



*National Network of
Consultants to Grantmakers*
A TIDES CENTER PROJECT

The Diversity, Equity, and Inclusion Toolkit for Consultants to Grantmakers

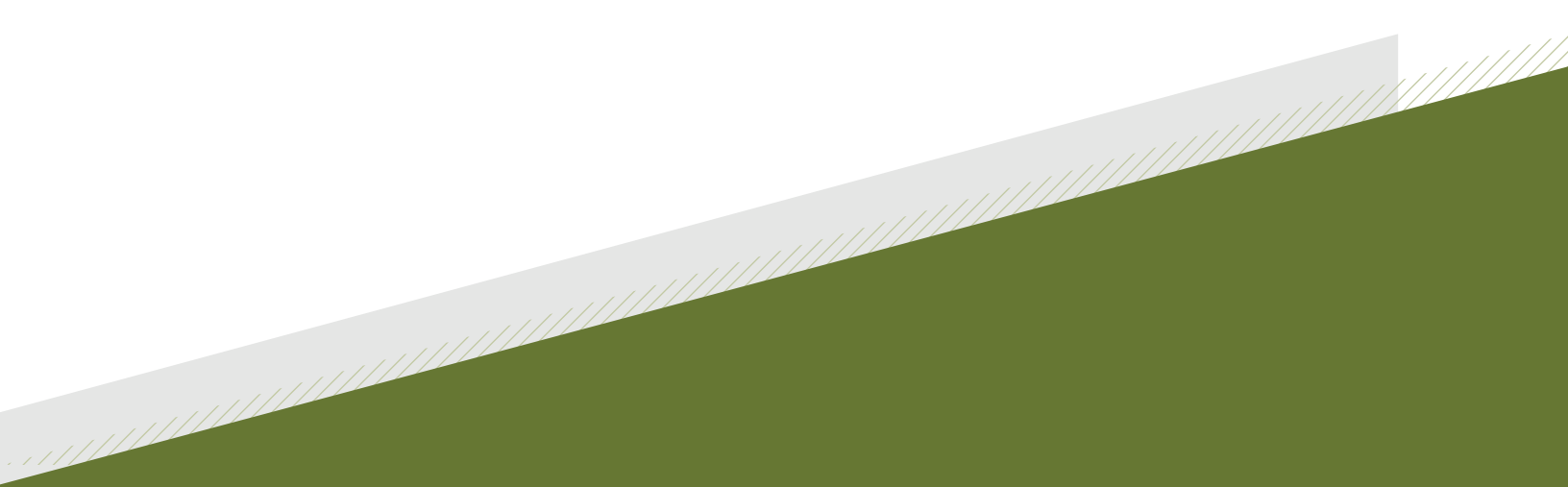
A Resource from the National Network of
to Grantmakers

June 2019



TABLE OF CONTENTS

<u>Introduction</u>	3
<u>Getting Started: How To Approach The Toolkit</u>	5
<u>Our Go-To Collection of DEI Resources for Philanthropy Consultants</u>	8
<u>Frameworks</u>	9
<u>Grantmaking Strategy</u>	11
<u>Planning & Evaluation</u>	13
<u>Organizational Culture & Leadership</u>	14
<u>Research</u>	16
<u>Engaging Communities & Partners</u>	17
<u>Perspectives from the Field</u>	18
<u>Gita Gulati-Partee</u>	19
<u>Marcus Littles</u>	20
<u>Jennifer Laszlo Mizrahi</u>	21
<u>Stephanie Clohesy</u>	23
<u>Riki Wilchins</u>	25
<u>Kris Putnam-Walkerly</u>	27
<u>Catherine Hyde Townsend</u>	28
<u>David Murrasse</u>	30
<u>Leticia Alcántar And Pat Krackov</u>	31
<u>Highlights from NCCG’s Equity Webinar Series</u>	32
<u>Conclusion</u>	35
<u>About NCCG</u>	37



Introduction

Beyond buzzwords. That's your goal in guiding philanthropy clients through the complexities of their work in diversity, equity, and inclusion (DEI). Even as the field is devoting increased attention to DEI, much less focus is being given to concrete institutional and community change. Our DEI Toolkit was developed to address that gap and bolster your work with clients to support this transformation.

We've asked our network of consultants to share their preferred, go-to resources as they engage a variety of grantmaking partners in advancing a DEI agenda. These curated materials provide need-to-know information to sharpen your own knowledge, inquiry, and practice.

If your core practice doesn't focus on DEI, do you need this toolkit? Absolutely. It is useful to have a working knowledge of DEI best practices. You need to recognize when your clients are struggling with this issue and where you can find the resources they require. You need this toolkit to help all clients understand how to apply a DEI lens to their work, and to feel comfortable doing so. At the least, you need to feel confident enough to ask: **"Have you looked at this issue through a DEI lens?"**

This toolkit is by no means a comprehensive guide. In fact, no resource or tool can quickly or easily fix the complex dynamics associated with DEI. Consider it a jumping-off point, the start of your continuous journey in exploring the many resources available on diversity, equity, and inclusion. Indeed, the volume of DEI research and analysis can be overwhelming. That's why this primer – specifically developed for philanthropy consultants – highlights key resources recommended by leading experts whose

work focuses on DEI impact, as well as issues such as racial and gender justice, intersectionality, LGBTQ+ rights, and empowerment for people with disabilities.

The toolkit has two parts. The first is a concise collection of DEI resources, highlighting areas where many grantmakers often use consultant support:

- Developing grantmaking priorities or fine-tuning program areas
- Cultivating and maintaining strong relationships with grantees and community partners
- Establishing and maintaining a supportive organizational culture that leads to effective grantmaking
- Demonstrating trusted community leadership and collaboration
- Leveraging research, evaluation, and data as a tool for learning and impact

We have listed recommended resources in the categories of **Frameworks, Grantmaking Strategy, Planning & Evaluation, Organizational Culture & Leadership, Research, and Engaging Communities & Partnerships**. However, you'll find that, in many cases, several resources cover overlapping aspects of how to approach diversity, equity, and inclusion in philanthropy. This toolkit also leans heavily on the definitions and dimensions of DEI provided through the field leadership of our colleagues at the [D5 Coalition](#).

The second part of this toolkit highlights perspectives from the field, sharing how consultants have effectively partnered with philanthropy clients to advance diversity, equity, and inclusion. These case studies capture the heart of DEI, giving insights and advice in navigating the challenges of this crucial work.

Getting Started: How To Approach The Toolkit

To get the greatest impact from this toolkit, we recommend first assessing your own learning pathway toward DEI expertise, as well as the learning pathways of your clients.

A learning pathway is your journey of experiences and education as you seek to develop deeper mastery of DEI issues. Whether you are at a very early stage in understanding DEI or more advanced, it is important to continually refine your learning pathway. Reflecting on your own pathway helps hone your ability to assess your clients' needs. It also helps clients clarify what they require to reach their goals of advancing a philanthropic agenda in support of diversity, equity, and inclusion.

Where to begin? One useful tool to evaluate your current DEI knowledge is this self-assessment first designed by the [D5 Coalition](#) and modified here to support the work of philanthropy consultants. This assessment takes about 30 minutes to complete.

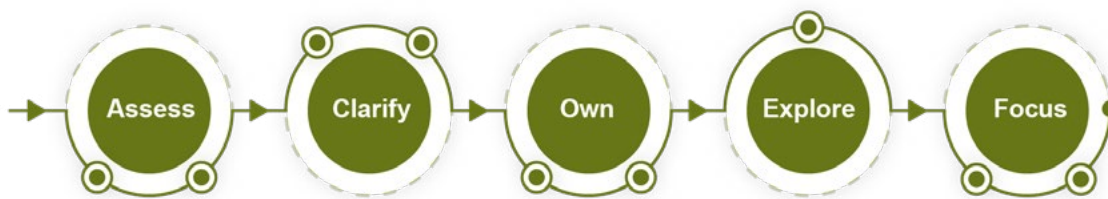
Click [here](#) to get started.

