



Community Foundations as Leaders of Place-Based Equity Work

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CFLeads

Community Foundations
Leading Change

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GROUP**

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Despite uneven progress, America continues to be beset by deep inequities across various dimensions, including health outcomes, access to education, and economic opportunity. Creating a more just and fair society will require the collective effort of institutions and individuals across every sector, including corporations, governments, and civil society organizations. Community foundations have a particularly notable and distinct role to play in this effort. As regionally focused philanthropic organizations dedicated to collective well-being—with the unique ability to catalyze collective investment, policy change, and more—community foundations have an opportunity and a responsibility to act against historic and present-day inequities to accelerate progress within their jurisdictions. In recent years, this has become a primary focus for many community foundations across the U.S.

This paper and the accompanying case studies document the equity journeys of 13 community foundations that participated in the CFLeads Racial Equity Network (2017-present). Convened by CFLeads, a national network of community foundations, the Racial Equity Network aims to build the collective capacity of community foundations interested in advancing equity.¹ While each organization's equity journey is unique, there are common strategies driving success, similar lessons learned along the way, and shared challenges that the philanthropic sector as a whole must reckon with.

Advancing equity begins by understanding inequity, including its historical causes and present-day dynamics. Community foundations have studied their regions' histories, gathered community member perspectives, and analyzed qualitative and quantitative data to better understand the root causes and present-day impacts of disparities in their geographies, and the lived realities of their diverse constituents. This data-driven understanding has informed the development of programmatic priorities and approaches—for instance, the San Francisco Foundation's work to boost affordable housing supply and protect vulnerable communities from displacement, or the Greater Milwaukee Foundation's work to increase equitable access to high-quality, affordable child care.



Recognizing the systemic causes underlying many racial disparities, several community foundations have increased their focus on policy and systems change work. Simultaneously, community foundations are expanding participatory grantmaking (among other “trust-based approaches”) to incorporate community voices into foundation priorities and decisions.

Effective equity work also requires looking inward. Many community foundations have transformed their board recruitment and staff hiring practices to foster more diverse talent pipelines, applied equity and justice principles to the allocation of their investment assets, and much more. By committing to equity as a goal and holding themselves accountable to progress, community foundations have shown that they are prepared to move the needle on equity in their communities, and contribute to national momentum.

Community foundation staff and partners have consistently lifted up experiences of connection, fulfillment, and hope regarding their equity work, while also acknowledging the challenges that can come with it. Racial disparities in the U.S. are deep and long-standing, and making a tangible impact often requires cross-sector buy-in, massive multi-year investments, and a balance between urgency and patience. Some powerful constituents (e.g., donors, board members, political leaders) have resisted and even condemned community foundation equity work, consistent with a broader national backlash against diversity, equity and inclusion (DEI) initiatives. At the same time, community foundations must confront the philanthropic sector’s own complicity in systemic inequity and work proactively to build trust and share power with communities of color. By taking these challenges head on, many community foundations are providing a model for meaningful, committed, place-based equity work.



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The Landscape: A Nation of Systemic Inequity

Despite its ideals of equal rights and opportunities, the U.S. has been plagued by deep inequities and systems of oppression throughout its history. Over the centuries, many groups have had their rights, freedoms, and opportunities limited as a result of who they are, including women, people of color, immigrants, LGBTQI+ people, and people with disabilities. These inequities are ongoing and worthy of attention, both as standalone and intersectional issues. In recent years, especially since the COVID-19 pandemic and the murder of George Floyd, there has been a particular focus on racial equity in American society. Many have referred to this as a “national reckoning” on race.²

The problem of racial inequity is as old as the U.S. itself, a nation founded on the conquered lands of its Indigenous people, and grown with the forced labor of enslaved Black people. Today, many of our deepest disparities still fall along racial lines.³ In economic terms, the racial wealth gap has actually increased over the past 20 years, particularly in the aftermath of the subprime mortgage crisis, corporate bailouts, public sector cuts, and more.⁴ In 2019, median non-Hispanic White and Asian families had approximately \$200,000 in family wealth, which is about six times more than the median Hispanic family wealth (\$32,000), and about 14 times more than median Black family wealth (\$14,000).⁵ With respect to education attainment, as of 2020, 62 percent of Asian Americans and 41 percent of White Americans aged 25 and over had earned a college degree, compared to 28 percent of Black Americans, 21 percent of Hispanic Americans, and 20 percent of American Indians or Alaska Native people.⁶

With respect to health outcomes, Black Americans and American Indians experience the highest rates of infant and pregnancy-related mortality, which is one reason why these two populations have significantly lower-than-average life expectancies.⁷

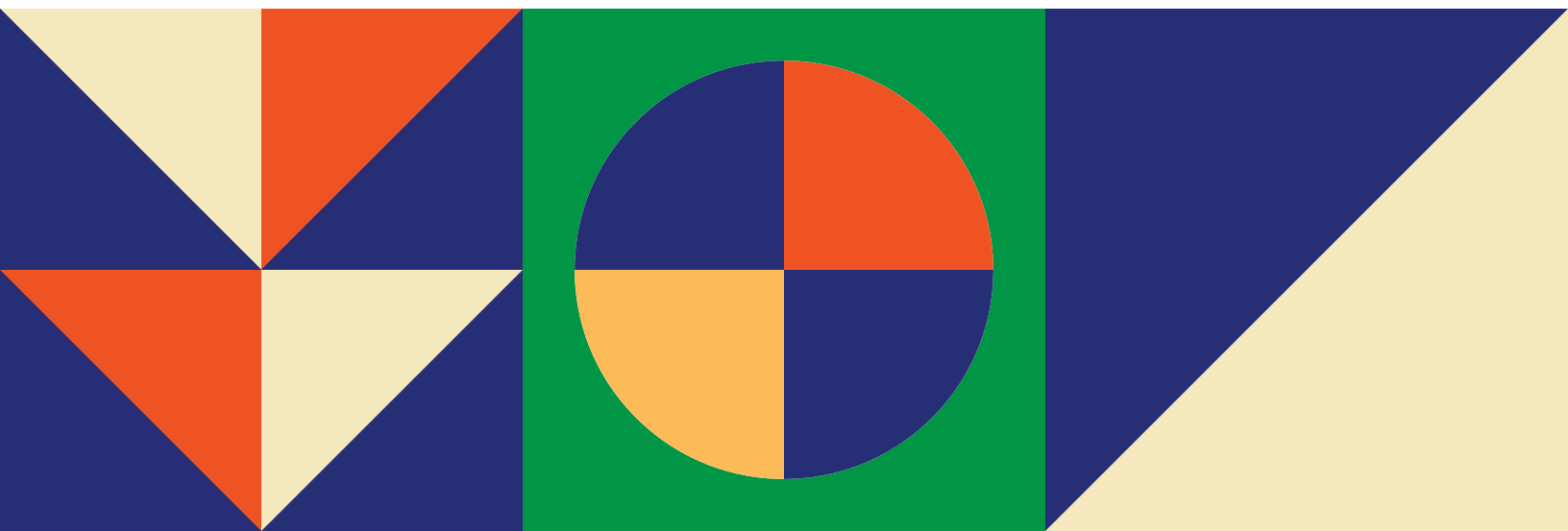
These disparities are not accidental byproducts of American life; they are the result of systemic racism (or “institutional racism”), which refers to deeply entrenched systems, laws, policies, practices, and norms that create and sustain widespread discrimination that disadvantages people of color.⁸ Systemic racism manifests across various aspects of life, including wealth, employment, housing, incarceration, and health.⁹ Of course, there are forms of systemic inequity in the U.S. beyond racism. For instance, the gender pay gap persists in the U.S., a manifestation of systemic sexism.¹⁰ Under a broad equity banner, some community foundations have pursued intersectional approaches, tackling the interplay between racism and sexism, for example. However, examining the equity journeys of all 13 community foundations profiled, a focus on racial equity is the common thread. By naming racial equity as one of its organizational priorities, CFLeads recognizes the unique problems posed by systemic racism in the U.S. and the need for community foundations to advance specific solutions.

