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# Leveraging Effective Consulting to Advance Diversity, Equity, and Inclusion in Philanthropy

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## Introduction: A Call for Knowledge and Know-How

The desire to achieve social justice missions and compelling humanitarian agendas has propelled the U.S. social sector into accelerated efforts to remodel its institutions to be and do the important work of diversity, equity, and inclusion (DEI). Although many organizations — particularly those created in the last two decades — have DEI values embedded into their missions and framework, there are many mainstream groups that are facing outdated structural ideas and missions. In the same 20 years, there appears to be a greater willingness among foundations and funders to hear and embrace existing efforts to address DEI as well as invite and encourage new approaches.

For example, a 2018 survey from the Center for Effective Philanthropy found that 70% of nonprofit leaders believe that staff diversity is important for achieving an organization's goals (Buteau, Glickman, Leiwant, & Ilegbusi, 2018). In another example, the Foundation Center (n.d.) has data since 2008 that shows there are close to 5,000 foundations investing in racial equity, providing grant support to a similar number of recipients. Although this is an increase of resources, there is a need for more funding and more effective DEI methodologies to serve the other 82,000 or so foundations and nearly 1.5 million nonprofit organizations. Groups such as the D5 Coalition (2016) have pointed out that while more funders are picking up the pace on DEI, the scenario is urgent: Fewer than 9% of foundation CEOs, based on data available in 2014, are people of color, and, while no data are available on the proportion of people of color served by grants to institutions, only 6.9% of grants go directly to communities of color.

### *Key Points*

- In 2018, the National Network of Consultants to Grantmakers launched an initiative to sharpen the impact of diversity, equity, and inclusion (DEI) work in grantmaking by increasing the capacity of consultants and grantmakers engaged in these efforts. Network researchers used a systematic protocol to interview consultant members about their most effective partnerships with grantmakers. Case studies drawn from those interviews yielded valuable lessons for advancing DEI in philanthropy.
- In sharing some of these lessons, this article advises consultants to be prepared to help grantmakers define or refine the meaning of DEI and understand where equity fits into their values and mission. It also explores how a good DEI consulting process helps to distinguish technical and complex dimensions of a DEI commitment, and how the scope of work should encompass both development of internal leadership skills and investment in grantee, community, and issue leaders.
- This article concludes with tips on how smart DEI consultant/grantmaker partnerships can understand and honor emergent strategy and help the funder follow opportunities without overwhelming the size and scale of the funder's capacity.

*Consulting partners are emerging as the "servant leaders" in the DEI field as they interpret organizational aspirations and culture, customize DEI learning and action challenges, and then interpret the learning into action plans and social change models/methodologies for others to adapt or follow.*



In the process of accepting the challenge of embracing diversity, equity, and inclusion in the social sector, some organizations and leaders are stalled by confusion over the terminology and precise definitions of DEI language; yet, others intuitively are accepting the ideas and moving forward with "DEI" initiatives to disrupt inequities and make steady progress toward equity. Most DEI initiatives are focused both internally and externally: Internally, DEI programs usually aim for personal and organizational change; externally, DEI efforts support structural change locally and nationally, aiming for impact like increasing economic self-sufficiency or leveling leadership representation. As awareness grows of economic, social, and political inequalities in communities and institutions, DEI programs are trending up in acceptance in philanthropy and in the broader social sector; they are pursued to change how people work together and restructure institutions and systems for equity. Philanthropy leaders like the Ford, W.K. Kellogg, and Rockefeller foundations and many others are increasing the transparency of their own institutions while also actively funding DEI initiatives throughout the sector.

Achieving transformative change relies on the collaborative efforts of both funders and organizational leaders, along with their experts and constituents, to address DEI. In this mix, consultants (in both content and process) conceptualize, facilitate, and support DEI initiatives in funding/grantmaking and social-sector organizations. Consulting partners are emerging as the "servant leaders"[1] in the DEI field as they interpret organizational aspirations and culture, customize DEI learning and action challenges, and then interpret the learning into action plans and social change models/methodologies for others to adapt or follow.

In an effort to contribute to national efforts to build a community of practice around DEI consulting, the National Network of Consultants to Grantmakers (NNCG) and its DEI Initiative in 2018 began documenting and analyzing the work of its member consultants and collecting and organizing the work of consultant-partners into a field of knowledge about DEI methodology. The purpose of this article is to twofold: 1) to describe and advocate for consultants as key partners in successfully embedding DEI in effective philanthropy and social-sector change, and 2) to provide ways to understand and use the field-based knowledge and DEI methodology emerging through consulting partners' experiences.

This article serves as a comparative study analyzing eight consulting projects or cases focused on philanthropic efforts to achieve DEI with the help of a consulting team. A set of case-by-case tables will help funders and consultants to understand process, outcomes, and unexpected changes. In its work, the NNCG has adopted the

[1] "Servant leader" is a term coined by Robert Greenleaf in 1970 to distinguish leaders who see service as the first priority of leadership. The Center for Servant Leadership (n.d.) advises that the best tests for this mode of leadership include: "Do those served grow as persons? Do they, while being served, become healthier, wiser, freer, more autonomous, more likely themselves to become servants? And, what is the effect on the least privileged in society? Will they benefit or at least not be further deprived?"(para. 3) A servant-leader focuses primarily on the growth and well-being of people and the communities to which they belong. The servant-leader shares power, puts the needs of others first, and helps people develop and perform as highly as possible.

