



UNITED PHILANTHROPY
FORUM

A network for the common good

**SEEDING A RACIAL
EQUITY LENS:**

**The Case Story
of Wisconsin
Philanthropy Network
(WPN)**

**Prepared by Community
Centered Evaluation and
Research**

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Acknowledgements

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Community Centered Evaluation and Research (CCER) was founded in 2018 out of a desire to center racial and economic equity in research and evaluation. Community CER is a values-driven, woman-of-color-owned social change research and evaluation consulting firm dedicated to supporting social sector organizations to achieve their greatest impact.

ABOUT THE CASE STORIES AND THEIR CONTRIBUTORS

Advancing racial equity, diversity, and inclusion (REDI) in philanthropy is a key strategic priority for the United Philanthropy Forum (Forum). Over the last few years, Forum has embedded racial equity intentionally and explicitly, both internally with the organization and externally through programming and resources to PSO members. Among the resources provided to member PSOs is the Forum's Racial Equity Organizational Self-Assessment, originally launched in 2019. The findings from the 2019 assessment helped Forum better understand how to support members along their racial equity journey, as well as provided great insights for members about their own racial equity journey and that of the sector.

To complement the learnings from the Racial Equity Organizational Self-Assessment, the Forum commissioned Community Centered Evaluation and Research (CCER) to uplift and share PSO member's racial equity learning journeys through the development of in-depth case stories. The case stories capture the wide experiences of PSOs across varying geographic regions and organizational size and breadth of focus. Four Forum PSO member organizations shared and reflected on their internal and external racial equity journey through one-on-one, in-depth interviews conducted with various staff members. The PSO member organizations that participated in the case stories are listed below, along with the key staff that contributed their time and perspectives.

ABOUT THE FORUM

As the largest and most diverse network in American philanthropy, United Philanthropy Forum holds a unique position in the social sector to help increase philanthropy's impact in communities across the country. We are a membership network of nearly 100 regional and national philanthropy-serving organizations (PSOs), representing more than 7,000 funders, who work to make philanthropy better. The Forum envisions a courageous philanthropic sector that catalyzes a just and equitable society where all can participate and prosper.

The Forum has created a new kind of philanthropic network that brings together regional PSOs' deep regional roots and connections with national PSOs' deep content knowledge and reach. Given our network's scale and scope, we can lead change and increase impact in philanthropy in a deeper and broader way than any other organization in our field.

To learn more about Forum membership, please visit: www.unitedphilforum.org/join.

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About This Case Story

The story of Wisconsin Philanthropy Network's racial equity journey highlights the importance of creating shared language and understanding to deepen Board and member engagement in advancing racial equity strategies.

WPN is a professional membership association for grantmakers from across the state of Wisconsin representing over 130 organizational members. Founded in 1978, WPN has propelled effective philanthropy in Wisconsin and has become the premier resource for members by encouraging discussion and idea-sharing and supporting grantmakers in their efforts to be change agents for communities. Over the last 40 years, WPN has maintained and deepened its commitment to making members' giving as effective and meaningful as possible by providing networking opportunities, skill building, and customized research services tailored to members' needs. WPN's members share a commitment to promoting philanthropy, fostering collaboration, and advancing public policy; WPN promotes relationships between nonprofit providers and funders and disseminates current nonprofit sector trends and research. WPN's members include private foundations (family, independent, and corporate), corporate giving programs, community foundations, donor-advised funds, charitable trusts, and individual philanthropists. Together, WPN's members hold more than \$7 billion in assets and invest more than \$600 million annually to improve the quality of life for Wisconsin residents.

Wisconsin, like much of the world, has been radically changed and challenged by the COVID-19 pandemic. The public health crisis has disrupted economies, creating financial insecurity, increased unemployment, and bankruptcies across urban, suburban, and rural communities. Wisconsin communications have called for help with housing and shelter, health care, mental health and addictions, food security, and more. Nonprofit organizations have witnessed increased demand for services, programs, and support at the same time they are facing significant financial challenges. WPN has propelled important work to explore the role philanthropy in Wisconsin plays in responding to challenges and reimagining futures, providing critical information about statewide charitable giving, national trends, and sector specific analysis.

