



Community Foundation of Western Massachusetts

Case Study | November 2023



CFLeads

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EQUITY
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The Community Foundation of Western Massachusetts has been focused on equity since the development of its 2020 strategic plan, which set a goal of advancing equity and opportunity for all.

The journey started internally, with efforts to diversify staff and board, and build an equity-focused internal culture. Subsequently, the Foundation turned its attention to making its grantmaking, scholarship programs, and donor-facing work more accessible and inclusive.

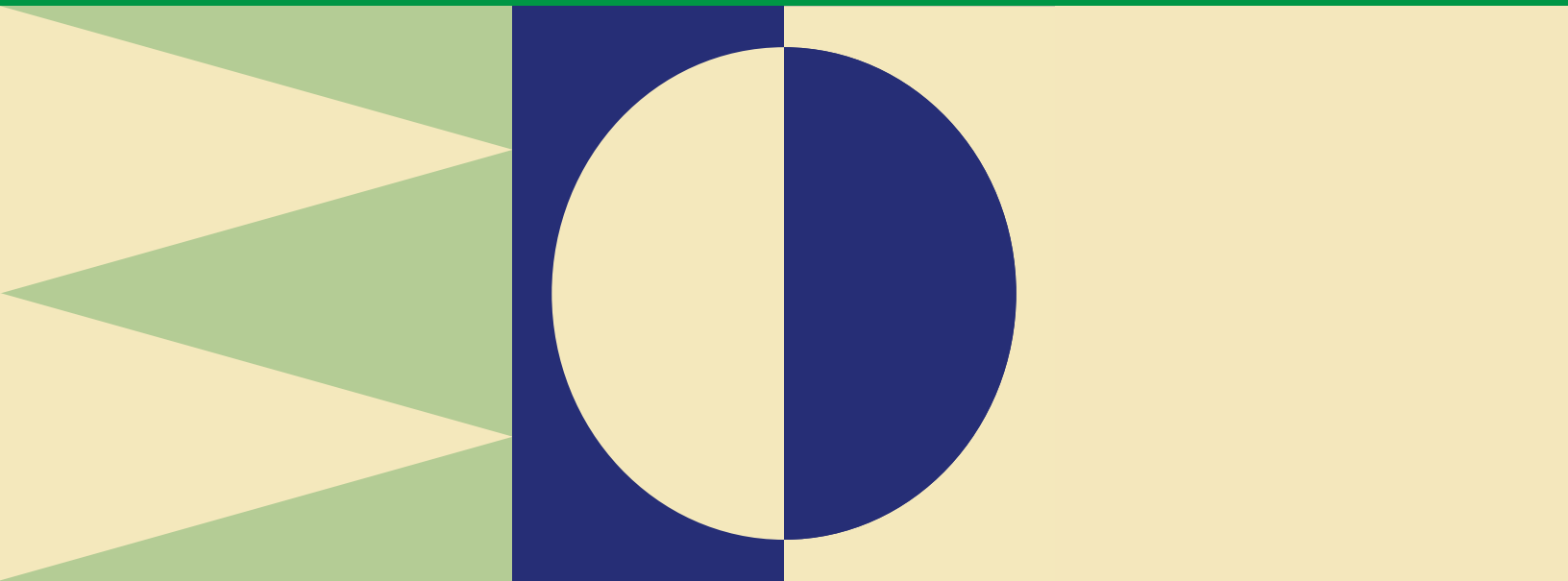


Table of Contents

Introduction	2
COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS CASE STUDY:	
Origins: A Strategic Plan Focused on Equity	4
An Inside-Out Journey	5
Creating a Culture of Equity	6
A New Philosophy: Grantmaking & Scholarships	8
Expanding the Donor Pool	10
Facing Pushback	11
The Journey Ahead	11
Endnotes	12



Introduction

Founded in 1991, the Community Foundation of Western Massachusetts serves Franklin, Hampshire, and Hampden Counties, which sit east of Berkshire County in the western part of the state. In recent years, the Foundation has distributed approximately \$16M in grants and \$1.6M in scholarships annually.