**TABLE 1** DEI: Definitions From the D5 Coalition

| What is DEI? |
| --- |
| *Diversity*<br>The word "diversity" can mean different things to different people. We've defined it broadly to encompass the demographic mix of a specific collection of people, taking into account elements of human difference, but focusing particularly on:<br>• Racial and ethnic groups: Asian Americans and Pacific Islanders, Hispanics/Latinos/Latinas, African Americans and blacks, and American Indians and Alaska Natives<br>• LGBT populations<br>• People with disabilities<br>• Women<br>D5 uses this broad definition of diversity for three reasons. First, this is what diversity looks like in the 21st century. Second, our definition encompasses populations that historically have been — and remain — underrepresented in grantmaking and among practitioners in the field, and marginalized in the broader society. Third, to be a national leader, organized philanthropy must get in front of diversity, equity, and inclusion issues and do so in a comprehensive way. We acknowledge and respect that this is one of many ways to define diversity, a concept that can encompass many other human differences as well. |
| *Equity*<br>Improving equity is to promote justice, impartiality, and fairness within the procedures, processes, and distribution of resources by institutions or systems. Tackling equity issues requires an understanding of the underlying or root causes of outcome disparities within our society. |
| *Inclusion*<br>Refers to the degree to which diverse individuals are able to participate fully in the decision-making processes within an organization or group. While a truly "inclusive" group is necessarily diverse, a "diverse" group may or may not be "inclusive." |

Source: D5 Coalition (2014)



DEI definitions of the D5 Coalition.[2] (See Table 1). These definitions provide the core for NNCG's DEI Initiative and the framework for emerging DEI resources and methodology.

## Mapping the Scope of Roles of DEI Consultant-Partners

Across organizations and the sector, DEI initiatives usually involve a partnership of the funder, grantees, and consultants/facilitators committed to using or discovering a DEI lens to assess and create ideas and actions for effective change.

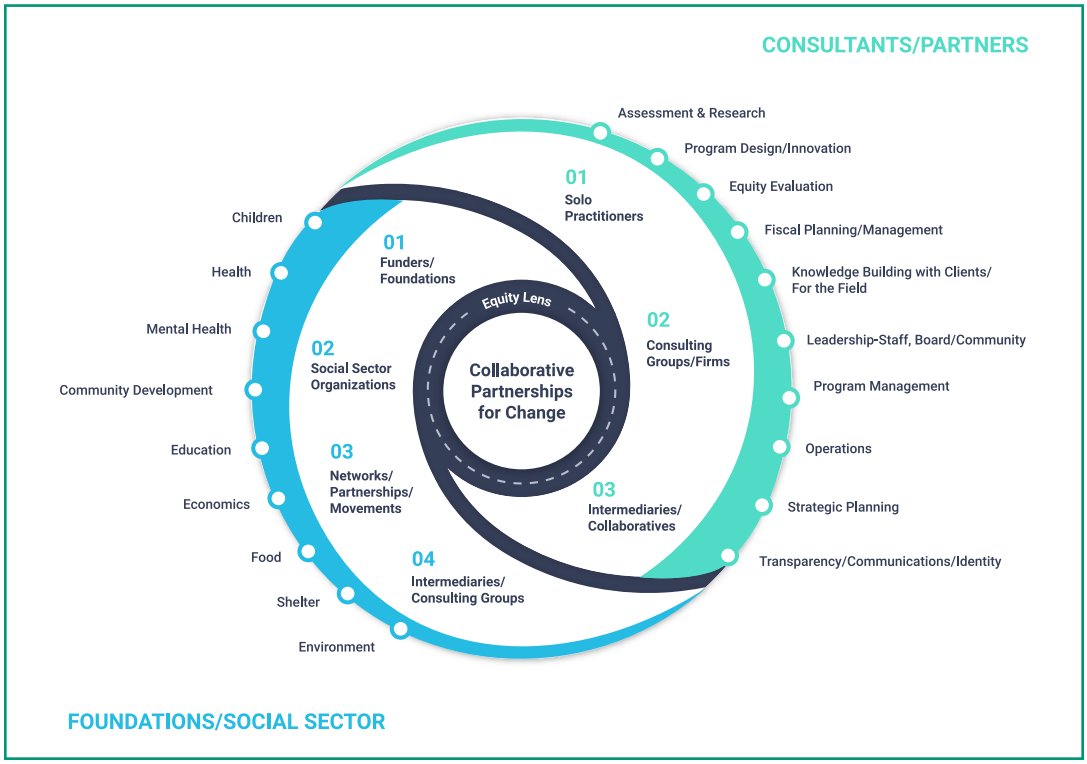
Consultant-partners in DEI initiatives are conceptualizing new ways to do the work while also naming and solving roadblocks. According to the reflections of the consultants represented in the case studies, "DEI" is not so much its own narrow area of competency; rather, it is emerging as an equity approach that spans the breadth of organizational and strategic effectiveness: planning; program and product design; program delivery; staff, board, volunteers, and clients/constituents; operations; impact; evaluation; identity/brand; and more. Foundations are confronted with the idea of what it means to be diverse, equitable, and inclusive. It requires a full organizational review and often a full transformation — processes guided by both consultants and peers in philanthropy.

## DEI Partnerships in Philanthropy

How exactly are funders and organizations taking on the challenge to do better at DEI,

[2] The D5 Coalition sunsetted in 2018 after eight years of work in advancing DEI in philanthropy.