While the histories and present-day realities of systemic racism are fairly consistent across the U.S., its manifestations can look different in different communities. For example, in Flint, Michigan, a majority-Black city, one manifestation of systemic racism was the 2014-2019 Flint water crisis, during which thousands of residents were exposed to dangerously high levels of lead in the city's drinking water.¹¹ According to a report by the Michigan Civil Rights Commission, "historical, structural, and systemic racism" played a significant role in the crisis. For over a year before a state of emergency was declared, Flint residents had been reporting discolored, bad-tasting, lead-tainted water—reports largely ignored by local and state leaders. According to the Civil Rights Commission report, "The people of Flint did not enjoy the equal protection of environmental or public health laws, nor did they have a meaningful voice in the decisions leading up to the Flint Water Crisis. Many argue they had no voice."¹²

Meanwhile, the San Francisco Bay Area is known for its thriving, tech-driven economy, but also experiences extreme levels of income and wealth inequality, with White and Asian residents earning approximately double the income of Black, Latino, and Native American residents.¹³ Housing in the region is extremely segregated, a legacy of redlining, a national practice that began in the 1930s.¹⁴

For more information on redlining and to explore redlining maps across the country, visit [Mapping Inequality](#).

Under the practice of redlining, the Federal Housing Authority ranked neighborhoods from "least risky" (green) to "most risky" (red) from a creditor's point of view, with Black residents and other people of color disproportionately grouped into red neighborhoods. For example, San Francisco's Fillmore District, a historically Black and low-income neighborhood, was marked red and given a grade of "hazardous."¹⁵ Redlining allowed banks and other institutions to deny loans and mortgages to certain neighborhoods and communities (like the Fillmore District), making it harder for residents to buy or improve their homes.¹⁶ This practice stifled economic growth and wealth creation in communities of color, and continues to drive racial wealth disparities to this day.¹⁷ Many neighborhoods previously redlined are now undergoing gentrification, with long-term residents being displaced as higher-income residents look to buy or rent property near the city center. This phenomenon has contributed to San Francisco's ongoing affordable housing crisis, with growth in rent prices far outpacing growth in wages for most workers. In part due to the legacy of redlining, this crisis has disproportionately impacted residents of color.¹⁸ These examples illustrate both the common causes and unique local consequences of racial inequity, and suggest the importance of community foundations' place-based equity work.



Fighting Local and Regional Inequities: The Role of Community Foundations

Dismantling systemic racism and advancing equitable opportunity requires collective effort, with the public, private, and nonprofit sectors each playing important roles. When it comes to tackling disparities within specific geographies, community foundations are uniquely positioned to catalyze local and regional impact. Community foundations are place-based philanthropic organizations dedicated to serving particular cities, counties, states, or regions. Community foundations emerged in the 20th century as a way for trust banks with charitable endowments to serve their communities.¹⁹ Eventually, community foundations expanded as a way to consolidate philanthropic giving by community members, often creating place-based endowments that could be responsive to community needs. Typically, community foundations manage both discretionary funds (where the foundation dictates allocation) and donor-advised funds (where the donor dictates allocation).²⁰

There are more than 900 community foundations operating in the U.S., varying widely in size and reach.²¹ For example, the Saint Paul & Minnesota Foundation serves over five million people across the entire state of Minnesota, manages approximately \$1.7B in total assets, and disburses more than \$90M in annual grants.²² Meanwhile the Jackson Community Foundation (JCF) serves a population of 160,000 in the area around Jackson, Michigan, manages about \$40M in total assets, and disburses about \$2M in annual grants.²³

In recent years, community foundations have focused increasingly on racism and its intersections with poverty, sexism, and other factors that contribute to disparities in outcomes. While different community foundations have faced different inflection points on their equity journeys, foundation leaders often cite the COVID-19 pandemic and its disproportionate impact on people of color,

the murder of George Floyd, and other recent instances of police brutality as key accelerants for their equity work.

Community foundations are uniquely positioned to tackle racial inequity in their jurisdictions because of their focus on community or regional improvement, their deep understanding of local contexts and dynamics, and their typically strong local relationships with nonprofit leaders (grantees), civic leaders, and others. And, as philanthropic entities, community foundations tend to engage with some of the wealthiest members of a community, and thus have the potential to inform significant strategic investments and partnerships.

CFLeads brings together hundreds of community foundations from across the country to “strengthen their community leadership muscle, share field innovations, and tackle the key issues of our time.”²⁴

For more information on CFLeads’ approach to community leadership, visit the CFLeads Framework for Community Leadership.