When you're in tune with the expertise you already possess, you'll be better equipped to identify gaps in your DEI knowledge. You'll realize where you need to stretch yourself to increase your skill set – by using resources in this DEI Toolkit.

Perhaps more importantly, you'll be able to make an honest assessment of whether you need to bring in a peer consultant for your client. You'll know when to tap other resources within the consultant community to ensure that your clients are accessing the expertise, technical assistance, and additional supports that drive success.

Assessing your DEI knowledge is also useful in making decisions about taking on new clients or projects.

With that in mind, here's a useful framework to help develop learning pathways for you and your clients.



ASSESS: Where are you, your consulting practice and your grantmaking client on the DEI journey? What is the role of lived experiences in crafting your journey?

CLARIFY: How do you want to advance your knowledge and expertise around diversity, equity, and inclusion in philanthropy? What does your grantmaking client need in order to advance its DEI work and commitment?

OWN: Where are your gaps – in knowledge, skill, or practice – around diversity, equity, and inclusion? What gaps in expertise or experience does your client need to overcome?

EXPLORE: How do you and your client want to address those gaps?

FOCUS: How can you focus and best use your commitment to diversity, equity, and inclusion in your consulting practice? How can your client focus its DEI commitment in philanthropy?

This DEI Toolkit will support your practice and increase your proficiency and knowledge. Whether you're new to DEI work or well on your journey, the resources here provide a valuable asset for strengthening the field of philanthropy and its dedication to diversity, equity, and inclusion.

Our Go-To Collection of DEI Resources for Philanthropy Consultants

01

[Frameworks](#)

02

[Grantmaking Strategy](#)

03

[Planning & Evaluation](#)

04

[Organizational Culture & Leadership](#)

05

[Research](#)

06

[Engaging Communities & Partners](#)

These resources provide guidance to help your clients build the foundation for DEI work in a variety of contexts.

- 1. Gender Transformative Giving: The Next Phase in Feminist Philanthropy?**
If your clients want to apply a true gender lens to their work, this Women's Funding Network report provides relevant research and action steps to help you guide an organization through that process. It includes a range of practical tools, including a "gender dictionary," a breakdown of what this approach means for both the grantmaker and grantees, and a dozen steps to take within your client's organization, with peer funders, and with grant recipients. [[Source](#); Women's Funding Network, 2014]
- 2. Racial Equity & Inclusion Action Guide.**
The seven steps in this guide from The Annie E. Casey Foundation help you show your clients how to incorporate race equity and inclusion at every stage of their work. Content includes a framework for understanding different dimensions of racism; details on how to identify and analyze root causes of racial inequities; information on setting goals for race equity and measuring progress and much more. [[Source](#); The Annie E. Casey Foundation, 2015]
- 3. Consulting with a Racial Equity Lens Tool.** As you work with clients to explore the challenges of privilege, power, and oppression, you can use these lists of thought-provoking questions from racial equity consultant Maggie Potapchuk to shape and strengthen their journey. Also included are suggested action research questions to reflect on after each consulting stage. [[Source](#); MP Associates, n.d.]
- 4. Racial Equity – Funders for LGBTQ Issues.** This online toolkit from Funders for LGBTQ Issues is from almost a decade ago, but it's still a great resource today. It provides a wide range of grantmaking resources, commentaries and best practices to help you support your clients in implementing an LGBTQ racial equity lens into their grantmaking and internal operations. If nothing else, download the [Frameworks and Approaches](#) chart that illustrates the intersectionality of grantmaking. [[Source](#); Funders for LGBTQ Issues, n.d.]
- 5. Systems Thinking and Race: Workshop Summary.** When your client is ready for a deep dive into structural racialization, the faces of oppression, and patterns of racialization over the years, this training manual, courtesy of John A. Powell and The California Endowment, can serve as your guide. The material explains difficult concepts with engaging graphics and case studies. It also provides exercises you can use with clients – both individuals and groups – that create clarity and personal connections to each concept. [[Source](#); The California Endowment, 2011]
- 6. Responsive Philanthropy (Spring 2015).** The articles in this special issue of the Responsive Philanthropy journal, published by National Committee for Responsive Philanthropy, focus on how philanthropy professionals can combat implicit bias. Starting with a comprehensive overview of what implicit bias means, authors also describe how implicit bias affects Native Americans, gender equity, and institutional racism. As a whole, the issue provides a solid resource for you to explore these areas with your clients. [[Source](#); National Committee for Responsive Philanthropy, 2015]

- 7. Leading at the Intersections: An Introduction to the Intersectional Approach Model for Policy & Social Change.** This report from the Women of Color Policy Network introduces the intersectional perspective or framework, which encourages policymakers and social change leaders to identify the ways in which race, class, gender, ethnicity, sexual orientation, ability, and status influence public policy outcomes at the national, state, and local levels. In addition to describing various forms of intersectionality, the guide offers a clear roadmap for using this model to affect policy change. [[Source](#); Women of Color Policy Network, n.d.]
- 8. Putting the “D” in Diversity: Enabling Foundations, Nonprofits and Partners to Include People with Disabilities.** This RespectAbility guide begins with a description of how disability affects everyone at some point and also gives an overview of disability history. It outlines 10 specific ways to add the disability lens to your client’s existing work and provides examples of how foundations have taken this approach. [[Source](#); RespectAbility, 2019]

With these resources, you'll be better equipped to guide your clients in applying a DEI lens in their grantmaking process.

- 1. Power Moves: Your Essential Philanthropy Assessment Guide for Equity and Justice.** Are your clients seeking deeper understanding of how their power affects the communities they serve? Courtesy of the National Committee for Responsive Philanthropy, the self-assessment resources provided in Power Moves are designed to help grantmakers achieve more equitable outcomes. Each of the three sections – Building Power, Sharing Power, and Wielding Power – includes discussion guides, suggested next steps, and additional resources. [Source; National Committee for Responsive Philanthropy, 2018]
- 2. Gender Transformative Philanthropy.** Resources in this GrantCraft guide will help you support clients who want to achieve social change by funding gender equity projects. Concrete examples of opportunities to employ gender equity and address gender norms are included, as is a discussion of challenges and solutions to this approach, presented in a Q&A format. The guide – authored by TrueChild's executive director, Riki Wilchins – also includes a list of 10 steps for your clients to use in applying a gender lens to their grantmaking process. [Source; Candid, 2012]
- 3. A Guide to Funding Disabilities and Special Needs.** With both comprehensive background material and practical strategies, this guide from the Jewish Funders Network takes an in-depth look at how funders can include

individuals and families with disabilities in their work. Sections cover federal policy, legal rights, early childhood education, special education, transitions to post-secondary education and adulthood, employment, aging, healthcare, and much more. Though written with an eye toward Jewish philanthropy, the guide is broadly applicable to any organization and an important resource for your clients. [Source; Jewish Funders Network, 2012]

- 4. Operationalizing Equity.** This report describes how The Annie E. Casey Foundation moved from “we should think about equity” to “we should become a more equitable institution ourselves, and advocate for and help implement more equitable solutions for those we serve.” With key takeaways, tools, and honest assessments, it is useful as a peer-to-peer guide for your clients in their own equity work. [Source; The Annie E. Casey Foundation, 2017]
- 5. Critical Issues Forum: Moving Forward on Racial Justice Philanthropy.** In this edition of the Critical Issues Forum journal, the Philanthropic Initiative for Racial Equity (PRE) presents reflections of activists and funders on a range of racial justice issues, taking lessons from the past two decades and identifying solutions for the future. Topics include funding at the intersection of race and gender, the leadership of people of color in transforming structural racism in the media, and case studies in how foundations are addressing the root causes of racism and disparities through grantmaking. [Source; Philanthropic Initiative for Racial Equity (PRE), 2014]

6. Grantmaking with a Racial Equity Lens. Learn directly from grantmakers as they explain why a focus on racial equity gives your clients a powerful lens for understanding and advancing their work. This guide, also from PRE in partnership with GrantCraft, offers firsthand experiences and advice that will help promote and deepen your clients' respective commitments to racial equity, both internally and in the programs they support. [[Source](#); Philanthropic Initiative for Racial Equity (PRE) and GrantCraft, 2007]

7. Supporting Inclusive Movements: Funding the Rights of Women with Disabilities. For your clients who are interested in funding at the intersection of women's rights and disability rights, this Disability Rights Fund report offers steps they can take to ensure their grantmaking is more inclusive of women with disabilities. In addition to interviews with advocates in this field, the guide includes tips from donors and women with disabilities who describe crucial elements of inclusive grantmaking. [[Source](#); Disability Rights Fund, n.d.]

