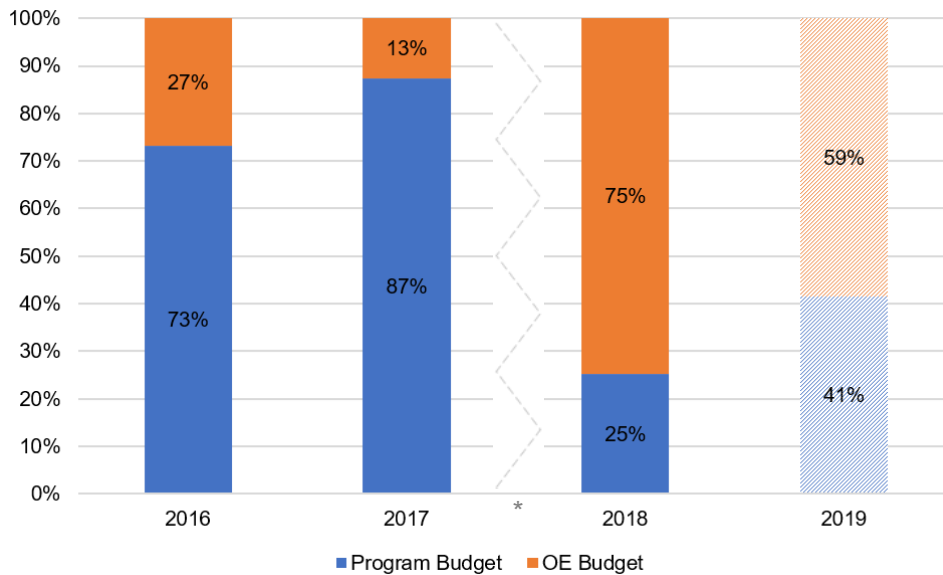
	2016	2017	2018	2019
OE Funding	$183,020	$162,000	$2,143,200	$2,673,500
Program Funding	$501,980	$1,120,000	$721,400	$1,893,000

n = 183 grants, including 2019 projections as of July 8, 2019
*EPG committed a special allocation of funding for OE-DEI grants beginning in 2018

Figure 9: Focus Areas Across Programs

	Staff Training	Philosophy/Ethos (Defining Approach)	Assessment	Human Resources	Leadership Training	Skill Sharing	Measurement
Education	43	32	27	15	12	14	11
Environment	9	9	7	3	4	4	1
GD&P	7	7	9	2	4	1	3
Performing Arts	3	1	3	1	2	0	1
Special Initiatives	1	0	0	2	0	1	0
Philanthropy	0	1	0	0	1	1	0
Total	63	50	46	23	23	21	16

n = 88 proposals naming multiple focus areas (2006-2018)

Figure 10: Focus Areas in Renewal Grants

	First Grant		Second Grant
Alliance for Excellent Education	4	↓	3
Battelle For Kids	3	↓	2
Community Growth Educational Foundation	3	↓	2
ConnectEd: The California Center for College and Career	3	▬	3
Educause	5	↓	2
EL Education	2	↑	3
Envision Education	4	▬	4
Generation Citizen	3	↑	4
Internationals Network for Public Schools	4	↓	2
Pivot Learning Partners	4	↓	3
Unbounded Learning, Inc.	3	▬	3
University of Chicago	3	↓	1
Wilderness Society	3	↑	4