One of these key issues is racial equity. Since 2017 CFLeads has convened the “Racial Equity Network” for community foundations working to reduce inequities in their communities. The goal of the Racial Equity Network is to build collective capacity for advancing equity in the community foundation field. To accomplish this, CFLeads provides participants with opportunities for peer-to-peer learning, as well as connections to established learning resources from organizations like PolicyLink and the Racial Equity Institute. As of 2023, 22 community foundations have participated in the network, representing a wide range of geographies, demographics, and political contexts.

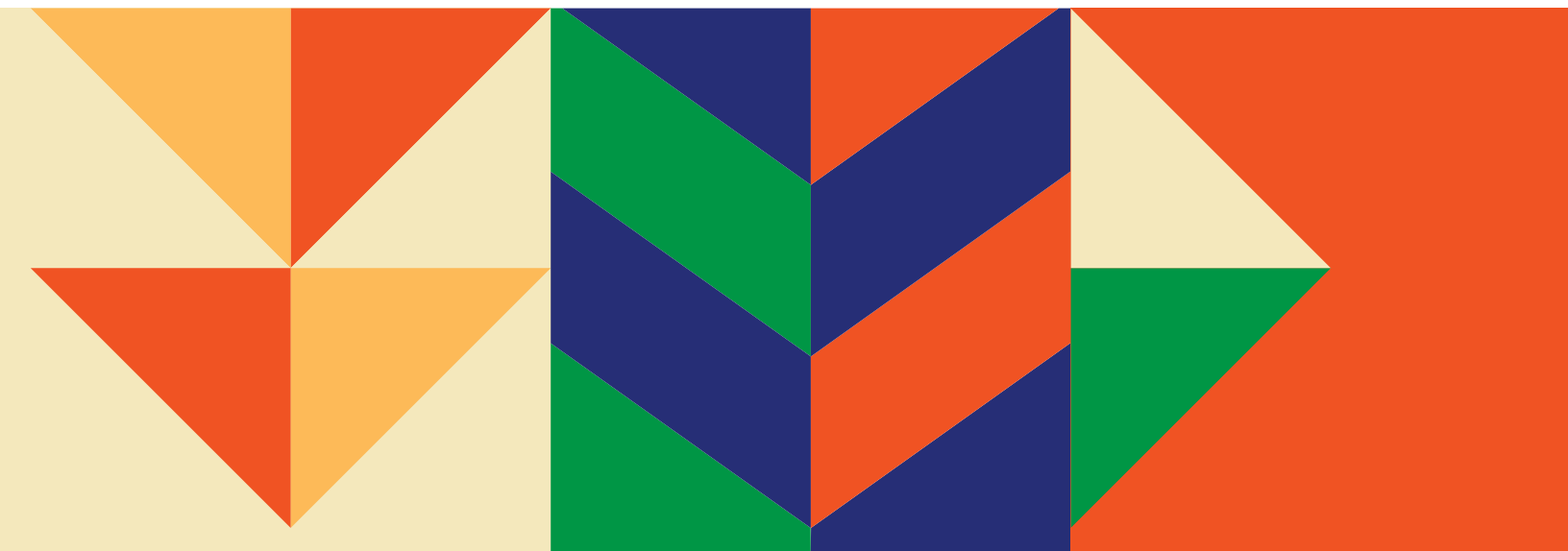
Key Strategies to Advance Equity

Public Equity Group (PEG) reviewed internal and external documents and conducted interviews with foundation leaders and community partners to create case studies documenting the equity journeys of 13 of the organizations that participated in the CFLeads Racial Equity Network. These case studies revealed several key strategies that community foundations have employed to advance equity in their communities.

Using Data to Understand the Problem

In order to reduce inequities in a community, one must first understand them. What disparities exist between racial groups? And what appears to have driven and/or continue driving these disparities? Studying regional history and collecting and analyzing data are the key to answering these questions. Many community foundations have conducted deep, data-driven analyses of their communities, studying the causes and consequences of inequities in education, health, housing, criminal justice, and economic outcomes to inform their programmatic work.

The Rochester Area Community Foundation launched the ACT Rochester initiative to collect, analyze, and disseminate data on key aspects of life in Rochester, with a stated goal of “changing the culture of decision-making through the use of credible, independent, and timely data.”²⁵ ACT Rochester’s work shines a particular light on racial and ethnic disparities. For example, the 2017 report, “Hard Facts: Race And Ethnicity in the Nine-County Greater Rochester Area,” highlighted that Black children in the region were four times more likely to be living in poverty than White children, and that Black and Hispanic residents were less than half as likely as White residents to own their home. The report attributes these disparities to “structural racism throughout our region” (including housing segregation and employment discrimination), and notes that disparities in the Rochester region were greater than in New York State or the U.S. as a whole.²⁶ These findings led the organization to focus its equity work on closing opportunity gaps and creating wealth for communities of color.



The Community Foundation for Greater Buffalo (CFGB) helped produce the “Racial Equity Dividend” report, documenting the changing demographics of the region, and the ongoing disparities between White people and people of color in education, criminal justice, and economic outcomes. The report also quantifies the potential impact of closing these gaps; for example, closing the racial equity gap in education and job readiness would translate to a \$1B increase in regional GDP per year.²⁷ According to Clotilde Perez-Bode Dedecker, former CFGB CEO, the Foundation’s approach is data-driven and pragmatic: “Yes, [focusing on equity] is the right thing to do, but also what we need to do given the demographics of our community.”

The Community Foundation of Greater Dubuque focused on community engagement in the creation and dissemination of its “Community Equity Profile” report. The Equity Profile provides quantitative data on disparities across various systems (including housing, education, and health care), and qualitative data on how these systems are impacting the lives of individual Dubuquers. The process of researching the report involved a series of community conversations and panel discussions, giving community members the opportunity to share personal experiences that help bring the data to life. For example, the report found that only 9 percent of Black households in Dubuque owned their home, compared to 67 percent of White households. The qualitative data found that people of color frequently reported bias in the home buying or renting process, including one community member who said, “it is hard to navigate the housing system here in an equitable way without microaggression, implicit bias and stereotyping happening throughout the process.”²⁸

For organizations interested in diagnosing place-based disparities, the National Equity Atlas serves as a useful starting point. Created jointly by PolicyLink (a national research and action institute focused on the advancement of racial and economic equity) and the Equity Research Institute at the University of Southern California, the tool provides data at the local and regional level on a variety of metrics, disaggregated by race, ethnicity, gender, and other demographic attributes.²⁹

For more information on place-based equity data, visit the [National Equity Atlas](#).