WPN is a small PSO consisting of four staff members and governed by twelve members/officers of the Board of Directors. In 2018, WPN had a transition in leadership to a President/CEO who identifies as a Black man. In addition, the Director of Programs from 2014 to 2022 identified as a Latinx woman, resulting in a staff member composition of over 50% people of color at the time of the interviews. This shift in leadership served as a transformative and catalytic moment to propel racial equity efforts forward at WPN, both internally and externally. In synergy with the racial justice movements of the 2020s, WPN launched new efforts to address equity, trust-based philanthropy, and impact investing. WPN also responded to members' requests for guidance and tools to help navigate philanthropic discussions with an emphasis on equitable and inclusive practices. But the groundwork had

been set before 2020 with the transition in leadership, as described by an interviewee:

“The first four [of my eight] years were with a different president, that [racial equity] was not something that was on her radar at all. Nor did she want it to be on her radar. Even when I approached it with her because that’s where my jam is, and I’m into that work, she wasn’t open to it. When [the new president] came on board, it was just a whole different dynamic in terms of the leadership, the vibe, everything. The culture changed drastically for the better. [Previously], I was the only person of color on staff.”

This experience resonates with the reflections of other PSOs as described in the Racial Equity Capacity Assessment survey, where leadership transitions helped PSOs focus and accelerate their racial equity efforts.

The following table summarizes some of the key efforts, internally and externally, that WPN has embarked on over the last four years in support of racial equity and justice. The most important internal racial equity efforts for WPN in the last four years focused on cultivating board engagement with racial equity work; and changing the organizational strategy from transactional (tools-based) to transformational (engagement-focused). Complimentarily, the most impactful external efforts WPN embarked on included participating in a national equity fellowship, enhancing and distributing a Racial Equity Resource Guide, developing shared language among coalitions, and gathering and reporting on data from the equity journey of members.

Internal Efforts

- ✓ Cultivated Board of Directors’ engagement
- ✓ Increased diversity and representation on the Board
- ✓ Prepared an equity-focused biannual conference
- ✓ Supported an internal weekly learning hour for staff
- ✓ Prioritized people of color owned vendor contracts
- ✓ Participated in ongoing conversations with other PSO program directors on internal racial equity topics
- ✓ Engaged in conversations with and gathered data about members’ racial equity journeys

External Efforts

- ✓ Participated in national equity fellowship
- ✓ Responded to members’ requests for support on racial equity questions through COVID pandemic and racial reckoning movements
- ✓ Distributed a Racial Equity Resource Guide for members
- ✓ Delivered biannual conference sessions on equity with positive success
- ✓ Helped members to share their own equity journeys with peers
- ✓ Established member Diversity, Equity, and Inclusion (DEI) roundtable
- ✓ Helped develop shared language among coalitions
- ✓ Listed salary for Director of Programs new position

JOURNEY TOWARDS RACIAL EQUITY

The impetus for WPN's racial equity work included conversations about organizational identity, historical moments of need, and tactical strategies built on relationships and trust.

Internal impetus: In 2018, WPN's leadership had a Black Executive Director and a Latinx Director of Programs for the first time in a historically and predominantly White organization. This transition in leadership provided momentum and transformative leadership to address racial equity issues, both internally within the organization and externally with members and partners. There had also been catalyzing conversations about racial equity in the field ignited by many factors, including Edgar Villanueva's written work on Decolonizing Wealth, but it was the murder of George Floyd that led to national heightened awareness of racial injustice in 2020. As a Black leader, the new Executive Director felt a sense of responsibility to engage in conversations intentionally and collaboratively. WPN had primarily been a "tools-based organization," and members began asking for resources and tools to respond to an important historical moment in the country. Around this time, WPN had participated in the first Racial Equity Capacity Assessment commissioned by United Philanthropy Forum. WPN's leadership took the findings to the Board of Directors to find support in "opening the tent" to deeply rooted issues, leading to deepened Board engagement. WPN leadership's vision was to act as change agents that transformed the PSO "from a very transactional organization to a transformational organization" while simultaneously "bringing people along," which included the board, PSO members, and staff themselves. This manifested at the board level in dedicating time to the conversation of racial equity at every meeting, which kept the focus on the topic and conveyed the importance of equity as a key focus area of WPN's work. The Board's ongoing engagement on racial equity shaping WPN's organizational vision and informing strategic planning frameworks and execution.

"I wanted to be very intentional about our equity work. I didn't want to be willy-nilly about it [or] be like, 'that's what we're gonna do and y'all go with me on this or else'. I wanted to be a collaborative, engaging leader. So, how do you do that? [You figure out], what's our baseline as a starting point..."

External leverage: The Board leadership understood the complexities of the spectrum of values and beliefs reflected on the Board of Directors. There had been conversations on the Board prior to COVID and the murder of George Floyd, but WPN also understood that there were some members of the Board and also of the membership at large who may not have had engaged in those conversations previously. WPN's leadership sought the support of Board members to create a tactical external strategy that included figuring out where to start with the work, like starting with common shared language and focusing on being responsive to members' questions. In addition, WPN convened members to share practices and questions, build community, and establish trust encouraging members to begin where they were at. This due diligence led to the development of a racial equity work plan for 2021, which enhanced WPN's work in the following areas: (1) programming and professional development, (2) member engagement, (3) community engagement, (4) statewide conference, (5) enhanced roundtables, and (6) national philanthropic trends. An example of how this work was operationalized externally was 2021 biannual conference focused on racial equity and DEI topics that "flipped the script" on what WPN's offered to members, covering topics for the first time such as economic justice and housing.

