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Diving Deep on Equity and Power: Exploring Shifts in Philanthropic Practice With the Iceberg Model

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Introduction

“Pandemics have forced humans to break with the past and imagine their world anew. This one is no different. It is a portal, a gateway between one world and the next.”

– Arundhati Roy

The confluence of events and crises of the last several years — and 2020 in particular — have led to seismic shifts and disruption to the world as we know it, bringing social, racial, and economic inequities into sharp focus. When the COVID-19 pandemic began wreaking global havoc in early 2020, the disproportionate health outcomes and economic fallout among low-income communities and people of color quickly became evident. The May 2020 murder of George Floyd and widespread recognition of ongoing police violence against Black citizens ignited massive protests and calls for racial justice. Adding to the painful period of disruption were the polarizing electoral cycle; floods and wildfires; and enduring economic crisis. These years, while challenging, have also presented an opportunity, as Arundhati Roy (2020) suggests, to “break with the past and imagine the world anew.”

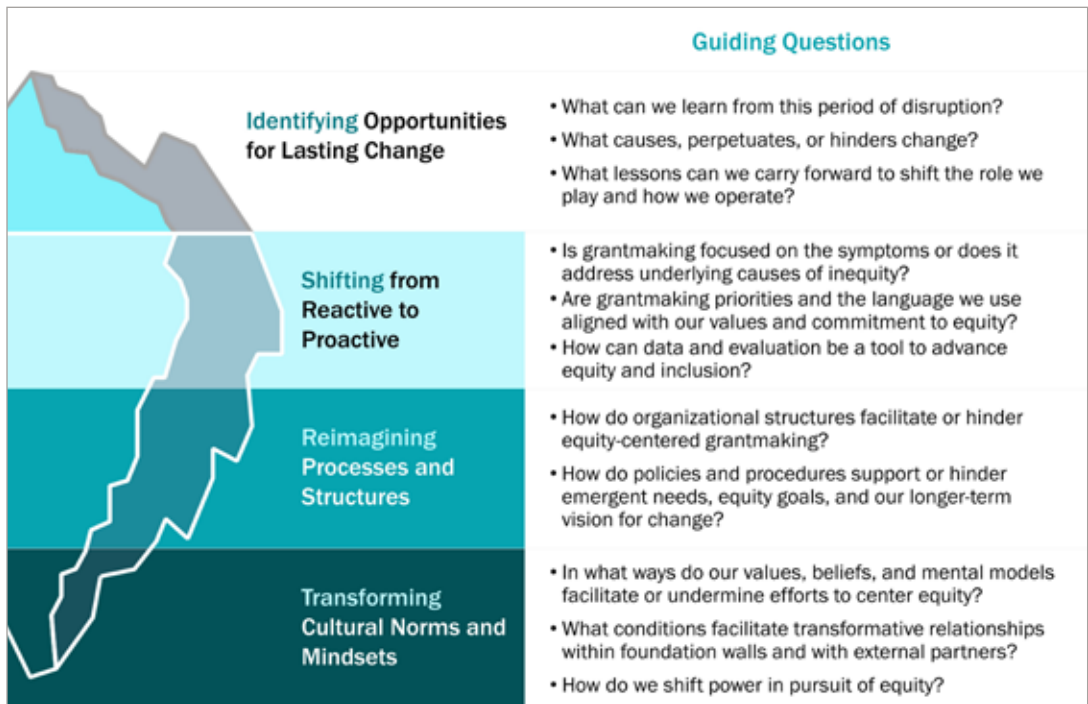
Foundations have a long history of responding to disasters with immediate relief as well as longer-term efforts to restore and rebuild. In the United States, foundations responded to the COVID crisis on a scale not seen before. In 2020 alone, roughly \$20 billion was dispersed globally, far exceeding philanthropic funding for any other disaster in recent memory (Webster, 2021).

Key Points

- Lessons from the events of this historic time — from a national reckoning with systemic racism to a global pandemic and its economic and social fallout — have deep implications for philanthropy that go beyond grantmaking and include fundamental questions about the sector’s role, power, and influence in advancing equity and social change. Confronting those questions requires a look inward at the practices, policies, structures, mind-sets, and cultural norms that govern how foundations operate.
- The experience of The California Endowment and The James Irvine Foundation shows what can be learned from this period of crisis and disruption. Through specific examples from both funders, this article illustrates how the iconic iceberg model can be used as a tool to move beyond surface-level responses to explore eight tangible, equity-focused shifts in the way they practice philanthropy.
- This article also shares reflections on what it really takes to shift norms, structures, and power in ways that lead to equitable outcomes and embed equity throughout an organization — and what gets in the way.

But in today’s context, traditional crisis response simply is not enough amid calls for systemic change to address persistent inequities.