Many community foundations employed the Equity Atlas to identify key disparities in their own regions.



Focusing on Policy and Systems Change

Given that many of the nation's racial inequities are rooted in structures, systems, and policies (including slavery, segregation, redlining, sentencing guidelines, and others), community foundations and their partners are increasingly focused on policy and systems change as necessary remedies. By shifting local and state government and corporate policies, practices, norms, and investments, community foundations hope to achieve impact at a scale that would be impossible through direct grantmaking to individual non-profit organizations alone. The San Francisco Foundation (SFF) has embraced this goal, creating a Policy and Innovation team in 2019, and increasing its grantmaking to 501(c)(4) advocacy organizations, coalitions, and cross-sector partnerships leading critical policy fights. In response to the Bay Area's affordable housing crisis (which disproportionately impacts low- and middle-income residents, especially residents of color), SFF supported a network of organizations that successfully campaigned for a suite of state legislation designed to prevent homelessness, protect renters, preserve existing affordable housing, and produce new affordable homes. One bill, the California Tenant Protection Act of 2019, limited annual rent increases, and required landlords to have a "just cause" to terminate a tenancy.

Also in the Bay Area, the East Bay Community Foundation (EBCF) has invested in community organizing and power building with an aim of driving policy change. For example, through its Campaign for Just East Bay grant program, EBCF allows grantees to channel funds towards advocacy, lobbying, and other 501(c)(4) activities.

Grantees of this program have achieved significant policy wins at the state and city levels. For example, the Alliance of Californians for Community Empowerment Action helped pass the state Homelessness Prevention Act in 2023, which limited allowable rent increases and closed loopholes that enabled widespread evictions. At the city level, the Black Organizing Project successfully persuaded the Oakland Unified School District (OUSD) to approve the George Floyd Resolution, which made OUSD the first school district to get rid of its police department, and reallocate those resources towards services for students.³⁰ This philosophy of activism-focused grantmaking led Inside Philanthropy to recognize EBCF as the "Boldest Community Foundation" in 2019.³¹

The Seattle Foundation has also prioritized housing as one of its key areas for systems change. One key goal was achieving the passage of Proposition 1, a 2023 City of Seattle ballot measure that renewed the expiring Seattle Housing Levy.³² Since 1986, the Seattle Housing Levy has used property taxes to support a broad range of affordable housing programs, including production of affordable rental units, support for caregivers in emergency housing, and rent assistance for individuals and families at risk of eviction. The Seattle Foundation joined a coalition of allies in supporting Proposition 1 through the Yes for Homes initiative.³³



The ballot measure was approved with overwhelming support (nearly 70% of votes), with the renewed Housing Levy creating nearly \$1B in funding for affordable housing initiatives, including developing over 3,000 new affordable homes, and providing rent assistance and housing stability services to over 9,000 low-income individuals and families.³⁴

In the fight against systemic injustice, community foundations are demonstrating that policy and systems change work can drive significant, durable changes, from housing stability to wealth creation and beyond, and can advance equity at a scale beyond what would be possible through direct service grantmaking alone. There are several networks and resources available to organizations interested in equity-focused policy work, including the Equity Research Institute (directed by Manuel Pastor), and the Government Alliance on Race and Equity (a joint project of Race Forward and the Othering and Belonging Institute).³⁵

For more information on equity-focused policy analysis, visit the Equity Research Institute or the Government Alliance on Race and Equity.

Engaging Community Members in Participatory Grantmaking

Even as policy and systems change work becomes more central to many community foundations' work, grantmaking to direct service organizations and initiatives still lies at the core of many community foundations' focus. To center equity in the grantmaking process, many community foundations have created equity-specific grant programs and also empowered community members as participants and partners in grantmaking decisions.

Participatory grantmaking means “ceding grantmaking power to the very communities affected by funding decisions.”³⁶ The model recognizes the deep understanding and expertise that community members possess regarding their families', neighborhoods' and communities' aspirations, challenges, and opportunities for progress.

The model recognizes the deep understanding and expertise that community members possess regarding their families', neighborhoods' and communities' aspirations, challenges, and opportunities for progress. By engaging community members (alongside other experts) and transferring more and more decision-making power to those most affected by present conditions and future decisions, participatory grantmaking fosters solutions that are more responsive to community needs, and hence, more effective. While this is not a new idea in philanthropy, participatory grantmaking has become increasingly common in recent years.³⁷ Foundation Center provides a guide (“Deciding Together: Shifting Power and Resources Through Participatory Grantmaking”) that outlines challenges, lessons learned, and best practices for engaging in participatory grantmaking.³⁸

For community foundations, participatory grantmaking has been especially important in the design and implementation of equity-focused grant programs. In 2020, the Community Foundation Santa Cruz County established its flagship program in service of racial equity, Rise Together, in response to the murder of George Floyd and the disproportionate impacts of the COVID-19 pandemic on communities of color. From the outset, Rise Together was designed to employ a participatory grantmaking approach, bringing together a coalition of 32 Black, Indigenous, and People of Color (BIPOC) leaders from the community to work alongside a team of staff from across the Foundation. Together, this group tackled five core goals: to increase upward economic mobility for people of color, to amplify art and storytelling from BIPOC communities, to change policies and systems in the name of anti-racism, to deliver essential services to communities that need them most, and to ensure robust and sustainable funding for communities of color in Santa Cruz County.³⁹

For the Community Foundation Santa Cruz County, it was essential to let community members of color take the lead in this process. Hilary Bryant, the Foundation's Donor Services Director, reflected: "We [the Foundation] were the convener ... but we are not directing the work... It's all of ours collectively, and we wanted to create spaces where BIPOC leaders have a seat at the table and set the direction for how the work would proceed; and we would play a supporting role."