8. Grant Making with a Gender Lens. Your clients can learn from their peers with this GrantCraft guide, in which grantmakers and grantees describe their experiences of using a gender lens in their work. In addition to a clear explanation of gender analysis, the guide shows how this analysis can help shape more effective programs and organizations in fields such as public health, international development, juvenile justice, and youth services. It provides three case studies

of gender analysis in action, additional tools for your clients to apply in their own grantmaking, and other practical resources. [[Source](#); GrantCraft, 2004]

9. A Screening Tool for Disability-Inclusive Grantmaking. Developed by the Disability Funders Network, this series of questions is designed to help your clients determine whether they are supportive and inclusive of people with disabilities. [[Source](#); Disability Funders Network, n.d.]

This section offers a wide range of tools to help you guide your clients in integrating DEI into their planning and evaluation work.

- 1. Racial Equity Action Plans: A How-To Manual.** Intended for use by local governments but widely applicable to other sectors, this Race Forward manual guides you in helping your clients develop and implement their own racial equity action plans. You'll find tools for conducting research and information-gathering that support the action plan, as well as advice for goal setting, community engagement, and evaluation. [[Source](#); Government Alliance on Race & Equity, 2016]
- 2. Considerations for Conducting Evaluation Using a Culturally Responsive/Racial Equity Lens.** Use this guide from Public Policy Associates to help your clients develop a practical way to examine their own backgrounds, beliefs, and biases and thereby improve their capability of conducting evaluation using a culturally responsive and racial equity lens. You'll also learn how to create designs and protocols that produce evaluation questions capable of teasing out nuances that are often overlooked by common evaluation processes, as well as how to assess an organization's commitment to issues of diversity, equity, and inclusion. Also check out its [Template for Analyzing Philanthropic Programs Through a Culturally Responsive and Racial Equity Lens](#). [[Source](#); Public Policy Associates Inc, 2015]
- 3. Raising the Bar – Integrating Cultural Competence and Equity: Equitable Evaluation.** This article by

lead authors from Luminare Group (formerly jdcPartnerships) explores how philanthropy can use equitable evaluation within the context of principles in the American Evaluation Association's (AEA) Statement on Cultural Competence. It reviews the concept of equitable evaluation and outlines ways to build organizational capacity for that approach. You'll also learn how to help your clients apply equitable-evaluation capacity building to their philanthropy work. [[Source](#); The Foundation Review, 2014]

- 4. Dismantling Structural Racism: A Racial Equity Theory of Change.** Consider this a mini-tutorial – for yourself or your clients – in how to identify and change specific racial outcomes in different contexts. Using a step-by-step process, this resource from The Aspen Institute's Roundtable on Community Change describes how to assist community leaders in unpacking the root causes and dynamics of structural racism, as well as how to help them begin thinking about action strategies likely to dismantle structural racism and to promote racial equity. [[Source](#); Aspen Institute, n.d.]
- 5. The Step-By-Step Guide to Evaluation: How to Become Savvy Evaluation Consumers.** This guide, developed by the W.K. Kellogg Foundation, is primarily seen as a resource for nonprofit directors and staff, but it offers helpful evaluation tips for philanthropy consultants as well. A standout is its focus on the importance of racial equity and community engagement as cornerstones of the evaluation process. [[Source](#); W.K. Kellogg Foundation, 2017]

This set of resources will help you support your client's efforts to develop DEI-based leadership skills and culture.

1. Paying Attention to White Culture & Privilege: A Missing Link to Advancing Racial Equity.

This article is valuable when working with grantmakers on a journey toward racial equity, and it explains how you can help your clients shine a light on white privilege and white culture both internally and externally. Authors Gita Gulati-Partee and Maggie Potapchuk present four tools for tackling the challenges of white culture and privilege: 1) creating intentional group norms, 2) exploring accumulated racial advantages and disadvantages, 3) reflecting on white culture, and 4) caucusing by racial identity. [[Source](#); The Foundation Review, 2014]

2. The State of Change: An Analysis of Women and People of Color in the Philanthropic Sector.

This report from the Council on Foundations examines the demographics of the philanthropic sector, focusing specifically on the representation of women and people of color employed as full-time staff at both the leadership and overall staff levels. In addition to highlighting results and drawing conclusions from the data, the report includes a discussion guide that you can use to facilitate dialogues with your clients – foundation leaders, board members, and staff. [[Source](#); Council on Foundation, n.d.]

3. Building on a Better Foundation: A Toolkit for Creating an Inclusive Grantmaking Organization. This nuts-and-bolts guide from D5 Coalition

begins by identifying four distinct roles played by grantmaking organizations: funder, employer, community citizen, and economic entity. For each of these roles, you'll find examples of how grantmakers can successfully build an inclusive organization, as well as simple action steps to help guide your client in becoming a more inclusive organization. On a practical level, the guide gives contact information for the grantmakers featured in these examples and a list of additional resources. [[Source](#); Donors Forum of Chicago, Minnesota Council on Foundations, Northern California Grantmakers, New York Regional Association of Grantmakers, n.d.]

4. Leading by Example: Diversity, Inclusion, and Equity in Community Foundations.

If you're unfamiliar with one of the first initiatives to support the DEI work of community foundations – or simply need some great tools to consider how your clients could approach new work – then this report from CFLeads (formerly Coalition of Community Foundations for Youth) is a terrific, albeit older, resource. In addition to discussing what it takes to organize a strategic alignment process on DEI issues, it also looks at specific departmental activities, focusing on opportunities and challenges in donor development, grantmaking, community leadership, and business practices. The report describes key lessons, stories of change within foundations, and individual perspectives from CEOs, trustees, and staff about the work they did as part of the process. [[Source](#); Coalition of Community Foundations for Youth and California Tomorrow, n.d.]

ORGANIZATIONAL CULTURE & LEADERSHIP

5. A Call to Action: Trustee Advocacy to Advance Opportunity for Black Communities in Philanthropy. Part rallying cry, part action plan, this ABFE report advocates for increasing the representation of black leadership among foundations' staff, vendors, consultants, and grantees. Beyond advocacy, it recommends specific strategies for your clients to create opportunities for black professionals to lead and to build a pipeline of talent for the organization. The report also identifies opportunities for black professional services and vendors to do business with the philanthropic sector, as well as ways to expand foundation funding in black communities. [[Source](#); ABFE, 2016]

6. The Exit Interview: Perceptions on Why Black Professionals Leave Grantmaking Institutions. This publication, also from ABFE: A Philanthropic Partnership for Black Communities, shares insights on why black philanthropic professionals leave foundations, even as the philanthropic sector is celebrating the uptick in people of color in leadership at major foundations. Developed in partnership with LM Strategies Consulting, it's a resource to share with your clients as they work to consider retention strategies and understand how to build an organizational culture that supports diverse leaders. [[Source](#); ABFE, 2014]

7. The Philanthropic Closet: LGBTQ People in Philanthropy. This special report from Funders for LGBTQ Issues reviews findings on sexual orientation and gender identity from the inaugural Diversity Among Philanthropic

Professionals (DAPP) Survey, a first-of-its-kind pilot study. The data and analysis provide support for organizations that want to embrace LGBTQ people on their staff and to be more LGBTQ-inclusive in their grantmaking process. [[Source](#); Funders for LGBTQ Issues, 2018]

8. AWAKE to WOKE to WORK: Building a Race Equity Culture. Designed as a reference tool in building capacity to advance race equity, this ProInspire publication provides resources and strategies to help move an organization from commitment to action. It describes how to effectively leverage seven strategic elements that are necessary in building a race equity culture, including senior leadership, board members, the community, metrics, and investment in staff capacity. [[Source](#); ProInspire, 2018]

9. Diversity in Action: A BoardSource Toolkit. This resource will help you guide your client's board to increase its diversity and adopt inclusive policies and practices. It provides case studies, sample policies and other materials that will create the culture needed to sustain the organization's long-term commitment to DEI. [[Source](#); BoardSource, 2011]

This collection of resources directs you to underlying research for a deeper understanding of DEI work in a variety of contexts.