n = 13 nonprofits who received grants twice

Figure 11: Number of Focus Areas by DEI Stage
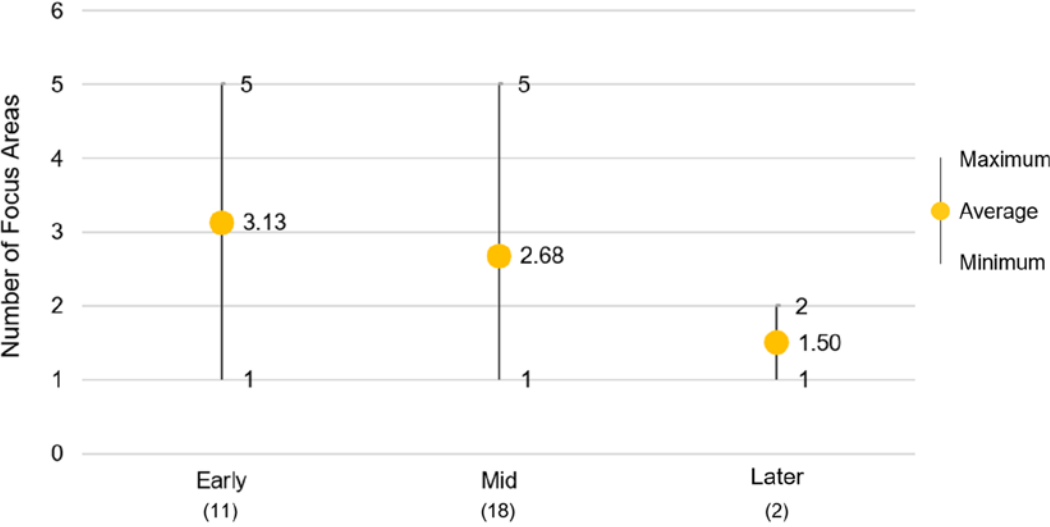
n = 41 grants to
31 organizations

Appendix B: Additional Frameworks

In the course of this assessment, several frameworks were elevated to and by our team as potentially useful to OE-DEI grantees and program officers. We are sharing them below.

Figure 12: Stages to Improve Organizational Equity, Inclusion, and Diversity[8]

In a report for the Hewlett Foundation's environment program, Hovland Consulting outlined four stages to improve organizational equity, inclusion, and diversity: 1) start a dialogue, 2) facilitate introspection, 3) institutionalize commitment, and 4) continually improve and track progress. OE-DEI grant reports across all program areas suggest most organizations are taking approaches that align with these stages.

| 1 Start a dialogue	2 Facilitate introspection	3 Institutionalize commitment	4 Continually improve and track progress
- Form an internal working group - Establish equity, inclusion, and diversity as organizational priorities (from senior leaders) - Contract an equity and inclusion expert	- Facilitate internal dialogues among board and staff - Understand baselines and challenges - Survey staff to elicit equity, inclusion, and diversity-related priorities	- Establish organizational priorities and goals based on survey and dialogues - Incorporate responsibilities into job descriptions - Embrace hiring practices that seek diverse candidates - Hire as necessary (e.g., equity manager)	- Provide ongoing formal training and educational opportunities - Measure progress against qualitative and quantitative goals set in Stage 3 - Include equity, inclusion, and diversity goals in staff development discussions

Figure 13: Seven Stages of Transformation[9]

The experience of going through organizational transformation can follow a curve depicted in "Seven Stages of Transformation." When describing what an organization might expect from DEI work, Suprotik Stotz-Ghosh – vice president for racial equity, partnerships, and talent at Grantmakers for Effective Organizations – often shares this change curve. The curve reinforces the feeling that many OE-DEI grantees expressed of moving backward before moving forward.