LESSONS FOR PSOS AND PHILANTHROPY

WPN's racial equity work has been an important change engagement process that takes time, requires deep conversations about transformational leadership, and ensures organic integration of equity work.

“There're only a few people of color in philanthropy. The representation is just terribly lacking. So, there're just terrible discrepancies and inequities, which we've all seen written about hundreds of times. But in philanthropy, it's still like an old boys' club. I can see some change, but it's so slow.”

Lessons for PSOs: WPN leadership, staff, and board representatives reflected on the lessons they have learned more intentionally integrating racial equity into the organizational internal practices and external programming. Some of the lessons WPN has learned that may be useful to other PSOs, especially small PSOs, regional PSOs, and/or PSOs who may find themselves earlier in their journey, include:

- ✓ Start the work from where you are, whatever your baseline is. It's important to get a sense of where the PSO is situated in its journey and use that information and knowledge to catalyze conversations and deepen relationships with key supporters.
- ✓ Leverage the tide of the current socio-political context and landscape, especially heightened societal awareness thanks to the racial justice movements of the early 2020s.
- ✓ Ask for insights and feedback on your suggested strategies from both the Board and members, rather than 'permission to act'.
- ✓ Ensure there is transparency and consistent messaging in your work with all key stakeholders, including Board, staff, and members. Consistency and due diligence lead to credibility.
- ✓ Build trust with members via ongoing conversations, virtual or in-person, and facilitate members to connect with one another. Help members forming learning collaboratives and build community with peers.
- ✓ Be authentic and vulnerable in the work and keep your promises.

“The first several conversations, we felt like we would take two steps forward, and then five steps back because we’d get down this road of ‘Yes, this is important and here are the things we should do about it.’ And then someone would inevitably say, ‘We are a membership organization, and we risk alienating members.’”

Lessons for Philanthropy At Large: WPN has experienced a number of challenges that calls for the support of key philanthropic efforts. Some lessons and recommendations to address these challenges include:

- **Resources:** WPN is small team with a relatively small budget, as are many regional PSOs across the nation. It is necessary to continue providing resources for PSOs, including funding and learning tools to assess and track racial equity efforts over time, as well as opportunities to participate in peer learning on both operations, programming, and other forms of equity-focused professional development. Also, PSOs may experience decreased revenue due to loss in membership when they begin their journeys.
- **Representation:** WPN, like most PSOs and philanthropic organizations, knows first-hand the challenges and harm of the lack of representation of people of color in philanthropy. It’s necessary to create change with people of color at the center of the table. In addition, leaders of color navigate overt and covert concerns and resistance from more conservative partners. Representation across a wide spectrum of diverse identities and lived experiences needs to continue to be front and center.

THE JOURNEY CONTINUES

WPN's leadership, staff, and board members identified a number of next steps for their organization's racial equity journey as described below.

Internal

Institutionalize promising practices into policy changes within the organization

WPN has engaged in promising practices such as prioritizing partnerships with people of color owned and operated vendors, but these have been more informal practices rather than formal organizational procedures. To ensure continuity, WPN is considering writing this and similar practices into organizational policies. In addition, WPN is tracking racial equity efforts internally but would like to share about their efforts and learnings on their website and create an external statement of equity.

Incorporate racial equity work into the next organizational strategic planning cycle

WPN's work on diversity, equity, and inclusion (DEI) have supported the organization's internal strategy of becoming an intentional, transformative organization, which will support and inform the next strategic planning cycle. One of the goals for the process is to ensure that additional equity-focused programming opportunities connected to resources are reflected across strategic priorities.

Internal

Help create a guide to support PSOs in initial stages of racial equity journey

Based on learnings over the last few years, WPN would like to explore opportunities to develop practical guides for PSOs that help them engage in conversations, practices, and processes to move organizational priorities and strategies in the direction of racial equity, including sharing guiding frameworks and other resources. Some of these resources may include integrating key indicators of equity-focused growth in organizational dashboards, asking for meaningful feedback from members via annual surveys, and communicating impact.

Support and help grow the network of people of color in philanthropy

WPN would be open to partnering with the Forum and other PSOs to plan a broader, philanthropy-level strategy to help grow the network of people of color in the field.