The Road to Achieving Equity
12 Findings from a Field Scan of Foundations That Are Embracing Equity

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Over the past few years, equity has emerged as a key issue in American society, described as the "defining issue of our time" by authors and speakers in various fields. In the first half of 2016, the Robert Wood Johnson Foundation asked Putnam Consulting Group to conduct a field scan to learn how other foundations are working to incorporate equity — both in their internal operations and in their grantmaking. We conducted 30 conversations with staff leaders at 15 foundations considered by their peers to be on the forefront in embracing equity. Here is a quick look at our key findings:

1) Definitions of "equity" vary, but having one is important. Definitions among our interviewees included viewing "equity" as a synonym for "social justice" or "equality" or "race equity," the latter proving to be a dominant frame. However, most of the foundations we spoke with admitted they had no "official" definition of equity. Many foundations appear to guide their work via intuition rather than a clear definition. We did find that foundations with a clear definition seemed to have codified equity theories of change, frameworks, and plans more completely than those foundations that had no clear definition.

2) CEO and board leadership is critical for adopting an equity focus and transitioning foundation culture. This was a universal finding and recommendation from every foundation interview. Although not every foundation set out with leadership on board (in many cases the push for equity came from within the ranks), all agreed that securing and defining a commitment to equity from the top was imperative. The CEOs we spoke to described their roles as setting the tone and direction for staff in making equity a priority, managing their boards to lead or support equity-focused grantmaking or internal operational changes, and publicly endorsing and promoting their foundations' equity work.

3) Equity should start from within. Many of the interviewees we spoke with – and particularly those who led or worked on program staff – pointed out that a foundation needs to "walk the talk" when it comes to incorporating equity. After all, asking grantees to explore significant culture shifts without doing so oneself reflects at best, a misunderstanding of what it means to pursue equity and at worst, an inauthentic commitment to doing so.

4) Having individual staff who value equity moves a foundation much farther and faster along the culture-shift curve. In addition, foundations that embrace equity are more likely to attract and hire staff who share the foundation's equity values. The foundations we spoke with who were the most comfortable discussing their approaches to incorporating equity into their operations and grantmaking were also those most likely to point to the expertise and commitment among the staff they'd hired.

5) Common language within a foundation is important. Foundations that took the time to create common descriptions and explanations of their equity work found that it proved valuable in helping staff to coalesce around the foundation's intent and focus. A common language gave a shared framework and baseline understanding that staff could use as a launching pad for their explorations of equity in their individual roles and for the foundation as a whole. It also helped the foundation communicate internally and externally about its intent, purpose, role, and work to achieve equity. Several interviewees noted that a common language about equity throughout the field of philanthropy also would be helpful.

6) Equity focuses have emerged both organically and intentionally. Some foundations we interviewed described their focus on equity as simply being "part of our DNA" — a mind-set or way of thinking that emerged naturally from the shared values of staff and leadership, without any formal structure or process. Other foundations reported a very intentional, studied approach to exploring and incorporating equity. As one would suspect, the latter foundations typically have more documentation to share, such as theories of change, logic models, processes, statements of intent, etc.

7) Achieving equity requires systems change (internal and external). Many internal foundation systems, such as those for grantmaking, hiring, or investing, can result in unintentional inequities. Every foundation we spoke with that appears to be tackling equity issues in a meaningful way is doing so through a systems approach — that is, they look for embedded practices, inherent biases, and customary frames of thought that deliver unintended consequences for marginalized populations inside and outside their organizations. They focus on changing their internal systems, such as hiring practices or compensation ranges, with just as much (if not more) vigor as they apply to external systems that perpetuate inequity.

8) Foundations that "lean in" to difficult conversations experience more meaningful shifts in culture. Truly embracing equity requires a culture shift, and that can be messy and uncomfortable. Theories of change and other academic tools can provide common language and intellectual context for embracing equity and can offer a more comfortable space in which to begin discussing equity. But true shifts in thinking, understanding, and belief in equity only come from very personal and interpersonal discussions about life experiences and effects of racism or inequity. It is very important for foundations to understand the personal journeys and transitions that staff will need to make in order to achieve a culture shift.

9) Data drives conversation. Several foundations pointed to the importance of using disaggregated data to point out where inequities lie. Disaggregated data (segmented by race, gender, geography or other standards) can provide a new picture of what is happening in marginalized populations and can create an "ah-ha" moment for staff and partners. It also offers a "safe," less controversial way to enter conversations about implicit bias, institutional racism or sexism, or other topics that require exploration in order to create an effective equity framework.

10) Facilitation and consultation are highly valuable — and in most cases absolutely necessary. Every foundation we spoke with used outside consultants in some capacity to facilitate the foundation's understanding and/or definitions of equity, to help develop an equity framework, and — most importantly — to help guide employees through explorations and discussions about equity. There is often no "one size fits all" solution to facilitation and training, especially for a foundation with a large staff. The better bet is to customize training to each unit's wants and needs, and to include staff in the design and planning for each training session.

11) Equity is hard to measure. While several foundations have created work plans for incorporating equity into their work, none that we interviewed have yet clearly defined or quantified the outcomes they seek to achieve, although some are in the process of doing so. The lack of clear measures could be the nature of the beast. Approaching work in an equitable way begins with shifts in thinking, which can be hard to measure. Those shifts in thinking then lead to shifts in behavior, which can still be difficult to quantify. Once behavior changes are manifest in everyday work, it can become possible to see end results.

12) Advancing equity is a journey, not a destination. The pursuit of equity never ends. The foundations we spoke to acknowledge that embracing equity means embracing a constant practice in the way foundation board and staff think about the issues they wish to address within their stated missions and how equity plays a role in every decision.

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