In 2022, Rise Together distributed over \$400,000 in grants to a variety of organizations advancing the above goals. For example, the Amah Mutsun Land Trust received funding for a new position producing and distributing healthy, organic, and local foods to the Amah Mutsun Tribal community. Another grantee, Housing Santa Cruz County, advocates for affordable housing with a focus on communities of color countywide.⁴⁰

While community foundations have the most agency over their discretionary grant programs, they are also taking steps to encourage and influence donors to increase their own, direct giving to equity-focused organizations and initiatives through donor-advised grants, often in "alignment" with the foundations' equity work. In addition to the Rise Together initiative, Community Foundation Santa Cruz County has created guidance for its donor-advised funds. In a document called "Tips on Giving Locally for Racial Equity," the Foundation encourages donors to prioritize racial equity in their own, direct giving, and presents key questions to consider in assessing where to direct donations, including: whether BIPOC communities benefit from

an organization's work, whether the organization has BIPOC leaders, and whether the organization has "authentic relationships" with communities of color.⁴¹

Other community foundations have created funds specifically for donors interested in advancing equity. For example, the Seattle Foundation created the Creative Equity Fund, which was launched in 2018 to exclusively support BIPOC-led community organizations using arts and culture to advance racial justice in King County, WA. Like the Rise Together program, the Creative Equity Fund employs a participatory grantmaking approach, including groups of community members who design the grant application process and make all funding decisions.⁴²

In addition to funding equity initiatives, community foundations have also made efforts to prevent funds from flowing to groups that oppose equity. In 2020, for example, the Saint Paul & Minnesota Foundation adopted a policy prohibiting grantmaking to organizations deemed to be hate groups. Over a series of meetings, the board discussed, debated, and eventually approved this policy. To operationalize this policy, the Foundation uses the Southern Poverty Law Center's hate list as a screening tool and is currently working to broaden the tool with other sources.



Driving Narrative Change and Building Community Cohesion

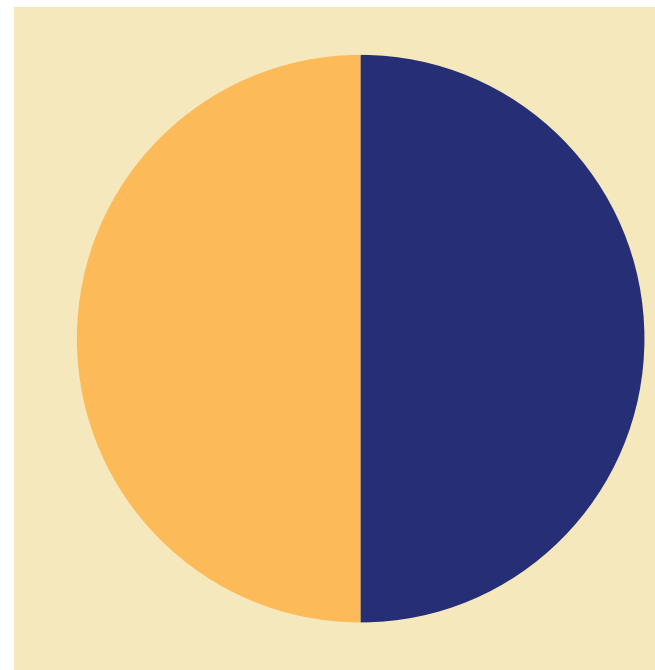
In addition to policy advocacy and grantmaking work, community foundations also have invested in driving narrative change and building community cohesion. This involves helping lift up and “center” the voices and experiences of historically marginalized communities, while creating opportunities for community-wide learning and reflection on the causes of and solutions to injustice. These initiatives have served to build understanding across demographic divides and help grow attention to and focus on equity, including as a community-wide value and priority.

In 2012, IBM opened an office in Dubuque, Iowa, that brought over 1,000 employees of diverse racial backgrounds to the predominantly White city. Soon thereafter, IBM leaders approached the City of Dubuque and other community leaders with a problem: several IBM employees of color had encountered “horrific displays of racism,” according to Nancy Van Milligen, President and CEO of the Community Foundation of Greater Dubuque. To address this problem, the Foundation launched the Inclusive Dubuque initiative, bringing together leaders from faith, education, business, nonprofit, and government dedicated to advancing equity in the community. One goal of Inclusive Dubuque was to collect and disseminate residents’ stories and experiences, as well as data regarding various racial and ethnic disparities in the community. Another goal was to change the narrative around what it means to be a Dubuquer. The “I’m a Dubuquer” campaign featured video of diverse Dubuque community members holding signs of how they define themselves, culminating with the shared identification, “I’m a Dubuquer.” The campaign aimed to show new community members that they belong, and to encourage inclusivity from lifelong Dubuquers.⁴³ Speaking about Inclusive Dubuque, one community member said, “Learning about other people is not done in a book. You have to be able to get out there and talk to different people. Inclusive Dubuque gives the opportunity for that to happen. It helps break down barriers.”

For organizations interested in values-based messaging and driving narrative change around equity, The Opportunity Agenda provides a useful communications toolkit.)

For more information on driving narrative change, consult The Opportunity Agenda’s Communications Toolkit.

With funds from the W.K. Kellogg Foundation for Truth, Racial Healing, and Transformation (TRHT) work, several community foundations have invested in opportunities for community-wide learning and reflection.⁴⁴ For example, the Kalamazoo Community Foundation has hosted several Racial Healing Circles, providing opportunities for community members to come together, share stories, and “uncover truths about racism and the different ways it harms us and others in the community.”⁴⁵



Transforming Recruitment, Hiring, and Organizational Culture

While working towards greater equity within their regions, community foundations also have looked inward, examining their own practices with respect to staff and board recruitment, training, retention, and other aspects of talent management and organizational culture. For many community foundations, this internal work felt just as vital as their more community-facing work. “I can’t imagine doing one and not the other,” said one community foundation leader. “If we are convening these [equity-focused] conversations in the community, and not walking the path internally, then it’s not really authentic.”

When it comes to staff hiring, many community foundations have focused on removing barriers to application. For example, the Saint Paul & Minnesota Foundation re-evaluated all of its job descriptions, assessing whether stated educational prerequisites were actually necessary to do the job. The Foundation also began posting its jobs in new places, including through smaller local news outlets and affinity groups, to attract more diverse candidate pools. Likewise, the San Antonio Area Foundation has focused on identifying and recruiting new staff “who have worked in the field” serving the region’s underserved populations; and the Community Foundation of Western Massachusetts has incorporated questions about how job applicants would approach various aspects of diversity, equity, and inclusion (DEI) as part of their work.

When it comes to the composition of their boards, philanthropic foundations remain overwhelmingly White. In 2022, 91 percent of foundation board members were White (compared to 60 percent of the U.S. population), with individuals of color comprising only 9 percent of foundation board members (despite comprising 40 percent of the U.S. population).⁴⁶ Community foundations have pursued various approaches to attract more diverse board members. The Jackson Community Foundation, for example, is rolling out an open application process for its board of trustees, hoping to attract community members who might not otherwise have been on the Foundation’s radar. The Foundation, which focuses on education, has also added two high school age students to its board.