1. Birth
2. Plateau
3. Chaos
4. Pit
5. Death
6. Re-emergence
7. Integration

From… To…

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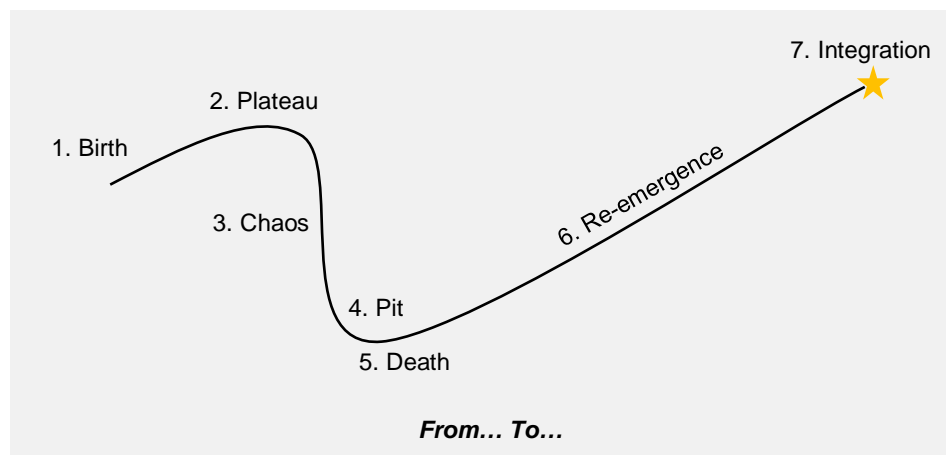
[8] This framework is from Hovland Consulting's report "Equity, Inclusion, and Diversity in the Western Conservation Program, November 2018," provided to Community Wealth Partners by the Hewlett Foundation performing arts program.
[9] Adapted by Suprotik Stotz-Ghosh from Council on Michigan Foundation's Peer Action Learning Network, Beth Zemsky, Lynn Wooten

Figure 14: Four Levels of Oppression[10]
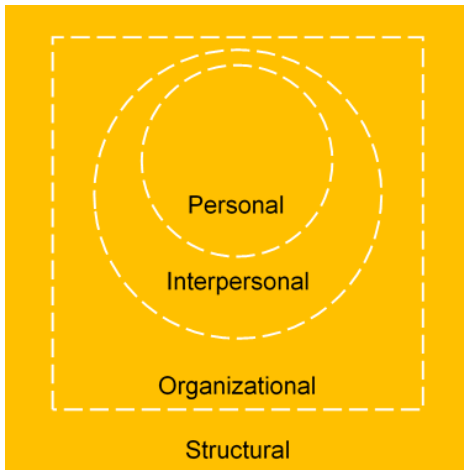
Inspired by a framework developed by the nonprofits Race Forward and the People's Institute for Survival and Beyond, the strategy consulting firm Team Dynamics adapted this framework to distinguish four levels at which oppression operates. At the individual level, *personal oppression* is private beliefs, influenced by culture, and *interpersonal oppression* is biases that occur when an individual's private beliefs affect their public interactions. At the systemic level, *organizational oppression* is unfair policies and discriminatory practices of institutions that routinely produce inequitable outcomes for certain classes of people and advantages for others, and *structural oppression* involves the cumulative and compounding effects of an array of factors that systematically privilege some people and disadvantage others. Efforts to advance equity must work on all four levels according to Race Forward and Team Dynamics. Building organizations' capacity to be more diverse, equitable, and inclusive is complex and difficult to do, particularly when we consider these four levels at which oppression exists and must be addressed.

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[10] Like many frameworks, this framework was inspired by the thinking of many groups and individuals. Team Dynamics cites three sources of influence that they used in developing this version of the framework:
   1. Race Forward's report "Moving the Conversation Forward: How the Media Covers Racism, and other Barriers to Productive Racial Discourse" (see page 4)
   2. The Interaction Institute for Social Change's adaptation of the frameworks developed by Race Forward and the People's Institute for Survival and Beyond (see page 11 of "Planning for the INTERcultural City")
   3. A graphic representation of this framework provided by nukirk in the blog post "But isn't all racism institutionalized, because it's the reinforcement of white supremacy? What defines racism from prejudice?"