**FIGURE 1** Roles for DEI Consultant-Partners in Philanthropy




and how are consultants helping them do it? This article is based on the work of the NNCG to collect and organize experience-based data that improve methodologies, recognizing that changing the field's practices requires field-based knowledge. The NNCG is organizing case studies on DEI projects that provide a real-life look at how DEI practices are used to meet organizational needs. (See Figure 1.) The case studies reveal the impetus as well as the journey made by organizations trying to do more on equity. These studies provide a starting point to capture experiences and methodology as a way of sharing and developing DEI "practice," leveraging the vantage point of consultants who are often go-to resources for and allies to foundations implementing DEI efforts.

To date NNCG has collected eight case studies that span a range of clients/partners, among them two family foundations; two health conversion funders; one national funder and a multifunder collaborative; an intermediary philanthropy focused on women of color; a funder affinity group; and a major, national nonprofit organization. (See Figure 2.) All of the funders are medium to large organizations with million- to multimillion-dollar grantmaking levels.

The differences among the consultants serving these clients mirror the complexity of the philanthropy consulting field. They all are multispecialty consulting firms that integrate the values of DEI into their own theories of change and approaches to consulting. Their skills and services focus on one or some of these classic areas of consulting: organizational capacity development; leadership; evaluation; strategic planning/decision-making; grantmaking and program design; research; assessment; communications; and fundraising/finance. Of the firms involved in the eight case studies, two are solo practitioners; five are the founders and leaders of small to medium-size firms (five-30 people); and two are medium-size philanthropy intermediaries. All have social justice and equity values that

**FIGURE 2** The 8 Case Studies: Clients and Consultants

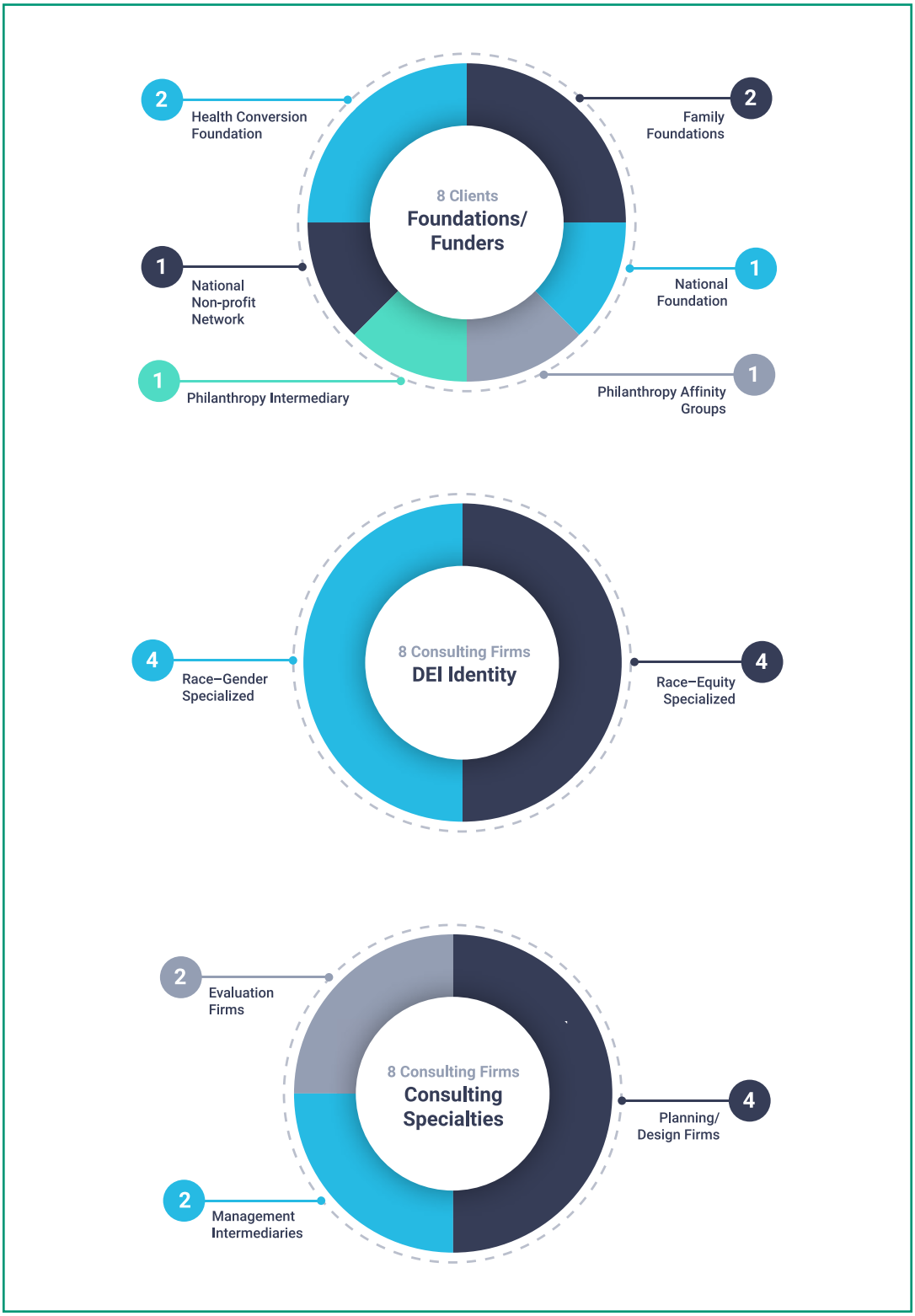
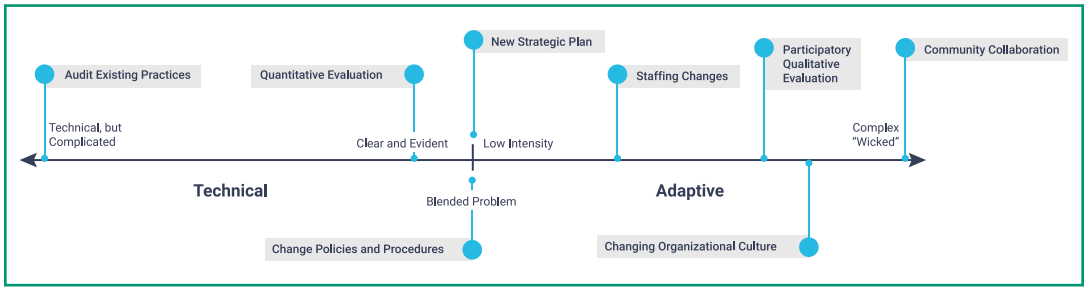