Developing an equitable staff and board recruitment process is only the beginning. Community foundations also have reshaped their internal policies and protocols to foster equity-focused cultures. Training is a key part of this. Several foundations have established mandatory racial equity training for all staff and board members, often partnering with expert organizations like the Racial Equity Institute or the National Conference on Community and Justice.



Community foundation leaders tout the importance of these training sessions in creating a common internal language around equity, and centering equity as a key component of organizational culture. Practices around pay and benefits also have been scrutinized and improved. The Waco Foundation, for example, hired an external consultant to conduct pay equity audits, resulting in greater standardization and transparency in staff pay.

In many instances, these internal shifts have resulted in increased staff and board diversity, increased staff satisfaction, and an improved ability to advance equity in the community.

“ We are slowly transforming the Foundation ... When I used to look at the Foundation from the outside, it felt like a place for ‘other’ people, people of wealth, older people ... My hope is that now, as people watch our work and see who is working with us, they feel that this is a home for everyone.”

Hilary Bryant

Donor Services Director, Community Foundation Santa Cruz County

Leveraging a Foundation's Financial and Operational Assets

Many community foundations manage large endowments, including financial portfolios and physical assets. In recent years, more community foundations have experimented with ways to allocate these assets in a way that advances equity and is aligned with the organization's overall mission.

Under the leadership of Chief Investment Officer Shannon O'Leary, the Saint Paul & Minnesota Foundation has made significant strides in this area. "In foundations, a lot of attention is paid to the front of [the] house, which is grant operations," O'Leary said. "The Foundation's assets are the engine in the back that drives those grants, yet receive far less attention." The Saint Paul & Minnesota Foundation has \$1.7B in assets; according to O'Leary, "those assets can have an impact that is potentially much greater in the long term and that is complementary to the grantmaking work." The flip side of this coin is that, if a foundation does not look closely at its investments, they can actually undermine the mission-driven work.

This led to an extensive evaluation of the Saint Paul & Minnesota Foundation's assets. Partnering with an environmental, social, and governance (ESG) firm, the Foundation assessed its entire portfolio, surveying all of its investment managers along various ESG and DEI dimensions. Informed by this work, the Foundation's board passed a resolution in December 2022 mandating the creation of a mission-aligned investment policy, incorporating DEI and ESG considerations. As an example of what types of investments would be avoided under the policy, O'Leary mentioned private real estate assets: "There are players in the multi-family housing space, very large companies, who are evicting individuals in the low-to-moderate income category, who cannot afford 20-30 percent upticks in rent. We would like to avoid those types of investments." The Foundation is also looking intentionally for investment opportunities that are place-based and mission-aligned. For example, O'Leary's team has invested in The Coven, a diverse and women-led local company providing coworking spaces for underserved communities.

In 2022, the Saint Paul & Minnesota Foundation became the first community foundation in the U.S. to sign on to the United Nations' Principles for Responsible Investment.⁴⁷ Joining 4,600 signatories across 50 countries, the Foundation formalized its commitment to responsible investment practices, including incorporating ESG considerations into investment decisions, and seeking ESG disclosures from the funds and companies the Foundation invests in.

The East Bay Community Foundation (EBCF) is also advancing mission-aligned investment strategies, with a focus on investments that "have a regenerative impact on BIPOC communities." EBCF defines its mission-related investments as those that deliver market-rate returns, while aligning with the values of the investor. For EBCF, this involves looking at multiple bottom lines, including competitive financial returns, investments aligned with racial equity and other values, and investments with a Bay Area focus. Investing in this way has led EBCF to choose fund managers like Raven Indigenous Capital Partners, an Indigenous-led and owned social finance company.⁴⁸

Community foundations can also drive equity through the placement and operation of their physical assets. For example, the Greater Milwaukee Foundation (GMF) has made a catalytic, place-based investment in the historically Black neighborhoods around Martin Luther King Drive. Upon completion, GMF will move its headquarters to the "ThriveOn King" building—a partnership with Royal Capital and the Medical College of Wisconsin—that will provide essential services and expanded amenities to the neighborhood, including an early childhood education center, office and meeting spaces, and over 70 mixed-income apartments. The location was specifically chosen with a goal of bringing economic development to the predominantly Black, north Milwaukee neighborhoods of Halyard, Harambee, and Brewers Hill. Part of this has involved soliciting community input in the design process and hiring and training local workers and businesses to carry out the construction.⁴⁹

Overcoming Challenges

Equity work often requires swimming upstream, against the tide of the decisions, systems, and norms (past and present) that pervade American life. The challenges incumbent in equity work are not unique to community foundations; they are well-documented in the broader philanthropic sector, the nonprofit world, and beyond. Overcoming these challenges is critical in making more significant and sustained progress towards a more fair and equitable nation.

Achieving Population-Level Impact

In the past, many philanthropic entities measured their impact in purely financial terms—dollars disbursed via grants or assets under management, for example. Over the past few decades, however, philanthropic organizations, policymakers, and others have become more interested in connecting the dots from investment “dollars spent” to resulting “changes on the ground,” which, in the context of equity work, should mean more equitable outcomes in the economy, health, education, and justice, among other gains. Work on economic equity, for example, should ultimately translate to a closing of the racial wealth gap. However, despite increased focus on racial equity, many racial disparities continue to fester and grow.⁵⁰ Reversing these trends and achieving progress for entire sub-groups (“population-level impacts”) will require long-term commitments and investments, and innovative, multi-pronged, multi-sector approaches.

In a 2019 Stanford Social Innovation Review article, Jim Shelton—an experienced leader in both philanthropy and government—lays out how philanthropists can improve social mobility in the U.S. at the population-level. Shelton posits that achieving impact on a large scale will ultimately require engaging government systems, which “are the only ones designed for universality.” This reflects a previously discussed trend in the equity work of community foundations: an increased focus on policy and systems change.