1. **Giving to Women and Girls: Who Gives, and Why?** This comprehensive report, published by the Women's Philanthropy Institute at Indiana University, will ground you in research about what motivates donors to support women's and girls' causes, including domestic violence organizations, women's centers, and LGBTQ+ projects. Barriers to giving are also identified, with suggestions for how your clients might use this research to support their work – whether they be individual donors, foundations, nonprofit organizations, fundraisers, or wealth managers. [[Source](#); Lilly Family School of Philanthropy IUPUI, 2016]
2. **Foundation Funding for U.S. Trans Communities.** Presented as an infographic that makes research more easily accessible for your clients, this data from Funders for LGBTQ Issues highlights the needs of the more than 1 million trans people in the United States. It also assesses the current scale and scope of funding for trans issues, noting that for every \$100 awarded by U.S. foundations, only 3 cents benefits trans communities. [[Source](#); Funders for LGBTQ Issues, 2018]
3. **TRANSformational Impact: Funders for LGBTQ Issues – Special Report.** This publication examines funding for transgender communities by U.S. foundations between 2011 and 2013, including funding specifically targeted to transgender girls and women, transgender boys and men, and gender non-conforming and genderqueer people. The report summarizes disparities for transgender people in healthcare, economics, safety, and civil rights. Separate sections are devoted to funding for trans issues in the U.S. and funding for trans issues globally, with an additional section on funding for intersex projects. [[Source](#); Funders for LGBTQ Issues, 2015]
4. **Reclaiming Native Truth – Compilation of All Research.** Do your clients need help understanding what Americans think about Native Americans and the issues that affect that population? This in-depth research from First Nations Development Institute analyzes perceptions across socioeconomic, racial, geographic, gender, political, and generational cohorts. You'll also learn what types of messages can begin to shift public perception about the reality and needs of Native Americans. [[Source](#); Reclaiming Native Truth, 2018]
5. **The Apparitional Donor: Understanding and Engaging High Net Worth Donors of Color.** This original landscape analysis, developed by the Donors of Color Network, shares priorities for high net worth (HNW) people of color and outlines a set of recommendations that can be of value to your clients, especially community foundations and others, hoping to partner with and engage donors of color. [[Source](#); Donors of Color Network, 2017]

You can tap these resources to help your clients develop effective mechanisms that engage grantees and community partners.

1. **Power Moves.** With this self-assessment toolkit, compiled by the National Committee for Responsive Philanthropy, you can work with your clients to determine how well they are building, sharing, and wielding power and identify ways to transform their programs and operations for lasting, equitable impact. It includes ready-to-use guides and comprehensive resources to achieve high-impact giving. [[Source](#); National Committee for Responsive Philanthropy, n.d.]
2. **Facilitation Guide for Community Engagement.** Created by Asian Americans/Pacific Islanders in Philanthropy, this guide provides a step-by-step process for helping your clients build effective community engagement, with the goal of moving toward a more just and equitable society. It describes how to prepare for a community dialogue, gives tips to facilitate conversations, suggests how to synthesize and analyze those exchanges, and includes a variety of facilitation exercises. [[Source](#); Asian Americans/Pacific Islanders in Philanthropy, 2007]
3. **Principles for Equitable and Inclusive Civic Engagement.** This Kirwan Institute resource explores six principles that your clients can use to engage communities: Embracing the gifts of diversity; realizing the role of race, power, and injustice; invitation and listening; trust-building and commitment; honoring dissent and embracing protest; and adaptability to community change. The guide describes challenges of equitable civic engagement, using case studies to highlight these issues. [[Source](#); Kirwan Institute, n.d.]
4. **Deciding Together: Shifting Power and Resources through Participatory Grantmaking.** This GrantCraft resource will help your clients examine how other funders are engaging in participatory grantmaking and shifting decision-making power to the communities impacted by funding decisions. Using examples and insights from a diverse range of participatory grantmakers, the guide explores the benefits, challenges, and models of participatory grantmaking. [[Source](#); GrantCraft, 2018]
5. **Turning Over Every Rock in the Outreach Process.** This Justice Funders article describes the Akonadi Foundation's journey to incorporate outreach practices that not only attract well-suited applicants but also draw hard-to-reach applicants into the process. Use the piece to show your clients how funders can uncover groups doing important work that may not have surfaced in a typical outreach process. [[Source](#); Akonadi Foundation, 2017]
6. **Cultures of Giving: Energizing and Expanding Philanthropy By and For Communities of Color.** This report shares the W.K. Kellogg Foundation's journey – its successes and mistakes – in supporting and expanding philanthropy by and for communities of color, giving your clients a case study in how to implement this approach. Using grantee profiles to illustrate the challenges and benefits, the publication describes a pilot grantmaking and field-building strategy known as Cultures of Giving, an effort to seed and grow a community of practice among leaders in the field. [[Source](#); WK Kellogg Foundation, 2012]

Perspectives from the Field

- [Gita Gulati-Partee](#)
- [Marcus Littles](#)
- [Jennifer Laszlo Mizrahi](#)
- [Stephanie Clohesy](#)
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- [Leticia Alcántar and Pat Krackov](#)



In the fifteen years since launching her national consulting practice, Gita Gulati-Partee has encountered many attributes of white dominant culture. Some are obvious within a client's

organization, but most are difficult to see and understand – even in the context of racial equity work.

One such attribute involves being driven by the calendar or clock rather than prioritizing relationships and processes that enable lasting results. Here's another example: trying to contain everything to technical work rather than leaning into the adaptive change required for and by equity. Usually, these attributes arise out of habit and can be renegotiated as a client builds self-awareness and understanding about the change process.

Then there's one damaging attribute that many people actually advocate *for*: Perfectionism.

"There seems to be a very successful marketing campaign behind perfectionism," Gulati-Partee laughs. Why? It might be because perfectionism gets conflated with and masked by positive attributes, like striving for excellence or having a strong work ethic.

Perfectionism is especially insidious, allowing people to assume there's only one "right way." They then use that assumption to judge others against an unnamed, assumed universal standard.

But Gulati-Partee wants to be clear: "Perfectionism is truly at the heart of white dominant culture."

If perfectionism isn't called out, it can become ingrained in an organization's culture – even in its racial equity work, starting with the setting of group norms.

In working with clients, Gulati-Partee typically introduces a set of norms as a jumping-off point for discussion. She notes that they reflect adaptive capacities and behaviors, not a rigid, technical checklist. More importantly, she adds, these suggested norms "aid in piercing the myth of perfectionism." They are:

- Speak your truth.
- Lean into discomfort and lean into each other.
- Commit to non-closure.
- Embrace paradox.
- Focus on learning and responsibility, not perfection.

A self-described practical visionary and tempered radical, Gulati-Partee embraces the role of disruptor. She views her work as inherently disruptive, because consultants must be prepared to address white dominant culture "even when it's not the actual ask of the engagement."