**FIGURE 3** Making Change: Problems, Leadership, and Innovation




Source: Heifetz, Linsky, & Grashow, 2009

are transparent and branded into their identities as consulting firms or intermediaries. Their equity expertise is varied: Four are identified specifically with race equity, and the others are known for gender or race-gender work.

None claim or want the title of "DEI" consultants, though they are clear about their commitments to DEI and broader social change for equity. One of the consultants captured a shared sentiment: "A consultant's own deep mission drives expertise." Another reflected,

> We believe in being intentional as consultants about keeping concepts of DEI front and center in the work. ... Sometimes it takes creative thinking and tenacity to find ways to exercise DEI when a client's resources and time are limited ... and in some projects we don't refer to "DEI" by name, yet the work on DEI principles can be effective.

These consultants are a small cross-section of an increasingly large and diverse field of philanthropy consulting. While some embed DEI principles into all their capacities, others identify substantial portions of their portfolios as being focused directly on DEI. The frameworks and drivers of projects also differ depending on the client's goals, context, or community. While consultants are helping to make advances in every area of organizational effectiveness, they have been particularly powerful in modeling how change can happen in DEI. Equity-driven philanthropy affinity groups and consultants — among them the Association of Black Foundation Executives (ABFE), the Women's Funding Network, the D5 Coalition, and Change Philanthropy — were early leaders in equity change.

Several of the cases emerged from consulting projects that centered around research/scanning and assessment activities that could help the client organization understand the definitions and scope of the words and concepts for DEI. One client told its consultant, "We want to go from 'standing up' for DEI to taking action." Two clients wanted to know what it would take to make the changes once the DEI issues could be identified; they asked their consultants, "How does an organization/funder actually make changes to acquire and make impact with a DEI lens or culture?" Three clients were aiming for specific outcomes — two with goals in health equity, and another aiming for gains in leadership for women of color/gender identity. And two were focused on doing evaluation using practices that are transformed by DEI principles.

One of the most compelling common denominators in these cases is the arc of each client's journey. The clients — funders or organizations — asked their consulting partner to help them to start a DEI project or initiative with some early steps (i.e., defining, learning, assessing) that would have real impact on their organizations (i.e., staff, board, grantees, constituents) and could be done in a finite time frame. Most of the funder-clients framed their work in sweeping aspirations and some awareness of the scale of achieving DEI in philanthropy. But, as they plunged into the work, they learned that there is little in a quest for equity that is a quick fix; almost everything involved with achieving

**TABLE 2** Case Study No. 1: The Big Windfall

| The Initial Project Mandate | The Emergent Issue That Altered the Work | The Roadblock and the Breakthroughs |
|---|---|---|
| Design a new grantmaking program for the expanded assets; facilitate creation of a new strategic plan for grantmaking and operations, including an expansion of staffing. | Data about the community had a "consciousness raising" impact on foundation leaders that compelled them to an equity agenda. To do that well, it recognized the need to do its new grantmaking in a much bigger cross-section of the community. It accepted that it had to get the word out widely in the community about its expanded capacity, and realized the need to "hear" the community.<br><br>The foundation began to see itself in partnership with the community, rather than a distant friend to it, and began to transform its philanthropic perspective: Work "with," not "for." | The family wanted to focus on new grantmaking, but every step toward program growth and greater impact also raised challenges for the foundation's own development. The decision to hire a senior staff member came with an awareness that this person would need to know the community and preferably be from the community.<br><br>Ultimately, the bulk of the first round of funding (65%) went to many new organizations that had not been funded before; the new staff manager, a woman of color, has deep roots and experience in the community.<br><br>Staff leadership diversity has been lifted by the D5 Coalition and others as an important accelerator in DEI change.<br><br>The board has committed to more board development and more engagement in the foundation's work and in the community. |

equity is complex and destined for solving through time. Even though many were hoping for a mostly technical, "fix-it" solution, the foundations and donors revised their thinking and their plans to accommodate complex change strategies that could happen over time.

This evolution of thinking that happened in almost every case can be best understood by incorporating the "technical-adaptive" scale for leadership and problem-solving. (See Figure 3.) This scale is useful in illustrating that some problems or ideas fit on one side or the other of this continuum, and some problems and solutions are a blend of both technical and complex or adaptive ideas. This scale runs through the case studies and is useful in understanding both the cases and the summary analysis.