The San Francisco Foundation’s work to advance state legislation protecting tenant rights is one example of this. Another example comes from the Greater Milwaukee Foundation (GMF), whose policy advocacy has driven additional government funding to make early childhood education accessible to all children aged 0–3. GMF advocated with Wisconsin’s Congressional delegation to help secure \$148M from the January 2021 federal stimulus and \$580M from the American Rescue Plan for early childhood education in the state. GMF then coordinated a community advocacy letter to the Milwaukee Common Council, urging the Council to prioritize early childhood care and education in the allocation of its federal stimulus funds.⁵¹

In addition to engaging government, Shelton believes philanthropy must do more to engage the for-profit sector, nodding to social impact bonds, performance contracts, and public-private community development partnerships as models to reward businesses for contributing to social solutions. Some community foundations are engaged here too. For example, the Saint Paul & Minnesota Foundation was a founding member of a public-private partnership called ConnectedMN (including the companies Best Buy and Comcast), designed to bring internet access and tech devices to underserved communities across the state. The partnership has provided tech devices, internet access, and support services to an estimated 68,000 students across the state, with a focus on Black, Indigenous, low-income, and rural communities.⁵²

Finally, Shelton emphasizes the importance of collaboration and coordination between philanthropic entities themselves, as opposed to “uncoordinated individual investments.” By pooling resources and sharing learnings, philanthropic organizations can achieve more together than they could alone.⁵³

A 2020 report by the Bridgespan Group echoes Shelton’s vision for achieving population-level impact, advocating for the importance of “building the field.” According to Bridgespan’s Lija Farnham, Emma Northam, Zoe Tamaki, and Cora Daniels, the work of an individual organization is “insufficient to solve complex, evolving social problems.” In order to achieve population-level change, organizations must harness “meaningful, intentional coordination across a field’s actors.”⁵⁴ Community foundations are recognizing this too and increasingly embracing the role of convenor in their equity work. For example, the Community Foundation of Greater Buffalo is the co-founder and convenor of the Greater Buffalo Racial Equity Roundtable, which brings together business, government, and non-profit organizations to advance racial equity in the region. Currently the Roundtable includes 350 partners to advance initiatives like the Youth Employment Coalition, which aims to provide access to career pathways for 16–24 year olds, and Juvenile Justice Works, which focus on advancing equitable outcomes for young people involved in the juvenile justice system.⁵⁵

In addition to a focus on systems change and multi-sector collaboration, achieving population-level impact requires ongoing evaluation and accountability. Rockefeller Philanthropy Advisors developed a guide for assessing philanthropic impact. The guide encourages philanthropists to ask themselves a series of nine questions to determine what they are trying to accomplish and if it is working. The questions range from establishing basic goals (“what problem are you trying to solve?”) to defining success (“what will success look like?”) to identifying possible evaluation methods (“who else is working on this, and what assessment tools are they using?”).⁵⁶ These are key questions for philanthropic and other mission-driven organizations to consider.

Once metrics are decided upon, organizations must consistently collect data to measure progress and hold themselves accountable to their goals. To that end, several community foundations, including the Jackson Community Foundation and the Community Foundation Santa Cruz County, have invested in dashboards to track community progress against equity goals. The Equitable Evaluation Initiative provides a valuable set of frameworks and resources to organizations interested in evaluating their impact in a culturally sensitive and methodologically rigorous way.⁵⁷

Some philanthropic entities have started to disburse their assets more rapidly in an attempt to achieve impact more quickly. Traditionally, philanthropic foundations give about 5 percent of their endowments in annual grants (consistent with minimum IRS requirements), allowing the endowment to grow (so long as market returns exceed five percent, which they nearly always do) and allowing the foundation to grow and sustain in perpetuity. However, in response to urgent needs and evidence that many problems only grow more intractable and expensive with time, some foundations have embraced occasional spending from their endowments, often exceeding 10 percent per year.⁵⁸ The idea of spending endowed funds is often complicated for community foundations, which exist to support place-based needs over the long-term. That said, there is a healthy debate to be had within and between community foundations on how to raise and invest funds in a way that best balances the urgency of achieving impact now with the uncertainty of what comes next.

Building Trust and Sharing Power

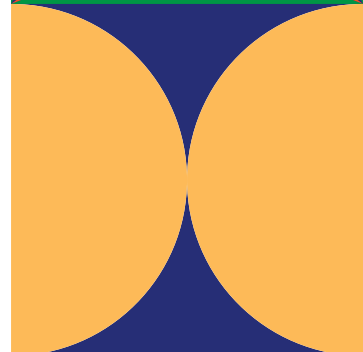
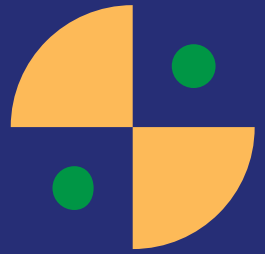
For philanthropic organizations engaged in equity work, building trust and truly sharing power with community members beyond their staff, boards, and donors – especially community members of color – remains a work in progress. In fact, many experts and philanthropic leaders themselves have called out the sector’s own complicity in systems of racial bias and injustice.⁵⁹ “Philanthropy has been complicit with keeping things as they are,” said a senior community foundation leader. “The money for philanthropy was built on the backs of Black people, Indigenous people,” echoed one of her peers.

The idea of “decolonizing philanthropy” involves critically examining and reshaping power dynamics, processes, and practices within the philanthropic sector to address historical injustices and systemic inequalities.⁶⁰ “Participatory grantmaking” and “trust-based philanthropy” have emerged as approaches under this umbrella, designed to build greater partnership and trust between philanthropic organizations and the communities they serve. These approaches provide community members with increased ownership over the direction and use of grant funding, and make grantmaking more effective by incorporating the lived experiences of those closest to the problem.⁶¹

The fundamental goals of practices like participatory grantmaking and trust-based philanthropy, according to the National Philanthropic Trust, are to advance “a charitable approach that reimagines the relationships between donors, nonprofits, and communities to rebalance power and decision making.”⁶² There are several principles and tactics embedded within these approaches, including increasing unrestricted grantmaking (trusting grantees to deploy the funds as they see fit), simplifying the grant application and reporting process, involving community members in grantmaking decisions, and building strong, lasting relationships between funders and grantees.⁶³



While participatory and trust-based approaches represent steps in the right direction, many feel that true power sharing and redistribution requires a more radical reimagining of philanthropic models, including refining those aspects of the tax code that incentivize the creation of philanthropic funds, in lieu of tax payments, prioritizing investments in reparations and racial repair, and more. One proponent of radical reimagining, the Decolonizing Wealth Project, aims to “build an Indigenous and Black-led philanthropic infrastructure through which we can model best practices from a reparations approach.”⁶⁴ Likewise, the Bridgespan Group also advocates for philanthropy to play a role in securing reparations for Black people in America, investing in a national movement to achieve federal policy change, funding efforts to help Black communities reclaim wrongfully stolen land and assets, and piloting wealth-building programs like guaranteed income and baby bonds in Black communities. In a 2023 Bridgespan report, Richard Wallace (founder and executive director of Equity and Transformation) said, “For me, there’s no way to get to equity without reparations... Fixing inequity is very simple – put the resources stolen from our communities back into those communities.”⁶⁵