Gulati-Partee believes that building skills and tolerance for disruption is an important, ongoing process. Racial equity is "really juicy and complicated" work, she notes, and no consultant can claim to have all the answers. "We're sojourners with everyone else."

MARCUS LITTLES
Frontline Solutions



Marcus Littles doesn't view himself as a DEI consultant. Why? Because *all* of the work of his firm, Frontline Solutions, seeks to explicitly apply an equity

lens in helping clients become more effective organizations.

Sometimes they are invited through the front door when a client explicitly asks for help with DEI work. Even when there's no explicit request, though, Littles doesn't decouple equity from other organizational development consulting. "If the Baltimore Symphony calls and asks us to do a strategic plan, that for us is an equity engagement."

Yet as the issue of equity gains more attention in the field, more clients are viewing it as a crucial element of their work. Littles points to an example of a funder collaborative that brought him on board to help understand and operationalize racial equity in their grantmaking and culture. The work entailed building a consensus understanding of the gaps of culture, values, practices, and policies that were barriers to the organization in making a programmatic commitment to racial equity. Littles faced the challenge of developing a clear understanding with leadership about how much work that transformation required.

Culture change takes time, Littles notes, and it requires difficult discussions to create an authentic relationship around race, power and privilege.

Being authentic is a core value for Littles, who believes in sharing his own vulnerability.

"Tell the unflattering parts of your story and the hard stuff that was required to make progress and to live into your equity values."

Don't present yourself as born enlightened or "woke," he adds. Rather, use your own life experiences, insights, and struggles when working with clients, in addition to research and best practices. He has written about this approach in detail in "[Equity Lessons for Organizational Leaders](#)" and lives it out as Frontline Solutions works through what it means to be a black-centered consultancy.

Beyond that, Littles feels strongly about respecting and building on the foundation of groundbreaking work done by [Lori Villarosa](#), [John A. Powell](#), [Linetta Gilbert](#) and other philanthropy experts who were applying an equity lens long before it was mainstream.

There's certainly a need for new approaches, Littles says, pointing to an equity footprint tool that his firm is developing. But it's equally important to lift up and learn from the work that has already been done and to highlight its value to the field.

JENNIFER LASZLO MIZRAHI

RespectAbility



Personal experience and frustration compelled Jennifer Laszlo Mizrahi to become a full-time disability activist, blending that role with her work as a well-respected consultant to the nonprofit and

philanthropic sectors. A core part of that work is helping foundations assess their inclusion status and learn how to change their processes holistically, building their capacity to become more inclusive.

Her journey began nearly twenty years ago, when Mizrahi and her husband started their own donor-advised fund. “As parents, we discovered that even groups we funded were not welcoming, respectful, or even open to our beloved child with disabilities,” she recalls. “Doors were slammed in our faces.”

If Mizrahi, as a person of privilege, could not get people to treat her child as an equal human being, she wondered what was happening to children of color, immigrants, or other less privileged people with disabilities. How did people in single-parent households, or with little formal education, find the resources that they and their children need to succeed?

That experience led her to co-found [RespectAbility, which fights stigmas and advances opportunities for people with disabilities. The nonprofit offers free tools and trainings](#) to organizations and individuals who want to learn about disability inclusion.

Mizrahi is well-known for her consulting work on disability inclusion with a wide variety

of organizations in the philanthropic field, including major international foundations, multiple synagogues, community foundations, and other large funders. She is a frequent speaker about best practices in disability inclusion and is completing a study of nearly 1,000 people from the philanthropic and nonprofit sectors, assessing their disability inclusion status and work.

As a specific example of RespectAbility’s work, Mizrahi describes guiding a Jewish federation to use disability inclusion to recruit hundreds of volunteers and expand their fundraising and impact.

The federation originally had been funding a large number of nonprofits that provided services in which people with disabilities could not participate. Today – due to intentionality, goodwill, and hard work to embrace disability inclusion – children with a wide variety of disabilities can go to Jewish religious schools and camps. Adults with disabilities can fully participate in many synagogues, social action programs, good deeds days, and all other activities. This has dramatically expanded participation overall, since people with disabilities have loved ones who also want to go to events where everyone is welcome and included.

Now, the federation even employs a full-time professional to help every agency it funds be inclusive of people with disabilities. “It’s the gold standard,” Mizrahi says.

Mizrahi explains that although there is some cost to inclusion – because modifications and services must be put in place – the changes can result in a significant boost to fundraising. That’s partially because people of all abilities, and their families, are welcomed and respected.

It takes time to get people to realize that disability inclusion is much easier and less expensive than they expected, Mizrahi notes. Implicit bias can be a major roadblock in making this kind of transformation.

Some people wrongly think that including people with disabilities will be a drag on an organization. In fact, they find that the focus brings new energy, innovation, and participation. This includes energy from people with invisible disabilities such as mental health or chronic pain, who are often marginalized but have a lot to contribute.

Mizrahi also has disabilities – ADHD and dyslexia – and while fully 1 in 5 people live with some form of disability, she cautions against expecting overnight change when doing diversity, equity, and inclusion work.

“DEI work is not like an on-off light switch,” she says. “It is more like a dimmer switch that you push up day after day and month after month.”

STEPHANIE CLOHESY

Clohesy Consulting



Stephanie Clohesy isn't afraid to push clients beyond their comfort zone. That's a crucial role for philanthropy consultants, she says, especially when working on human

rights, social justice, and other complex issues intersecting with gender and race.

Her work with a women's foundation in the Midwest provides a clear example. She recently helped the foundation create a bold new strategic plan that included leaps in both financial growth and higher impact. Clohesy began by working with the foundation's staff and board to look more carefully at data and insights about women's economic self-sufficiency that the foundation had collected in 19 communities. Most communities had cited a lack of employment opportunities as the main challenge to self-sufficiency, even though there seemed to be plenty of jobs and qualified women who were willing to work.

With Clohesy's guidance, staff met with the communities to go deeper into root causes of economic self-sufficiency and to begin planning action strategies. On deeper reflection, many communities identified childcare as a primary root cause. When women can't afford or find reliable childcare, it hampers their ability to enter the workforce at all and/or to avoid underemployment. These new community insights changed the foundation's strategies. The foundation decided to enter into deeper partnerships with community leaders and to create a new field-of-interest fund to support emerging childcare initiatives.

This isn't simply a women's issue, Clohesy notes, "but if you don't look at it through a gender lens, you don't necessarily catch it."

Gender, race, ethnicity – all things that can put people at a disadvantage – have to become an explicit part of analysis and strategy for consultants and their clients. "Until we get more explicit, we can't come up with the best solutions," Clohesy says. "We need to educate consultants so that philanthropy and grantmaking can also change."

Guiding change through a DEI lens is another important role for philanthropy consultants, according to Clohesy – an effort that might include navigating roadblocks along the way.

Clohesy helped guide the second generation of a small family foundation in the Southwest as they developed an initiative on women's rights and human rights. The new leaders wanted the foundation's investments to better reflect the intersectional realities of women's lives, including issues of race, gender, and class. To do that, they proposed awarding a research grant to a leading race equity organization, with an eye toward building a program focused on the intersection of gender and race in the United States.

When the foundation's board questioned the proposal, Clohesy helped the team regroup, guiding their discussions, listening and interpreting their vision, and facilitating their ideas from concept to concrete program. Through that work, what started out as a grantmaking effort transformed into a strong partnership that also included the support and development of a race/gender coalition

STEPHANIE CLOHESY

Clohesy Consulting

in the foundation's hometown. "A working partnership ended up being as powerful – or more powerful, in terms of their own sense of change – than making a grant," Clohesy explains.

Clohesy's guidance and counsel helped the foundation define its work at the intersection of gender and race, especially in support of women's rights. "In some ways, it was almost inevitable that if you're going to work honestly on women's rights issues, you're going to have to explicitly look at the interplay of issues," she says.

Through strategic planning and visioning, the foundation was able to integrate a focus on race in its work on gender and women's rights while staying true to its core mission.