The Foundation has been on a concerted journey to advance equity in its work since 2019, when it engaged in a strategic planning process that resulted in a strategic vision with equity and opportunity at its center. This led to the hiring of Briana Wales-Thaxton as the Foundation's Vice President for People and Culture.

Wales-Thaxton brought a background in educational equity and also calls the region home. "I've been working towards social justice in Western Massachusetts my whole life," she said, "and I've experienced it as a community with values rooted in equity and justice."

The Foundation's equity journey has been a holistic one, involving both internal shifts to hiring and culture, and external shifts to community-facing programs. Internally, the Foundation has overhauled its hiring practices and policies to prioritize diversity, equity, and inclusion; and has implemented several training sessions designed to establish an equity-centered organizational culture.

Externally, the Foundation has executed on its new strategic vision by creating new grant programs for social justice and racial equity, and reshaping its grant and scholarship processes to include broader community input.



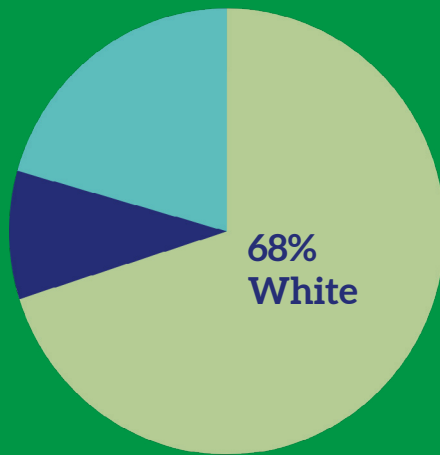
700,000

People live in
Franklin, Hampshire,
and Hampden.

3

Counties

Over half of this population lives in Hampden County, which includes Springfield, MA, the largest city in the region. The region features a mix of urban, suburban, and rural communities.



9% Black

20% Hispanic¹

There exist significant racial disparities within the three counties, with people of color experiencing less favorable outcomes in education², health³, and criminal justice⁴.



15%

Regional Poverty Rate⁵



12%

National Poverty Rate⁶

Origins: A Strategic Plan Focused on Equity

In 2019, the Community Foundation of Western Massachusetts embarked on a strategic planning process. Megan Burke, the current President and CEO, joined the Foundation in January 2023, but she shared her perspective on the origins of the Foundation's equity journey:

"Through that strategic planning process [beginning in 2019], our leadership and board determined that one of the five priority areas for the organization would be diversity, equity, and inclusion (DEI) in workplaces and institutions, starting with our own."

Paul Murphy, the current Chair of the Board of Trustees, has served as a trustee since 2015, and also recalls this strategic planning process as a critical inflection point:

"The big change of focus came with our strategic plan ... that's when DEI really became a point of focus at the board level."

This process culminated in a new strategic vision with equity at its center: "The Community

Foundation of Western Massachusetts is committed to increasing equity and opportunity so that all who live in our three counties have access to a satisfying quality of life."

Beneath this overall vision statement, the plan identified five distinct priorities, including:

1. Driving charitable giving from the region and beyond;
2. Supporting DEI in workplaces and institutions, starting with the Foundation itself;
3. Providing accessible, high-quality early childhood education to all;
4. Providing accessible and affordable post-secondary education and training; and
5. Cultivating a vibrant local arts ecosystem.

These priorities were selected based on an identification of community needs and an assessment of the Foundation's greatest strengths.



An Inside-Out Journey

According to Colleen Kucinski, who served as the Foundation's Director of Education Impact and Partnerships, the organization's equity journey began by looking inward: "I think the equity journey we've been on had to start internally in order to become external." Much of this work involved attempts to diversify the staff, board, and volunteer base. Reflecting back on the organization at the time she joined, Briana Wales-Thaxton said, "It was a pretty White-led, White-staffed organization ... It was a little bit insular."