Appendix C: Interviewee List

1. Andrea Keller Helsel, Program Officer in Environment, Hewlett Foundation
2. Andrew Page, Director of Grants Strategy and Evaluations, California Shakespeare Theater
3. Camille A. Farrington, Senior Research Associate, University of Chicago Consortium on School Research
4. Carmen Morgan, Founder and Executive Director, artEquity
5. Chase Huntley, Interim Deputy Vice President of the Energy and Climate Program, The Wilderness Society
6. Cristina Kinney, Program Associate in Environment, Hewlett Foundation
7. David Sasaki, Program Officer in Global Development and Population, Hewlett Foundation
8. Derik Cowan, Associate Director of Marketing, California Shakespeare Theater
9. Emiko Ono, Director of Performing Arts, Hewlett Foundation
10. Jessica Mele, Program Officer in Performing Arts, Hewlett Foundation
11. Kevin Crouch, Program Fellow in Education, Hewlett Foundation
12. Kitty Thomas, Vice President for External Affairs, The Wilderness Society
13. Melyssa Watson, Executive Director, The Wilderness Society
14. Rodney Thomas, Senior Associate, National Equity Project
15. Tirzah Tyler, Interim Managing Director, California Shakespeare Theater
16. Wordna Meskheniten, Senior Director of Equity, Diversity, and Inclusion and Special Advisor to the President, The Wilderness Society

In June and July of 2019, Community Wealth Partners spoke with six Hewlett Foundation program staff members to learn more about their experiences engaging with nonprofits around organizational effectiveness (OE) grants for diversity, equity, and inclusion (DEI). The individuals interviewed were Andrea Keller Helsel and Cristina Kinney of the environment program, Jessica Mele and Emiko Ono of the performing arts program, Kevin Crouch of the education program, and David Sasaki of the global development and population program. Below is a sampling of their answers, edited for clarity and selected to highlight insights that might be most valuable to other program officers.

How have you approached conversations about diversity, equity, and inclusion with your grantees? How have you approached conversations differently based on whether grantees are earlier or further along in their DEI journey?

- "In our space, equity isn't a new term. You can't have worked in education without having heard of it. But everyone can testify to not completely getting it or not working towards it as much as they'd like. That's how I start conversations. I talk about the Hewlett team, our mission for education and students, the values we have, how we fall short in centering our work in equity, and how that's something we want to change and do better at. **I always start with a personal story first so it's not coming from a righteous place** but shows that we're working on [equity] ourselves. 'We're in this together, we're hoping to learn and be better at it, and we want to support you to do the same.' Then people feel more comfortable sharing about their challenges." — Kevin Crouch (Education)

- "**I get curious**: What does that mean for you? What does that look like right now? Where do you hope to be? Where are you right now? What does it mean for your organization? We think it's important to do both internal and external work. I worry when an organization is only doing audience diversification work without doing internal work…. **Most groups are early on in their journey of adopting and metabolizing DEI, so these tend to be pretty soft, open-ended, nudging conversations**. But for a few grantees, it's their life work. They're dedicated and often critical and vocal about how we do our work and how other people do their work, so **we do a lot of sitting back and listening because we have a lot to learn from those groups**. For example, grantees that center equity in their work expressed that the OE-DEI grant opportunity not simply award funds to large, white-led organizations that are beginning this work, but also reward 'equity expert' organizations that have been grappling with issues of diversity, equity, and inclusion for many years." — Emiko Ono (Performing Arts) *Note: Before answering this question, Emiko qualified that she moved out of the program officer role about a year and a half ago and hasn't had a conversation with a nonprofit about DEI for a while.*

- "The number one question I get from grantees is, how do I find a consultant who does this thing? Some come with, how do I diversify our board? Those that are more developed in their equity journey tend not to come with questions like that; they might come with questions about resources or something like, 'We want to do this thing. How can we fund it?' There are some organizations that don't ask questions because they're afraid and don't want to look bad. **There's a lot of relief when we tell organizations that every organization is different and approaches this work differently**. [They appreciate hearing] that other grantees are going through similar challenges and [when I] refer them to other grantees." — Jessica Mele (Performing Arts)