Social justice-oriented funders have been increasingly willing to address issues of race and class, and embracing the idea that an “intersectional” approach to racial justice needs to look beyond race itself.

Author and consultant Riki Wilchins believes that philanthropic organizations can – and must – go further, starting with rigid gender norms. Yet most funders overlook gender, or think of it as solely an issue for gay and trans communities.

On the contrary, decades of research have established that rigid ideas of masculinity and femininity limit everyone. Boys who think that manhood is defined by qualities like strength, aggression, and emotional toughness and girls who prioritize the “three Ds” of traditional femininity – being Deferential, Dependent, and Desirable – tend to have lower life outcomes in a cluster of related areas that include basic and reproductive health, education, intimate relationships, and economic empowerment.

Belief in such norms, Riki says, is dangerous. “Studies show these beliefs are connected to higher rates of violence and suicide, ‘push-outs,’ and contact with juvenile justice and law enforcement systems. Moreover, many of the individuals within complex systems – law, health, education, JJ – have themselves internalized and model very traditional, even regressive ideas of womanhood or manhood.”

Only by incorporating an intersectional approach that combines factors like race,

class, AND gender will philanthropic institutions have a richer understanding of the complex, multi-faceted social problems they seek to address.

For instance, a 2013 World Bank study found that addressing the negative impact of narrow gender norms was crucial to improving equity for women and girls, as important as funding, programs, and opportunity.

In an ever-evolving world, understanding gender and its impact can be difficult. With decades of experience, Wilchins has made it a mission to help philanthropies narrow and eventually close that knowledge gap. As Executive Director of the nonprofit TrueChild, Wilchins has seen firsthand the impact of examining the world through the added lens of gender.

As funder Loren Harris has noted: “Gender impacts every issue funders work on. But grantees and program officers aren’t challenged to do innovative work around gender like they are for race and class.” That’s where TrueChild comes in. According to Wilchins, “we need to begin addressing how the contours of opportunity and inequality remain overly-determined by hierarchies of race, class, AND gender.”

Below, Wilchins shares four ways an organization can incorporate gender into intersectionality.

1. Learning to see through a new lens often begins with **Gender Training**. “With a shared vocabulary and an understanding of the impact of the limitations of narrow gender roles, an organization will be prepared to address internal and external bias,” Wilchins says.

2. Conduct **Gender Audits** to help funders and their grantees incorporate the gender lens into all of their published material—from online publications to employee handbooks. According to Wilchins, “not only does this demonstrate an organization’s intent to expand gender roles, it clearly communicates its culture to employees, grantees, donors, and the public at large.”
3. Provide **Curriculum Development** that demonstrates the limitations of narrow gender roles to people of all ages.
4. Employ **Model Toolkits**, online trainings, and self-evaluation surveys to help grantees really integrate gender norms throughout their analysis and incorporate it into their organizational “DNA.”

Riki Wilchins is the author of six books, including the newly published book for funders: [Gender Norms and Intersectionality: Connecting Race, Class and Gender.](#)

KRIS PUTNAM-WALKERLY

Putnam Consulting Group



The current buzz around equity “is both a blessing and a curse,” says Kris Putnam-Walkerly – a blessing because people are increasingly aware of the issue, but a challenge when they don’t really know what it means.

That tension was clear when Putnam-Walkerly began working with the CEO of a foundation who wanted to make sure the organization addressed the issue of equity. But within five minutes of their conversation, the CEO suggested they were already doing equity work – by funding low-income residents – and didn’t need to do more.

“It was a good reminder that funders often don’t immediately recognize the importance of walking the talk on this issue and of applying that equity lens internally within their own foundation,” Putnam-Walkerly says. “It’s so easy to jump into ‘Let’s make a grant!’”

Putnam-Walkerly was hired to work with the foundation’s staff and board to help them understand what it means to integrate equity into their operations. She started by having the board look at what other foundations were doing. That was an easy point of entry, she notes, because she wasn’t forcing the board into an uncomfortable conversation about race, privilege, and implicit bias as a starting point.

Benchmarking their foundation in this way provided a “safe zone,” Putnam-Walkerly observes, and allowed the board and staff to learn how other foundations approach this work. As a result, the board decided to incorporate equity into their strategic-planning

process. Putnam-Walkerly then helped the grantmaker understand the difference between diversity, equity, and inclusion. She also guided the board and staff to define what they mean by “equity.”

Why focus on a definition? Because it’s virtually impossible to make a change if board members and staff can’t agree on what they’re trying to do. “And it’s ok if you don’t know what equity means,” Putnam-Walkerly adds, “because, in some cases, other foundations don’t either.” Much like the term innovation, equity is “one of those words that everyone understands and few can describe or define.”

Providing concrete examples is an effective way to help understand how equity can be integrated into an organization, Putnam-Walkerly says. What does equity mean for the human resources staff? How can the grants-management team incorporate equity into their work?

Throughout this process, it’s vital that the CEO is committed to making equity part of the foundation’s internal operations. Like any cultural change, “if the leadership isn’t championing it, it doesn’t go anywhere.”

Putnam-Walkerly believes foundations should apply an equity lens internally so they’ll be able to support more equitable work in whatever they’re funding, such as healthcare, access to education, or other social needs.

As consultants work with clients to tackle these challenges, they don’t need to be DEI experts to help their clients integrate an equity lens into their core mission in a meaningful way, Putnam-Walkerly says. “Take time to educate yourself,” she advises, but also recognize when you need to bring in someone with more experience.



With years of experience in philanthropy that included DEI work, Catherine Hyde Townsend has now turned her attention to consulting. Hired as a consultant by a major private foundation in 2017, Catherine’s

original focus was inclusive grantmaking and learning about disability rights and justice. These were both great initial steps, Catherine says, but as the work evolved Catherine and her client recognized the integral part that DEI would play to complement and reinforce the disability grantmaking.

Yet in order to move forward, Catherine quickly realized that the institution needed to create a common base of learning, establishing disability as a civil rights issue, identifying disabled people as a powerful community to partner with (not just a “target” community), and clearly defining disability. The foundation also wanted to ensure shared cultural competency around language and interaction with diverse people with disabilities. They needed to examine the structural changes needed to advance DEI throughout all levels of the organization.

Like her client, all philanthropies are in the unique position of helping to reframe the cultural view of disability from a deficit with pejorative medical frames to a welcome and celebrated part of a person’s identity. In fact, Catherine believes that cultural change is the first and most important step in this process.

Here, Catherine shares key steps a foundation can take to address DEI in its organization:

1. Make a public, intentional commitment to disability inclusion within DEI.
2. Initiate proactive cultural changes to address ableism
 - Commit to hiring, mentoring and retaining people with disabilities at all levels of staff.
 - Provide cultural competency training to educate staff on the diversity of disability – invisible and visible disabilities.
 - Commit to open, honest, judgement-free discussions in which no question is stupid.
 - Educate staff using a variety of approaches, taking into account different learning styles and previous levels of exposure.
 - Ensure all materials, from onboarding documents to agreements with vendors, address disability rights and justice.
 - Provide the opportunity and supportive environment for employees to self-identify as disabled and develop a reasonable accommodations policy.
 - Demonstrate to existing staff how DEI enhances their current work.
3. Hold the organization and those with which it works to account:
 - Invite everyone within the organization at all levels, in either the program or operations side, to be engaged in the work of disability inclusion.
 - Demonstrate how you value employee contributions, no matter how small.
 - Examine venues and systems: while public commitments are important, systematic changes must also be made within to ensure not only accessibility but welcoming inclusion.
 - Require and support grantees to strengthen their own commitment to disability inclusion.

CATHERINE HYDE TOWNSEND

4. Situate the efforts within existing DEI and social justice efforts: Take advantage of the knowledge of staff engaged in addressing race or gender, acknowledging intersecting forms of oppression.