As the VP for People and Culture, Wales-Thaxton was tasked with creating a multi-year DEI plan, which is now embedded in the organization's operations. On the hiring side, the Foundation developed interview questions that would ask

candidates about their approach to DEI issues, and reshaped its interview process to create the conditions for neurodiverse candidates to be successful. Part of this shift involved removing "unnecessary qualifications" from job postings.

When Wales-Thaxton joined the organization in 2021 there were only a handful of employees who identified as people of color; as of 2023, this was up to 9 people, or one third of the Foundation's 27 staff members. The board of trustees has become extremely diverse as well, with approximately 80 percent women and 50 percent people of color among the trustees.

“ We still have more to do, but we have changed the ways we describe jobs so there are no barriers to apply in terms of qualifications that aren't necessary to perform the job.”

Megan Burke

Predisent and CEO, Community Foundation of Western Massachusetts

Creating a Culture of Equity

Along with diversifying its staff and board, the Foundation understood the importance of building a culture of equity. Briana Wales-Thaxton shared that a significant part of this effort involved training:

“We’ve held more than a dozen training sessions for staff, including a session on gender oppression, a four-part series with the National Conference for Community and Justice, sessions on implicit bias, and the intersections of race with other aspects of identity such as class, and staff-led ‘lunch and learn’ sessions on DEI.”

Some of these trainings are mandatory and others are optional, but participation rates have been very high. “Even the optional ones are well attended,” said Joanna Ballantine, the Foundation’s Vice President for Philanthropic Services.

The Foundation has also made several changes to policies and practices with equity in mind. According to President and CEO Megan Burke,

“We want to make this a great place to work for everybody, for people who have been underrepresented in the past, for people with disabilities or people who are neurodivergent too.”

With this goal, the Foundation revised its employee handbook to create a formal DEI policy, to remove gendered pronouns, and to allow for more flexibility in terms of the location and timing of employees’ work. The Foundation also set an expectation that everyone at the organization is responsible for advancing DEI work, including participating in the training sessions described above, and participating in events in the broader community.



Key Figures from 2022:

Turning to its community-facing work, the Community Foundation of Western Massachusetts sought to make its grantmaking and scholarship processes more accessible and equitable.

\$15M total awarded grants

\$1.6M awarded scholarships and interest-free loans

800 students supported by the Foundation⁷

A New Philosophy Around Grantmaking and Scholarships

On the grantmaking side, the Foundation has made a candid commitment to racial equity. According to Paul Murphy, Chair of the Board of Trustees,

“We emphasized making grants to organizations with Black, Indigenous, and other people of color (BIPOC) leaders and serving BIPOC populations as a priority, especially in our latest round of grantmaking.”

Another aspect of this was simplifying the grant applications themselves. According to Denise Hurst, the Foundation’s Vice President of Community Impact and Partnerships, “There used to be 8-12 questions on our grant applications, and now we are down to four. This is a huge shift to make sure barriers are

mitigated for nonprofits applying, especially smaller nonprofits that do not always have the capacity for complicated applications.” The Foundation has also focused on collecting feedback from grant applicants and grantees to see how its process could be improved. According to Nicole Bourdon, a Senior Program Officer who focuses on the arts:

“We involve grantees’ feedback heavily in designing the process ... With all of our funded organizations and artists, we have check-ins after they get the grant, and then we tweak the next grant round based on the feedback we receive.”

Hurst added that the Foundation also collects feedback from grant applicants who did not receive funding, to continue to cultivate



relationships with those organizations, and to better understand any barriers they may have faced in the application process. This shift in the organization's grantmaking process is reflected in recent grants. For example, the Foundation funds the Pioneer Valley Workers Center (PVWC), which advocates on behalf of agricultural workers in Western Massachusetts, many of whom are immigrants. PVWC fights for fair pay, safe working conditions, and access to healthcare for agricultural workers. In a recent policy victory, PVWC, working in coalition with other organizations, advocated for the passage of a Massachusetts law that will allow all residents to obtain a drivers license, regardless of immigration status.⁸

In addition to its grantmaking, the Foundation disburses college scholarships and interest-free loans to local students. This process has also been reshaped around principles of equity. Colleen Kucinski, who oversaw the Foundation's scholarships, reflected:

"We had to look at everything to see what may be creating barriers to students accessing our program ... the way students

applied, the way we asked essay questions, the way our scholarship reviewers were evaluating applicants, and which students were getting the majority of our scholarship dollars."