The consultants reported that the clients all understood that they were venturing into new or challenging territory with a DEI project or initiative, but that each thought they were scoping out a reasonable, if not humble, starting point. They all ended up with more information and action options than they had imagined, and most made deep and meaningful breakthroughs toward restructuring the culture, goals, and potential impact of their organizations. In each of the cases, the client-consultant relationship evolved. The projects took unexpected twists and turns — new issues emerged that exceeded or deepened the original contract, and roadblocks had to be removed so that breakthroughs could be achieved.

To provide the main lessons learned as well as a brief analysis of the case, each of the eight cases is organized to examine the initial project mandate, the emergent issues that altered the work, and the roadblocks and breakthroughs.

## The DEI Case Studies: Humble Beginnings and Big Breakthroughs

### *Case No. 1: The Big Windfall*

A family foundation experiencing a generational shift and a huge increase in assets needs to change its grantmaking and operations. (See Table 2.)

**TABLE 3** Case Study No. 2: Improving Community Health

| The Initial Project Mandate | The Emergent Issue That Altered the Work | The Roadblock and the Breakthroughs |
|---|---|---|
| Assess state-based philanthropy of a conversion foundation and report back on what's working, then facilitate development of a new strategic plan to improve grantmaking and outcomes, including being more effective in terms of equity. | The assessment had to also help define equity, so the foundation leaders could understand equity and assess the impact of current programs in order to make future plans.<br><br>Everyone in the organization had to learn more about the basics of DEI in order to decide what to change and how. The consultant knew about reports commissioned by and about other funders; the use of this information made a big difference to this foundation's ability to understand the issues and to see itself in context. | Accepting a responsibility to do more on equity is a "stop/start," "hot/cold," or "accept/reject" pathway. While an insight into inequity inspires leaders to want to change, they then may lose confidence or feel unsure about how far to go.<br><br>Defining equity is important, but it is not necessarily possible to get it — especially with a simple or time-limited strategy. It is easy for leaders to misunderstand their own equity work, or lack of it. Sometimes aspirational language is put on the record and this stands in as action.<br><br>Operationalizing big, strategic ideas becomes critically important, but requires more planning and commitment. The consultant helped the client see a current reality and to begin to imagine a long-term pathway for change. |

Sector

*Most powerful lessons:* This foundation has a geographic mandate — essentially one metro area — where it has funded for years across multiple issues and without regard to the class of beneficiaries. With the windfall of new resources (an endowment of about $20 million grew to about $100 million), the consultant encouraged the family members to look at the data and demographics of their geography and to try to view areas of need and gaps in services with a "new" lens. Once they saw the data, they understood the compelling needs: The disparities were so powerful that the family members agreed they could no longer continue with general funding, and wanted to be focused on the communities' poverty, diversity, and related disparities. This insight and organizing principle for program strategies affected many of the strategy and operational decisions they would make in their strategic-planning process.

### *Case No. 2: Improving Community Health*

A statewide health conversion foundation was striving for better health outcomes and reasoned that increasing its focus on equity might help, but it needed to understand its situation better before making a big change. (See Table 3.) The foundation brought in a consulting team to document its internal situation and to engage everyone in the organization to understand the big picture.

*Most powerful lessons:* Foundations and leaders can sense that they need to do more to achieve equity, and yet do not want to be discredited for past actions since they believe that so much of their cumulative work to help people has inherently been about equity and diversity. Institutions want to improve for the better, but don't want to be found to have been wrong or inadequate. Making a plan for the future that includes real change can be supported effectively with data and comparative experiences that are trustworthy and believable to the decision-makers. Strategic planning in this context requires time for learning as well as decision-making.

### *Case No. 3: Make a Mark on Gender, Race, and Human Rights*

A young family foundation in a generational transition wanted to launch a new era by making a big difference. Family leadership decided to

**TABLE 4** Case Study No. 3: Make a Mark on Gender, Race, and Human Rights

| The Initial Project Mandate | The Emergent Issue That Altered the Work | The Roadblock and the Breakthroughs |
|---|---|---|
| Help the foundation leaders to imagine and operationalize a large funding initiative (30 grantees over five years) that would make a noticeable difference for race, gender, and human rights; monitor and evaluate grantee progress and devise ways of strengthening the grantees and their impact. | This funder was in a hurry for impact and wanted to build the bike and ride it at the same time. Emergent learning had to be integrated quickly into evolving ideas about the grants.<br><br>The desire to strengthen the grantees while the grantees worked for high impact required the funder to provide "more than money." That approach to giving included supporting consultants and staff to work directly with grantees to find and overcome inhibitors to their impact — in their strategies and/or their operations. | As learning accelerated, race and racial equity emerged as a dominant issue that changed the shape of the funder's goals and expectations.<br><br>The funder made decisions to add substantial learning opportunities for its staff, board, and all the grantees so that racial equity could be more explicitly intersectional in all of the grantees' strategies.<br><br>The initiative was structured for each grantee to succeed individually while learning from and being inspired by all the other grantees in the initiative. To compare outcomes, the foundation needed to define impact strategies. As a result, the foundation also adopted a framework for impact so that all grantees would have a shared language. |

plan and implement a five-year initiative requiring a spending level well beyond the payout in order to make a substantial difference for gender, race, and human rights issues and institutions. It wanted consulting guidance for planning, implementation, and evaluation. (See Table 4.)