Catherine recognizes the difficulties inherent in any cultural change. This is especially difficult with DEI, as foundations are trying to change the culture while simultaneously recruiting staff with expertise in disability. But building DEI into the culture and structure of an organization, indeed celebrating disability, is worth the effort. It recognizes the value and dignity in every individual within the workplace. It allows people who have not previously self-identified as disabled to bring their whole selves to work. It attracts more people with disabilities to the workplace to make our work better. Ultimately, welcoming and celebrating disability in the workplace leads to happier and more fulfilled, more productive staff and reinforces and supports an organization's overall approach to DEI.



When David Maurrasse was hired by a national foundation in 2002 to scan the work of various foundations related to their racial equity policies and practices, it looked like a straightforward, one-off consulting engagement.

More than a decade later, his consultancy – Marga Inc. – continues to manage an outgrowth of that initial project: a funders’ group focused on race and equity in philanthropy, a major initiative that’s poised to grow even more.

The lesson? “We really never know where our projects are going to lead,” Maurrasse says, so from a consulting perspective, “we have to be open.”

The funders’ group is a learning community that brings together foundation representatives to discuss policies and practices related to racial equity and other aspects of DEI. When the group was created in 2006, “DEI” wasn’t even a term frequently used in the field, Maurrasse notes.

As he conducted that initial scan, it became clear that foundation staff members were eager to learn from what others were doing and to share their own experiences. So, structuring a permanent group focused on peer learning made sense. It made sense partly because peer learning is a major way in which foundations learn, and a DEI consultant can facilitate that process by exposing staff to case studies or establishing spaces for direct learning exchange. This insight developed into a crucial pathway to transforming individual foundations in their commitment to DEI work.

Today, one of the biggest challenges is to maintain a rewarding and impactful experience

for the foundations involved with the learning community, while also providing avenues to influence conversations about these issues in the broader philanthropic field.

The funders’ group has expanded its reach with webinars, publications, and presentations at conferences, but Maurrasse is constantly looking for other ways to scale their work in a way that maintains its valuable attributes. “That’s a part of our ongoing challenge: How do we bring something to scale that is by design intimate?”

Maurrasse is working to multiply the number of learning exchanges by developing a framework that can be applied in a variety of settings. The outcome is an agenda that leads people through a process of exchanging ideas, policies, and practices with each other on DEI issues. It gives them the tools, ideas, lessons, experiences, and practices that they can take back to their foundations to either start conversations or help better facilitate existing conversations about organizational change.

At this point, Maurrasse’s work with the group goes well beyond a consulting project, he says. It’s a case study in how any singular consulting project can transform into a much broader initiative. And it was the recognition of the need for ongoing learning that helped catalyze this development. Thus, in thinking about the kind of roles that philanthropy consultants play, he says, “we have to continually prepare ourselves to be able to take on a range of roles.”

“The reality of being a philanthropy consultant is that we could be asked to do any range of projects,” Maurrasse adds, as reflected in his experience. To be prepared for that, “we have to constantly build our portfolio of competencies to be able to take on different types of structures and initiatives.”

LETICIA ALCÁNTAR AND PAT KRACKOV

Lighthouse Philanthropy



After working as independent consultants for several years, Leticia Alcántar and Pat Krackov joined forces in 2014 to leverage their strengths and build a collaborative consulting practice.

The two share a belief in the importance of carrying out their work through a racial equity lens. They seek to apply that lens to their own internal practices, such as hiring sub-contractors. Alcántar in particular views everything she does – from due diligence on a docket to capacity-building research – through a racial equity framework.

Despite their varied background – or perhaps because of it – they both stress the need to constantly check their own internal culture and practices, and they urge other consultants to do the same. How does your consultancy practice DEI internally? Do you have a shared language, values, communications, and culture?

Attending to these issues complemented their work on a racial equity audit they conducted for a national membership organization of arts and culture funders. Their client wanted to “walk its talk” by undergoing an audit internally for hiring practices and human resource policies, as well as externally for member programs and board composition.

The goal was to set benchmarks and long-term plans to operationalize the organization’s commitment to racial equity.

As consultants, the biggest challenge that Alcántar and Krackov faced in this project was trying to understand the internal dynamics of their client’s small organization and whether the organizational practices they saw were reflective of a racial equity issue or were primarily about management style.

Ultimately, Alcántar and Krackov provided staff and board members with a basic roadmap for making concrete and doable changes that would move both the organization and the field forward to advance racial equity, while maintaining the collaboration and cohesion of key stakeholders. Their final report included recommendations for embedding new inclusive policies and practices into the organization’s culture and into all functional areas, including achievable short-term action steps and sustainable, long-term goals.

In reflecting on their work, Alcántar and Krackov highlight the importance of tapping resources that have been around for as long as a decade, noting that much of what’s been published in the past is still very relevant today. At the same time, some of the information is dated and hasn’t always captured the newest research and thinking about racial equity.

They also emphasize the need for racial equity to be at the center of their consulting. While they approach DEI through an intersectional framework, they believe it’s important – even necessary – to lead with race. If you aren’t being explicit about race, that equity lens can be lost or minimized.

Highlights from NNCG's Equity Webinar Series



Gender Norms, Race & Class: An Intersectional Approach to DEI & Grantmaking

Riki Wilchins, Executive Director at TrueChild.

May 2019



Leveraging Organizational Change Practices to Advance Racial Equity in Philanthropy

Presented in partnership with the Southeastern Council of Foundations

Vicky Stott, Program Officer, W.K. Kellogg Foundation

April 2019



Sharpening Your Racial Justice Journey: Lessons from Grantmaking with a Racial Justice Lens

Lori Villarosa, Executive Director, Philanthropic Initiative for Racial Equity (PRE)

December 2018



Evaluation of Health Equity Work Means What?

Gabriela Alcalde, MPH, DrPH, Managing Director of Equity and Health, Richmond Memorial Health Foundation

Brandon Coffee-Borden, MPP, Managing Associate, Community Science

Kien Lee, PhD, Principal Associate, Community Science

October 2018



Lean into Disruption: Advancing Racial Equity Requires Challenging the Status Quo of White Culture

Gita Gulati-Partee, Founder & Chief Strategist, OpenSource Leadership Strategies

Maggie Potapchuk, Founder, MP Associates

Mary Harrison, formerly Vice President of Programs, Nellie Mae Education Foundation

September 2018



Exploring Equity Approaches in the Philanthropic Sector: Two Case Studies

Marcia Coné, Chief Strategist, Women's Funding Network

Elizabeth Whittaker-Walker, Director of Learning Services and Public Policy, Council of Michigan Foundations

June 2018



Hard Knocks of Equity Work - Seven Critical Tactics for Advancing Equity at Philanthropic Institutions

Marcus Littles, Founder and Senior Partner, Frontline Solutions

Dr. Jessica Barron, Consultant, Frontline Solutions

Ashley Simpson, Associate Consultant, Frontline Solutions

May 2018

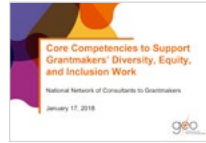


Embedding Equity in Strategic Planning: How to Leverage a Consultant's Expertise

Presented in partnership with the Southeastern Council of Foundations

Stephanie Clohesy, CEO, Clohesy Consulting
Keecha Harris, DrPH, RD, President and CEO, KHA Inc

April 2018



Core Competencies to Support Grantmakers' Diversity, Equity, and Inclusion Work

Suprotik Stotz-Ghosh, Senior Advisor, Racial Equity, Grantmakers for Effective Organizations (GEO)

Jaime Love, Program Officer for the Healthy Eating Active Living

Ashlee Young, formerly Evaluation Associate, Innovation and Learning Team, Interact for Health