This assessment resulted in several shifts, including attempts to remove cultural bias from essay questions, and instructing scholarship reviewers to prioritize the student's overall story and deprioritize grammar or sentence structure in their evaluation of an applicant's essay.

The Foundation also implemented quantitative tracking of its scholarship applicant and recipient pools, measuring what portion of each group identified as BIPOC or first-generation college students. According to Megan Burke, the Foundation's President and CEO, the whole orientation of the scholarship process is now to "remove obstacles that first-generation, low-income, and students of color face when trying to access or complete higher education."



Expanding the Donor Pool

A recent phase of the Foundation's equity journey has involved the work of the philanthropic services department, which cultivates and maintains relationships with donors.

"The philanthropic side is the newest member of the equity journey given the newness of the team," said Joanna Ballantine, VP of Philanthropic Services. Joanna shared that,

"We are in the process of defining what equitable philanthropic practices mean ... how to diversify the donor base while also working with long-standing donors to share our perspective and invite them to join us on this journey."

As Ballantine admits, this part of the journey is in its early stages. The team is engaged in a deep conversation, including with volunteers, on what it means to put definitions of equity in philanthropy into practice. They are also entertaining several ideas, including creating more equity-focused funds like the recently established Racial Equity Social Justice Fund.

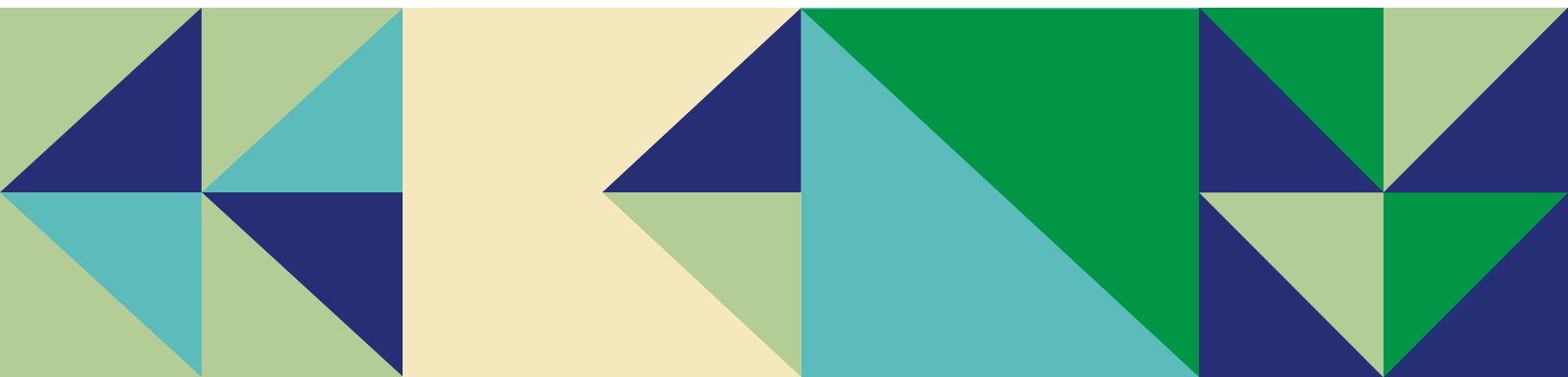
On a practical level, they are generating QR codes to link to an online donations page, and exploring accepting donations via Venmo, CashApp, or other virtual forms. According to Keith McKittrick, the Foundation's Director of Philanthropic Operations,

the team's goal is "to make sure that every type of donor is able to make gifts in as many ways as possible ... to make it accessible." Much like the rest of the staff, this team has also become more diverse.