*Most powerful lessons:* The foundation leaders thought that what they most needed was a strategic plan for their grantmaking, which they intended to be an aggressive strategy engaging bold grantees with strong social-change missions. They discovered that most of their grantees —funded for their potential for innovation and scaling up social change — needed support to stabilize and grow. And the grantees agreed that to be intersectional in their approach to equity (i.e., working on multiple equity issues like race, gender, class, ethnicity, and abilities affecting people), they needed to be more informed about gender, human rights, and, especially, about race. In addition, the foundation decided to align its own staff, board, operations, and investments to support its gender/race/human rights focus; everyone and everything in terms of the foundation operations and programming were aligned for and became part of the drive for impact.

### *Case No. 4: A Complex Evaluation Partnership to Launch an Equity/Social Justice Collaborative*

A new philanthropic intermediary needed help to launch and evaluate an initiative to make grants and build capacity for organizations with women of color and transgender leaders working in and for the reproductive justice movement. Ultimately, the performance of this intermediary, along with its grantee leaders/organizations, was intended to catalyze more philanthropic investment in the reproductive justice movement. (See Table 5.) Known primarily as an evaluation/planning firm, the consultants are committed explicitly to DEI values and their other clients openly want to advance racial and/or gender equity, among other DEI values.

*Most powerful lessons:* This case is about an 11-year partnership between the consultant and the funder and the funder's grantees. Over time

**TABLE 5** Case Study No. 4: A Complex Evaluation Partnership

| The Initial Project Mandate | The Emergent Issue That Altered the Work | The Roadblock and the Breakthroughs |
|---|---|---|
| Evaluate from startup an intermediary funder's efforts to support and strengthen organizations at the forefront of the women-of-color and transgender-led reproductive justice movement. | How can an evaluation process enable the participants to share information that is culturally relevant and that supports definitions of "success" and "impact" held by their own organizational constituents? This project also wanted to understand and help build up a movement beyond each organization's effectiveness. | Developing a theory of change had to be accomplished in order to structure an evaluation tool/process. The culture of the initiative is participatory and collaborative, and evaluation could not be imposed.<br><br>The need for data sometimes coincided with the grantee partners' limited personnel, technology, time, and money for evaluation activities.<br><br>Listening to grantee partners and accepting new ideas made a difference. Grantees learned to speak up about evaluation questions that did not allow the grantees to report on their experiences. This led to new thinking and language that is more inclusive, which in turn fosters the ability to reveal information. |



**TABLE 6** Case Study No. 5: Moving DEI to the Center of a Network's Culture

| The Initial Project Mandate | The Emergent Issue That Altered the Work | The Roadblock and the Breakthroughs |
|---|---|---|
| Help a collaborative, multisectoral, multipartner national organization to begin a journey to understand racial equity and to operationalize it centrally in its work and culture. It wanted to build a consensus understanding of the gaps in culture, values, practices, and policies that were a barrier to a full programmatic commitment to racial equity. | Culture change takes time.<br><br>There is a need for a clear understanding with organizational leadership of how much work a DEI transformation requires and how difficult it can be to create authentic relationships around race, power, and privilege. | Diversity does not mean equity, and a scattering of DEI efforts are not enough for real change and achieving equity.<br><br>The process searched for and the client accepted many new ideas, including this action framework for the project:<br>• Make room for new information.<br>• Gain understanding through a facilitated, interactive process.<br>• Examine implications.<br>• Gain commitment from leaders and staff.<br>• Align action, even while the work is in progress.<br><br>Ultimately the organization agreed to a three-part action strategy to integrate racial equity and inclusion:<br>• Organizational learning: Proactively learning as an organization<br>• Public engagement: Strategically using all platforms to engage public conversations about racial equity<br>• Make a plan to integrate: Achieving racial equity and inclusion throughout the organization |

**TABLE 7** Case Study No. 6: Evaluating a Racial Equity Process for Health Equity

| The Initial Project Mandate | The Emergent Issue That Altered the Work | The Roadblock and the Breakthroughs |
|---|---|---|
| Help a regional health conversion foundation to assess the effectiveness of a community-based racial-equity approach to health equity. | Eight multi-entity and cross-sector community collaboratives were asked to apply a racial lens to their local collaboration processes and their work, and to inform the funder on ways to improve its grantmaking for true health equity. | The collaboratives had difficulty thinking about power-shifting strategies in their communities; they were limiting their thinking to programs and services.<br><br>The consultants learned to go above and beyond to help the partners understand systemic change: the value of qualitative, not just quantitative, information and setting realistic, long-term change goals, not short-term fixes.<br><br>A combination of inclusive strategies to form the local groups — training them about concepts of racial equity, learning to use a racial-equity impact assessment tool, peer-learning sessions, and technical assistance — helped each collaborative group to do its work. |

the partners have used their experiences to create learning methodologies that rely on the participation of all to create knowledge and standards. The grantee partners are engaged in developing and refining the data-collection processes; they are not just contributors to the data. The consultant, intermediary, and grantees all learned that to be inclusive and to capture the real story of projects aimed at equity, the process of data collection also has to be inclusive. It requires taking time to reach out to stakeholders who have indicated that a data-collection tool or report of evaluation findings excludes them, and then making appropriate revisions with an inclusive process. It means carving out time in an intense timeline to invite a diverse group of community stakeholders to share their reactions and insights about the work. These partners discovered that this is indispensable to integrating DEI values and principles into the work.

### *Case No. 5: Moving DEI to the Center of a Network's Culture*

A major national network stepped forward to make progress on equity in its highly complex organizational structure. (See Table 6.)