- "We've been working to broaden the portfolio, and per the strategy, now partner with more Indigenous-serving and grassroots organizations. **The conversation [with Indigenous and grassroots groups] is different but no less peppered with questions about equity**. What does an equitable partnership look like with big environmental groups? What experiences do your employees have when working with a federal agency? To have candid conversations with all grantees, I try to go see them as much as possible. I'm a former grantee myself. That helps build the relationship because they know I've been on that side of the table. **People appreciate honesty and transparency**. I respond quickly and thoroughly. I try to jump on

problems. That builds trust." — Andrea Keller Helsel (Environment) *Note: Keller Helsel is focused on the western conservation portfolio. Her observations are based on experiences with that portfolio.*

- *(speaking about making OE-DEI grants outside the U.S.)* "There's a sensitivity to discussing politically fraught aspects of identity and exclusion. **It takes different shapes in different countries**. In one country, political affiliation may be highly associated with tribe, whereas in another it's more closely associated with religion, caste, or birthplace. These forms of identity and exclusion are politically sensitive enough that I haven't brought them up with grantees, and they haven't brought them up with me. In the meantime, there is consensus among grantee organizations and colleagues that there is a lot of work to be done on [less politically fraught issues like] gender, class, and disability." — David Sasaki (Global Development and Population)

Do you talk about diversity, equity, and inclusion in the same way you talk about other organizational effectiveness considerations? Is it different for nonprofits to navigate bumps – like finding the right consultant or planning for more than they can accomplish in one year – when the work is DEI-focused compared to other organizational effectiveness work?

- "There's an energy, vulnerability, and honesty that's required [in equity, diversity, and inclusion (EDI) conversations]. **It feels more like a heart-to-heart**. The tone feels like you're having this conversation over a glass of wine instead of on a call. [Also,] the OE grants often feel more like a discrete project, whereas EDI work seems never-ending and there are no clear chapter marks…. These conversations feel more intimate and vulnerable than other OE conversations." — David Sasaki (Global Development and Population)
- "One thing our program does well is discuss organizational capacity, looking at leadership, strategy, finances, etc. I have tremendous confidence in the individuals on my team and their ability to ask good questions when speaking with grantees about their equity needs or emerging equity policies and practices, but **we don't have a set way of having that conversation like we do with other OE conversations**." — Jessica Mele (Performing Arts)
- "I think one of the main distinctions here is between the type of problem you're hoping to solve and the type of solution necessary to do that. When there's an obvious or complicated problem, all you need are best practices or expert knowledge. I'd say a lot of your standard OE issues fall into this category. **But for complex problems, like equity and inclusion challenges, the answers aren't always obvious or knowable in advance. You need to probe and experiment and learn along the way.**" — Kevin Crouch (Education)

What are conditions or characteristics you look for to indicate an organization is ready for DEI work?

- *(speaking about a specific OE-DEI grant)* "We looked at the **ability of the organization to do reflection and absorb their learning into their structure** and carry that work forward." — Emiko Ono (Performing Arts)
- "We haven't completely figured out what readiness looks like or should look like. It's not like we're experts on it, so for us to be overly dogmatic about what readiness looks like would be disingenuous. **One thing we're looking for is how honest and candid the proposal is**. Are people comfortable saying where their gaps and challenges are? Not 'we've done all this great work' but 'here's a gap between our aspiration and practice, here's what's standing in the way, and here's what we hope to learn.' That shows organizational self-awareness. Sometimes they might misunderstand their organization's situation, but that doesn't diminish how much thought or work they've put into [thinking about] it…. [I'm also thinking about,] are they contributing in-

kind funds or other grants? For some organizations, this is new for them, so they may not have other funds, but we still look for in-kind funds. Are you putting a healthy amount of staff time toward this?" — Kevin Crouch (Education)

How do you talk with grantees about how to structure or sequence the work?