In its communications to donors and other stakeholders, the Foundation is striving to adopt an asset framing approach that lifts up the strengths of grantees and communities. According to Emma Mesa-Melendez, the Foundation's Director of Communications:

"We've been rethinking how we market to avoid those practices that have been used in philanthropy for so long, like tokenism and saviorism. We want to make sure we're representing our grantees and the communities they serve by amplifying their brilliance as opposed to their needs."

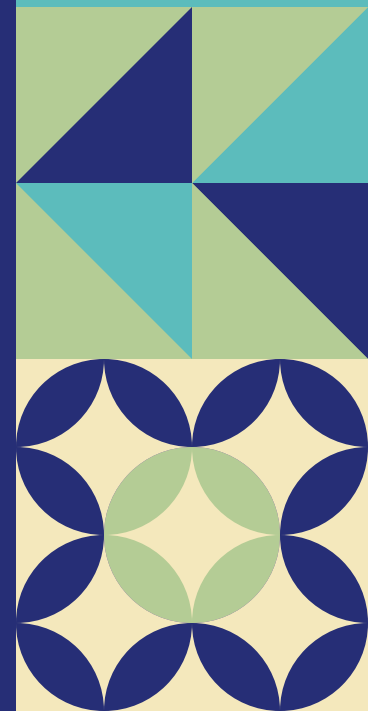
The communications team has also been thoughtful about how they think about their donor audience. "We've been focused on our visual presentation," said Mesa-Melendez, "making sure it speaks to donors of all ages, races, ethnicities, and genders."



Facing Pushback

The Foundation's equity journey has not been without challenges. While there has been significant board leadership on issues of equity, it has not always been unanimous. Briana Wales-Thaxton reflected, "We had one trustee opt out ... as we became more clear about our equity position, some people say, 'no, that's not what I signed up for.' It feels like a cost of doing business, but in terms of the emotional aspect, it's always hard to lose colleagues." One long-time donor moved their fund elsewhere. Despite these challenges, the Foundation is holding firm in its commitment to equity. "We have to stay the course," Wales-Thaxton said, "We have to be steadfast and unapologetic."

Participation in the CFLeads Equity Network, a series of convenings bringing together community foundations from around the country working to advance equity, has helped hold the Foundation accountable to its goals. According to Wales-Thaxton: "Having the peer network, having the check-ins, it really helped keep the issue [of equity] on the front burner for me, our CEO, and our board chair ... you have to develop an action plan after each session, and that really helped [us] hold ourselves accountable."



The Journey Ahead

For Emma Mesa-Melendez, one of the biggest challenges of the equity journey has been realizing that there is no endpoint to it: "There's no destination we're attempting to arrive at. It's constant work, and the work changes everyday." Near-term priorities for the Foundation include granting \$500,000 from the recently established Racial Equity and Social Justice Fund via a community-led participatory grantmaking process, and holding a racial equity summit called Equity in the 413 for organizations and businesses in the region.

The Foundation also wants to measure the impact of its work in the communities it serves, using surveys and interviews to evaluate whether it is achieving its equity goals. Internally, the Foundation is committed to continuing its journey of diversifying staff and building an equity-driven culture. "We're still moving from representation to inclusion and finally towards belonging," said Briana Wales-Thaxton.



Endnotes

- 1 US Census Bureau, “Quick Facts: Franklin County, Hampshire County, and Hampden County”
- 2 Massachusetts Education Equity Partnership, “#1 for Some,” September 2018
- 3 Baystate Health, “Bridging the Gaps,” October 2022
- 4 Juvenile Justice Policy and Data Board, “Racial and Ethnic Disparities at the Front Door of Massachusetts’ Juvenile Justice System,” November 2022
- 5 US Census Bureau, “Quick Facts: Franklin County, Hampshire County, and Hampden County”
- 6 US Census Bureau, “Poverty in the United States: 2021”
- 7 Community Foundation of Western Massachusetts, “Our Impact”
- 8 Community Foundation of Western Massachusetts, “2022 Annual Report”

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