January 2018



Equitable Evaluation - An Evolution

Jara Dean-Coffey, MPH, Founder and Principal, Luminare Group

March 2018

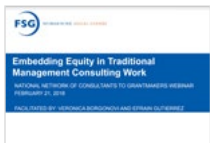


Race and Equity in Philanthropy Group: Lessons Learned

Dr. David Maurrasse, Founder and President, Marga Incorporated

James W. Head, President & Chief Executive Officer, East Bay Community Foundation

November 2017



Embedding Equity in Traditional Management Consulting Work

Veronica Borgonovi, Director, Diversity, Equity, and Inclusion (DEI)

Efrain Gutierrez, formerly Associate Director, Equity Partnerships, FSG

February 2018

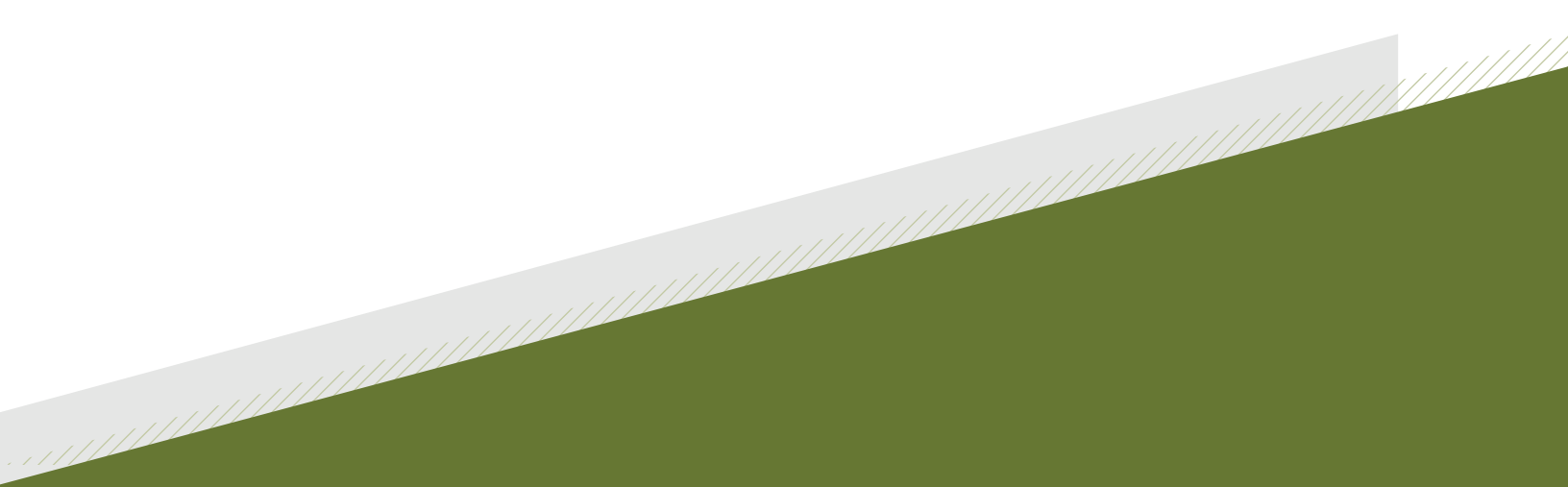


Equity: Philanthropy's New Buzz Word or the Key to Achieving Your Foundation's Mission


Kris Putnam-Walkerly, President, Putnam Consulting Group

Nonet Sykes, formerly Director of Race Equity and Inclusion, The Annie E. Casey Foundation

January 2017



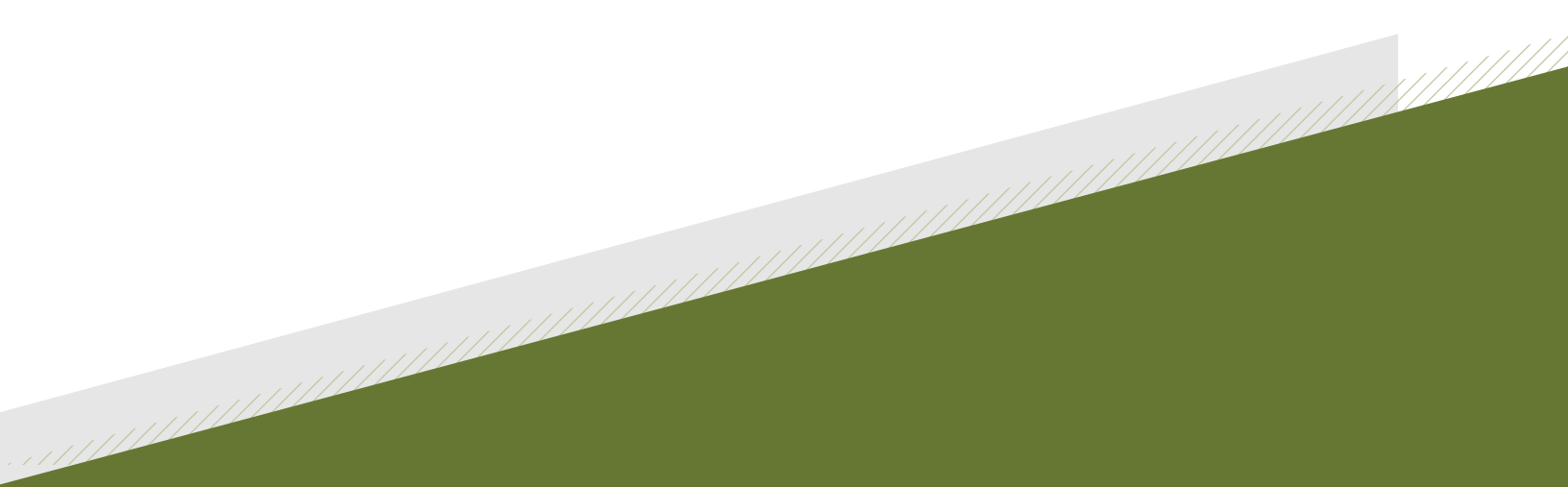
Conclusion



This toolkit won't be the last stop on your DEI journey. It's a roadmap for deepening your understanding of diversity, equity, and inclusion, with expert consultants and curated resources guiding you along the way.

Getting beyond the DEI jargon isn't easy. But once you gain that deeper knowledge, you'll know how to help your clients as they advance a philanthropic agenda in support of diversity, equity, and inclusion. Using this toolkit, with the expertise it provides from experienced practitioners, is an effective way to start achieving that goal.

To learn more about our work to support DEI in philanthropy or the leadership of consultants in our network, we encourage you to visit us at www.NNCG.org and access our [National Directory of Philanthropy Consultants](#).



About NNCG

The National Network of Consultants to Grantmakers (NNCG) is a professional membership and networking organization of best-in-industry philanthropy consultants who offer advice, strategy, and counsel to elevate and enhance the vital work of grantmakers.

NNCG's community of highly skilled consultants has deep experience in supporting philanthropy. The organization engages its members with the latest best practices, peer-to-peer learning exchanges and networking opportunities to ensure that consultants stay ahead of the curve. In addition, NNCG offers public, private, family and community foundations a reliable source of consultants. These experts are adept in partnering with foundations to fortify their philanthropic grantmaking, operations, and other aspects of their work.

Through the partnerships that NNCG builds, grantmakers have access to top-tier consultants able to magnify the value of foundations' philanthropic investments. The field of philanthropy is very specialized, and qualified partners can be hard to find. NNCG acts as a connector between foundations and specialized consultants who have the ability to advance the field of philanthropy. Philanthropy is stronger and continues to evolve because of the work of NNCG's members, who have a proven track record of making grantmakers' work more effective.

Because NNCG is in the unique position of serving both grantmakers and philanthropy consultants, the organization offers insight on issues and trends facing foundations and the consulting industry that serves them. Through NNCG, foundations and consultants collaborate on crucial work: Strengthening the impact of philanthropic giving.

Diversity, Equity, and Inclusion Task Force National Network of Consultants to Grantmakers

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NNCG would like to thank Lisa McGill and the team at LM Strategies Consulting for support with the production of this toolkit.

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