Facing Pushback

As equity initiatives have expanded in recent years, many have responded with enthusiasm and hope. But others have been resistant to the change. In a 2022 national survey of employees across sectors, about one-third reported that DEI had “received more attention” within their organizations over the prior two years. This was met with pushback: 42 percent of employees reported that their peers viewed DEI efforts as divisive, and another 42 percent reported that their peers resented DEI efforts. The authors grouped pushback against DEI efforts into three categories: denial (“this isn’t a problem”); disengagement (“this isn’t my problem”); and derailing (“what about other problems?”).⁶⁶

Most community foundations working on equity issues have experienced some form of pushback. For example, several community foundations have lost board members and seen long-time donors move their funds elsewhere. Reflecting on this challenge, one community foundation leader said, “As we became more clear about our equity position, some people say, ‘no, that’s not what I signed up for.’ It feels like the cost of doing business; but in terms of the emotional aspect, it’s always hard.” In some cases, community members also have expressed opposition to an increased focus on racial equity, especially in more conservative regions of the country. “In some of our communities, ‘All Lives Matter’ is still a thing,” reflected a community foundation partner working in the Southern U.S.

In the face of pushback, community foundations have held firm in their commitment to equity, while also trying to build understanding with those who may be resistant to the work. One community foundation leader reflected, “The challenge is being vigilant and responsive all the time ... and showing up in spaces even when it’s hard.” Returning to an earlier theme, some community foundations have found that using data can be a helpful way to bridge ideological divides. “Data can be like an oven mitt for hot issues,” said one community foundation leader. “It can help people acknowledge that we have an issue with racial equity in this community.”

Language and framing also can play a role in preventing and mitigating community pushback. For example, one community foundation found that presenting its goal as “closing the economic equity gap” resonated more with a broad range of stakeholders than did naming “racial equity” specifically.

Despite facing resistance from some constituents, community foundations also have attracted new donors, partners, and board members who are energized by an increasing commitment to racial equity work. Community foundations that have lost donors or board members have also gained new ones, and many have experienced an overall growth in fundraising, while focusing their efforts on racial equity.

Navigating Legal Risks

In June 2023, the Supreme Court of the U.S. (SCOTUS) issued a decision finding that affirmative action in admissions in higher education is unconstitutional. The decision impacts any organization that receives federal funds, prohibiting them from using race as a factor to determine to whom to provide a service or benefit. In the wake of this, conservative lawmakers and groups have sought to similarly challenge the use of race in employment and contracting decisions.⁶⁷ The Executive Director of Consumers’ Research, a conservative advocacy group, has already said that the SCOTUS decision “will put the wind in the sails of groups like ours, who want to get the woke, racially based hiring and promotion schemes out of corporate America.”⁶⁸ These developments have significant implications for any employers, including community foundations, interested in advancing equity through their recruitment and hiring practices. Community foundations must also be wary that their programming does not select beneficiaries exclusively on the basis of race.

Even for higher education institutions directly limited by the Supreme Court's decision, there are still ways to strive for inclusivity in admissions. While race "in and of itself" can no longer be considered in college admissions decisions, its impact on an applicant's life experience remains a legal and relevant consideration. According to U.S. Associate Attorney General Vanita Gupta, "Race can be relevant to a person's life or a lived experience, and may impact one's development, motivations, academic interests or personal or professional aspirations. That impact can still be considered." Many colleges have communicated that the applicant's essay can be a space to discuss the impact of race, and some have created essay prompts to specifically ask about this.⁶⁹

Community foundations can take a similar approach to advancing principles of diversity, equity, and inclusion, while avoiding potential legal challenges. Employers, including community foundations, can foster a workplace with a diverse range of lived experiences (including those related to a person's race), while not using race as a deciding factor in employment decisions. Among other strategies, experts advise removing unnecessary barriers to job applications (such as educational prerequisites)⁷⁰, and emphasizing skills-based hiring as opposed to overly focusing on education or experience.⁷¹ Expanding outreach to diverse colleges and communities, and emphasizing a culture of inclusivity in job postings and interviews can also help broaden the candidate pool. Many community foundations are currently employing these approaches, among them the Saint Paul & Minnesota Foundation, the San Antonio Area Foundation, and the Community Foundation of Western Massachusetts.

Similar strategies can be applied to make grantmaking more inclusive and effective, including simplifying grant application and reporting requirements, making connections with BIPOC-led nonprofits, and involving community members in grantmaking decisions. While these approaches remain legal and effective, the SCOTUS decision and the subsequent legal landscape demand particular caution. Community foundations and other employers should avoid specific race- or gender-based quotas in hiring, promotion, or grantmaking, or any other practice that may indicate a preference based solely on an applicant's identity.⁷²



Conclusion

Across a diverse set of geographic jurisdictions, community foundations are leading an honest reckoning with racial inequity and adapting their programming to target the most harmful and unjust disparities. These ongoing equity journeys, while inherently challenging, are crucial to the core mission of community foundations: to elevate the well-being of all residents of a particular city, county, or region. This cannot be achieved if people of color are systematically disadvantaged.

The experiences of community foundations in the CFLeads Racial Equity Network offer a blueprint for promising, place-based equity work, and a pathway to advancing equity one community at a time. Using qualitative and quantitative data, community foundations have captured the specific contours of racial inequity in their geographies, and targeted their programmatic strategies accordingly. Recognizing the deep-seated nature of racial disparities, community foundations have increasingly focused on policy and systems change work, which has the potential to drive impact at scale. Through participatory grantmaking and narrative campaigns, foundations have empowered communities of color, and elevated their stories to foster increased inclusivity and understanding. Internally, community foundations have led by example, overhauling hiring and recruitment practices, and shifting investment allocations to align with equity principles. By focusing on impact and holding firm in the face of inevitable pushback, community foundations can leverage their unique positioning to foster more equitable societies at the local and regional levels and ultimately contribute to national transformation.



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