- "We've found that **every organization is different**, so we don't want them to assume they'll make great progress with *x* and then move to *y* activities." — Cristina Kinney (Environment)
- "A lot of times, I'll talk with organizations before they submit a proposal, and they want to change some specific structure in their organization or have anti-bias training – specific, technical stuff. I often encourage them to pause and talk about what this means, what they're hoping to accomplish, what it means to them personally. **[It's important to] take time and have permission to do the learning and make sense of things versus just make change.** I've had this conversation more times than I can count. Grantees often say, 'that makes sense and I've actually been thinking about that too.' So why do they rush to technical things and best practices? How much of that is a signal we send about our expectations or what they've seen about other projects?... [As for what outcomes to expect,] what I'm most interested in is the lived experience of grantees when they do this work – their experience proposing this DEI stuff and doing it regardless of whether the outcomes are what they'd hoped it would be. 'What can we learn from how we've shown up in these spaces?' ... **The strict outcomes and implementation markers we're used to don't always apply here. It's important to understand that, understand why, be ready to defend our decision not to have strict outcomes, and advocate for giving grantees the flexibility to learn and explore when we're pushed in other directions**." — Kevin Crouch (Education)

> **"The strict outcomes and implementation markers we're used to don't always apply here. It's important to understand that, understand why, be ready to defend our decision not to have strict outcomes, and advocate for giving grantees the flexibility to learn and explore when we're pushed in other directions."**
>
> — Kevin Crouch (Education)

What has been challenging about this work? Where have you felt the least equipped to support grantees? What additional knowledge, perspectives, or resources do you wish you had?

- "Equity has emerged as an important value for the performing arts program. **There's a tension between how explicit the program can be around this value and remain in alignment with the foundation**. For example, the program has sensed the need to define equity while the foundation intentionally has not.… Our performing arts program strategy approaches equity without saying equity [but instead talks about] the communities those nonprofits serve and whether they're communities that currently or previously haven't had access to engage in their cultural practice. **That community-centered approach is how we've been enacting our equity values**…. Hewlett prides itself on being hands-off with grantees and providing multi-year general operating support. Hewlett values humility and partnerships. But [the lack of clear definitions] makes it harder to go further when a grantee is seeking advice and doesn't have language…. [Also,] in a perfect world, I would have benefited from coaching on my own. Someone to talk to and bounce ideas off of…. **I could have used some one-on-one coaching** to help me think through the practical stuff but also hold the bigger picture, our values, etc." — Jessica Mele (Performing Arts)

> **"There's a tension between how explicit the program can be around this value [of equity] and remain in alignment with the foundation."**
>
> — Jessica Mele (Performing Arts)

- "Going forward, **I don't think this work should be some new initiative. It should be part and parcel of the work we do**. I'm working with the team now so each program officer owns it and adds it to their toolkit. Making OE-DEI grants requires work on how you enter into these conversations, how you probe for these things. **We can be a little more opportunistic**. [Imagine, for example, you're] having a conversation with a grantee and they're doing advocacy work in a Southern city. [You could talk with them about,] 'What does it mean to go into a city you've never been in before? What does that require of you and your staff and how you organize there? Here's a DEI capacity-building grant.' That's an example of how this work can complement the other work people do in their regular grantmaking. It's not that you talk to this one person about *x* work and this other person about DEI work, but it's interconnected…. **It's hard to talk about equity work with grantees unless your program does the work itself**." — Kevin Crouch (Education)
- "**[It's been hard for us to find] good consultants who know how to do the work and are available**. It seems like the same names surface on a regular basis, and that's not enough to cover what we have…. Finding a consultant that brings a more holistic approach to every aspect of the project is hard. [We're looking for consultants that can] do this work at both an internal organizational level and that can help them understand how to operate in the space they're working on – to help them bridge internal and external. The cherry on top would be a conservation background. [We also need] more money. **We've blown through our grant bucket on EID grants, and there's more demand**. If the foundation was willing to provide more money through the EPG team, that would help." — Andrea Keller Helsel (Environment)

We know that oppression is ingrained at both the systemic and individual levels. On the individual level, we keep hearing about the importance of "doing your own work." What does it look like to do your own work?