*Most powerful lessons:* The organization and its consultants emerged from the first phase of the work with some fresh insights about what the work of inclusion actually involves, and have captured four lessons:

- Diversity does not equal equity. While diversity (staff, board, contractors) is important, by itself it falls short of equity.
- Racial equity starts at home. Organizations cannot jump into an external-facing racial-equity initiative without first doing the tough work of examining the ways systemic and internal issues are impacting daily experience.
- Work across the organization. Deepen and improve current work in concrete ways.
- Partner with those who have proven track records. Look for peers, colleagues, and partners who already are on a path to equity. Look for collaborative possibilities and interpersonal bridge-building.

### *Case No. 6: Evaluating a Racial-Equity Process for Health Equity*

Consultants were asked to review a collaborative community process that explicitly addresses racial equity by building community expertise in using a racial equity lens for better community health outcomes. (See Table 7.)

**TABLE 8** Case Study No. 7: Philanthropists Bending Philanthropy Toward Equity

| The Initial Project Mandate | The Emergent Issue That Altered the Work | The Roadblock and the Breakthroughs |
|---|---|---|
| Scan and write a report about how various funders are handling DEI, which led to a request to facilitate and guide a group of funders to form a community of practice to define, learn, engage others and make changes in DEI practice in philanthropy. | Those in the startup of this community of practice first believed that sharing information about DEI would lead to change.<br><br>They then realized the need to go deeper — to actually transform one foundation at a time, which would then eventually transform philanthropy. It sounds like a slow approach, but for anything to stick, the policies and practices inside the institution needed to change beyond lip service. Increasing numbers of foundations are joining in or seeking information. | This "roundtable" is activating a movement toward DEI within philanthropy. Participating foundations need an environment that is member-driven but also coordinated and guided with expertise and knowledge. The consultants are co-creators/co-leaders with the funder-members.<br><br>The consultants devote time to the content work, but also to building relationships between and among members. They are working on three levels with the members:<br>• Helping each member to make change in its own foundation<br>• Facilitating a meaningful experience among the members to catalyze the larger change goals<br>• Helping to design and deliver information and engagement to inspire interest among others not yet in the group |



*Most powerful lessons:* The consultants themselves learned that an evaluation that involved many players (eight multisectoral community collaboratives) and processes needed technical assistance, coaching, and training. The process was strengthened by creating a holistic view of the community work, and then working collaboratively with the foundation to provide information and feedback. Traditional notions of favoring quantitative data and treating the foundation as the primary audience and user of the evaluation were not useful. All the partners — the foundation, the community, and the consultants — had to be both flexible and practical, and to see that racial equity is systemic as well as programmatic. Qualitative data had to be valued equally with quantitative, and the evaluators had to learn to work with the community by "reading" what was said and not said.

### *Case No. 7: Philanthropists Bending Philanthropy Toward Equity*

A major funder commissioned a consultant in a short-term contract to scan and report on the DEI efforts of other foundations, which then evolved into a multiyear "roundtable" or community of practice of funders for sharing, learning, and leading on DEI issues within philanthropy. (See Table 8.)

*Most powerful lessons:* From the first step of commissioning a scan, this project was about change. The consultants did not expect initially that their role would evolve from research to facilitation, organizing, and leadership for DEI improvements in philanthropy; they had not anticipated that a one-off project for one foundation would turn into a multiyear initiative to influence many foundations and the field of philanthropy. They learned to create a working environment for the project that is simultaneously member-driven and consultant-guided. In order for the group to learn, work together, and then influence the field, the consultants had to step into a co-leadership role. Their time and work strategies had to involve relationship-building with each member and then with the group and the broader field. The project has required a broad array of consulting capacities. This type of initiative opens possibilities for how consultants can do sustainable change work with their clients, and not merely "projects."

**TABLE 9** Case Study No. 8: How Are We Doing? Assessing the Implementation of a DEI Policy

| The Initial Project Mandate | The Emergent Issue That Altered the Work | The Roadblock and the Breakthroughs |
|---|---|---|
| Conduct an organizational racial-equity audit of a large philanthropy affinity group with a small staff /hub. The audit was to include its programs, policies, practices, culture, and communications.<br><br>The expected result was a qualitative and quantitative analysis of the work and workspace and the gaps between current practice, and recommendations for a desired future state. | The affinity group had codified its commitment to racial equity through a "statement of purpose" adopted among the members 10 years ago. The audit was intended as the tool to help illuminate strengths as well as areas for further improvement and action. | The hub organization is small and had modified most of its own internal practices to model and support DEI. But readiness for action varied widely among members, and therefore an action plan to change individual members had been uneven in taking root. During the audit, it became evident that some transformative changes — for example, more participatory grantmaking — should be part of DEI efforts and conversation across the membership.<br><br>The audit began to reveal how complex it will be to get changes in practices across the membership, especially those that realign the power in philanthropy.<br><br>A report was produced from the audit, but it is not clear if such a small, hub organization can facilitate its members to go after changes in their own organizations. |

### *Case No. 8: How Are We Doing? Assessing the Implementation of a DEI Policy*

A funders' affinity group committed in 2008 to DEI goals for its own operations and its members. But how do you measure effective implementation — can adopting a policy drive real change among members? The funding group asked a consultant to assess its progress and bring back recommendations for improvements. (See Table 9.)

*Most powerful lessons:* Racial equity is at the center of DEI. While DEI is an intersectional framework, it is often important to recognize the importance of leading with race. Neither a consultant nor a funder can "do" DEI if they are not "being" DEI. In other words, you can't help others if you are not challenging and improving your own internal operations (e.g., Do you have a shared language around DEI — values, communications, culture?). Finally, the knowledge and resources on DEI are sometimes outdated or difficult to find. Although much of what has been published is still relevant, there is a need for new resources based on contemporary and emerging experiences.

## Recommendations for Effective DEI Work

The real experiences and lessons learned that unfold in the NNCG case studies show patterns of practice that offer much-needed knowledge and know-how to funders, their grantees, and the consultants who assist them in pursuing a bigger, deeper commitment to DEI. While funders and consultants work hand in hand, these findings are based on the views of consultants about the work and evaluation of the work. The case studies did not rely on formally designed shared evaluations with the philanthropy clients.

For those venturing into aspirations, goals, and/or initiatives on DEI, these ideas for better practice could lead to greater success. When synthesized, the eight case studies yield some useful cross-cutting recommendations for proceeding with DEI aspirations and projects:

1. *Define the meaning of diversity, equity, and inclusion (Case Study Nos. 2, 5, 7, and 8).* Don't rush to implement change until the appropriate leaders and participants (board, staff, grantees, stakeholders) understand the

*Consultants occupy a unique sphere in the world of philanthropy. They represent their own individual commitments to DEI, but possess the opportunity to share their knowledge and ideas on furthering DEI by working closely with multiple foundations.*



meaning of diversity, equity, and inclusion. Consultants can offer starting definitions from other sources (e.g., see Table 1), and then guide their partners through a process for adapting or creating clear and useful definitions in their context. This process — particularly when it is information-based and participatory — can be a key ingredient in launching a successful initiative. The definitions likely will change over time, but organizations need to have some common language in order to do the work.

2. *Create a trusting partnership between foundation/client and consultant (Case Study Nos. 3, 6, and 8).* This will not be just "work for hire." Pursuing equity touches values, vision, mission, organizational structure, and operations. It all connects and it all will change as DEI efforts increase. Interchangeably, the foundation/client and the consultant will be learning, leading, and innovating. Being forthright and transparent about trust will be important to thrive in an iterative learning/action/learning process. As a 2019 *Stanford Social Innovation Review* article by Brittany Boettcher and Kathleen Kelly Janus (2019) observes, "Trust is a key ingredient to building processes that favor diversity, equity, and inclusion. ... Philanthropy must shift from the position of gatekeeper to the role of ally and partner" (para. 7).

3. *Make room in the work for all partners to understand that equity goes beyond diversity and inclusion and is intersectional (Case Study Nos. 3 and 6).* Recognizing equity as intersectional can be especially difficult when race, gender, and other equity issues are all part of the intersection. Both foundations/clients and consultants need to take time for this essential learning step. Sometimes this might include a "DEI lens" review of the organization's own practices and portfolios, looking for both strengths and problems. Respect all stakeholders in the process, and assume that any of them can and will have useful insights and ideas.

4. *Guide DEI projects and initiatives into a scope broad enough to articulate aspirations and goals as well as committing to internal changes and action (Case Study Nos. 1, 2, and 5).* DEI cannot be a "stick-on" commitment; it must be embedded and internalized into policies and practices. Any aspirational plan also needs an operationalizing plan, and actual operationalizing takes time. Foundations should be willing to fund the strengthening and capacity building of philanthropy and grantee partners; and the partners should seek and welcome opportunities to build themselves for the long haul. Deep change will take stamina.

5. *Distinguish the technical, "fix-it" elements of a solution from more complex and adaptive change strategies (Case Study Nos. 4 and 7).* Foundations and organizations will need to allocate precious resources to change, and can do a better job when they can match the right resources to the problem or challenge. Finding some things that can be "fixed" (i.e., technical actions in the technical/complex scale) can enable quick and/or inexpensive action, leaving more resources for those issues that will require many players and a longer time frame for making change. (See Figure 3.)

6. *Embrace emergent strategy (Case Study Nos. 3 and 8).* In DEI work, the starting point often is a brief takeoff point for a quick and lively evolution of ideas and action. But emergent ideas inevitably change the scope and assumptions about the situation. Even when incremental changes are the goal, new ideas can result in leaping forward — and that can be disruptive. Preparing everyone to welcome emergent ideas that can reframe or redirect action is important for success.

7. *Commit to ongoing organizational learning (all case studies).* Committing to DEI is a commitment to cultural change; and cultural change only happens when aspirations, design, operations, roles, and actions all transform. The thoroughness of cultural change requires an active learning environment that embraces ongoing organizational and leadership learning and development.

## Conclusion: How Consultants Can Fill Critical DEI Gaps

Consultants occupy a unique sphere in the world of philanthropy. They represent their own individual commitments to DEI, but possess the opportunity to share their knowledge and ideas on furthering DEI by working closely with multiple foundations. As illustrated in this article's case studies and summarized in the concluding points, a trusting partnership between the foundation/client and consultant is crucial to guiding successful DEI projects and initiatives. By working together, foundations can provide the resources to tackle DEI strategies, while consultants can provide guidance that may range from "fix-it" elements to more complex and adaptive change strategies.

As more and more foundations understand the need and importance of DEI in their workforce and grantmaking strategies, the need for consultants in this sphere will only increase.[3]

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[3] Additional resources for establishing effective consultant/foundation partnerships to support diversity, equity, and inclusion can be found at https://nncg.org.