- "I learn the most from grantees who are really advanced in this work – **listening to how they articulate their philosophy, watching them do their work, looking at their processes that reflect these values**.… I learn a bit from going to events such as one grantee's annual series of progressive talks around justice… and some events from the Bay Area Justice Funders and Grantmakers in the Arts.… I've also gone to trainings on my own such as the Othering and Belonging conference and People's Institute for Survival and Beyond." — Emiko Ono (Performing Arts)
- "**I've done a lot of personal work with the National Equity Project**. I've been to a lot of their trainings and institutes. I've found them really helpful for how I show up with grantees and my personal work with equity. They've offered frameworks that are helpful to me…. I borrow a lot of language from them, and that helps me in how I talk with grantees about the work. **This is more than tactical work** – **there's an emotional component to it**. Their work has helped me not undercount that and be patient." — Kevin Crouch (Education)
- "**I feel like good listening and understanding the lived experience of others is what's most important**…. I journal each night and try to be reflective and introspective about conversations I had that day and the power dynamics that were at play…. I think I would benefit from seeing master DEI program officers interact with their grantees to see how they approach these conversations, what questions they ask, and how they create an atmosphere of encouraged vulnerability. **It's the real, authentic reactions that have the most to offer**." — David Sasaki (Global Development and Population)

Appendix E: Reflections on the Process

As Community Wealth Partners embarked on this project, we strove to live our value of *pursue equity and inclusion.* Steps we took to create an inclusive and equitable process included the following:

- Centering the voices and experiences of grantees,
- Crediting the work of others that we learned from,
- Ensuring everyone quoted had an opportunity to review and revise their quotes in the report and provide feedback on the context around their quotes or the narrative of their organization's journey, and
- Thinking of grantees as possible end-users (in addition to the foundation) when writing vignettes.

We referenced Chicago Beyond's *Why am I Always Being Researched?*[11] and the Equitable Evaluation Framework[12] as helpful guides, and we recognized the need to apply these principles more intentionally and consistently across our evaluation methodology.

In this project, we had two important insights that are worth sharing. First, in the process of writing the vignettes, we underestimated the significance of the ask of grantees to tell the story of their organization's equity journey. In order to give a full picture of their multifaceted journeys, grantees spent more time preparing for the interviews than we anticipated, often consulting with various stakeholders internally to ensure the story they shared represented a range of viewpoints. In two cases, grantees also asked to include more people in the interviews than we had envisioned, which affected the number of interview questions they could address in 90 minutes. When we sent drafts of the vignettes to grantees for review and feedback, grantees wanted to engage more people in the review process than we anticipated as well to ensure the narrative was an accurate representation. Had we fully recognized the significance of the ask we were making of grantees, we would have adjusted the way we made the ask, the interview protocol, and the timeframe for conducting interviews, drafting vignettes, and requesting review and approval. We also would have estimated more time for ourselves for this part of the process in the project scope.

Second, one consultant shared that the ask we were making of her to participate in an interview reinforced historic patterns of inequity. She, a Black woman, voiced concerns about a white-led consulting firm working for a white-led foundation co-opting her knowledge and experience for a report. Looking back, we see that some of the questions we wanted to ask were indeed mining her knowledge and experience, and there were opportunities to handle the request differently so that she felt fairly treated and adequately compensated. For example, we could have shared the interview protocol and offered compensation for her time at the start of our communications with her.

We share these reflections in the spirit of learning and improvement and because they may be helpful for the foundation to consider in future evaluations.

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[11] See Chicago Beyond's report "Why Am I Always Being Researched?"
[12] See the Equitable Evaluation Initiative's Equitable Evaluation Framework.

Appendix F: Acknowledgements

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