Lessons from this historic moment have deeper implications for the sector beyond grantmaking,

FIGURE 1 The Iceberg Model and Guiding Questions

and include more fundamental questions about the role, power, and influence of philanthropy in advancing equity and social change. Foundations must look inward at the practices, policies, structures, and cultural norms that govern how they operate, implement strategies, and seek to tackle the mission-critical issues they care about. As Sidney Hargro, executive director of the LeadersTrust, notes,

This idea of advancing, centering and leading with racial equity is not just about grantmaking. It's about your organizational culture. It's how you operate, how you use your platforms, how your endowment is invested, how you're ... involved in policy that actually affects the people that you're trying to serve. (Dorfman, 2021, para. 17).

In this article, we use the iconic iceberg model as a tool to move beyond surface-level crisis response to deeper explorations of equity-focused shifts in foundation practices, structures and cultural norms (Academy for Systems Change, n.d.). Some of these shifts float just below the surface and are easier to name and

address. Other interconnected aspects that shape how foundations respond and adapt — values, assumptions, and cultural norms — are submerged well below the surface and, while hard to change, is where transformation happens. This model is not presented as step-by-step guide that suggests foundations should tackle deeper issues only after more surface-level changes are made. Rather, it offers a framework and questions that can aid foundations in centering equity throughout their organizations. (See Figure 1).

To illustrate the use of iceberg model, we highlight the experience of The California Endowment (TCE) and The James Irvine Foundation and their journey to integrate equity across their organizations. We offer reflections based on evaluation findings from the Endowment's COVID-19 grantmaking as well as interviews with staff from the Irvine Foundation.

The Tip of the Iceberg: Identifying Opportunities for Lasting Change

Since 2016, there has been a notable uptick of crisis-driven grantmaking as well as deep

[O]rganizational change, particularly in a large foundation, can be painstakingly slow and often consists of small, incremental shifts in behaviors and habits.

reflection across the social sector about structural inequities and persistent racial disparities. For example, the Irvine Foundation launched rapid-response grants to protect immigrant rights and address the crisis at the U.S.-Mexico border (Engage R+D, 2020a). Through the Fight4All Fund, the Endowment sought to prevent the rollback of the Affordable Care Act and ensure access to health and social safety net programs for all Californians, regardless of immigration status. Engage R+D worked with TCE and Irvine to evaluate these earlier rapid-response efforts, which are part of the evolution and the trajectory of what we highlight in this article.

The immediate philanthropic response to COVID in 2020 was a flood of emergency grants and a pledge from hundreds of foundations to relax reporting requirements and convert programmatic grants to general operating support (Kasper et al., 2021). During the same period, calls for racial justice resulted in a wave of public statements and commitments from philanthropy, followed by critiques and skepticism about whether those pledges would lead to real change (Beer et al., 2021; Daniels, 2020). These early statements and pledges were, in many respects, the tip of the iceberg.

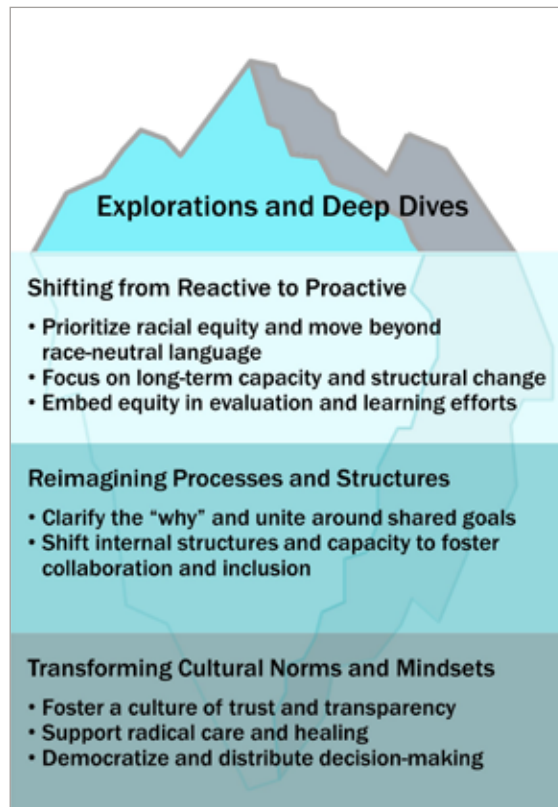
While it's important to mitigate the immediate impact of disruptions to people's lives and well-being, we need to move beyond reactive responses to examine the underlying root causes and dynamics that create harmful inequities. While pledges and more flexible funding are commendable, proactively addressing issues of power and equity is where the real work begins

(Avery et al., 2020). This includes a deeper interrogation of how the philanthropic sector perpetuates or fundamentally addresses issues of power and root causes of inequity. A recent survey of more than 250 foundations highlighted many surface-level responses to the 2020 crises from the U.S. philanthropic sector. However, the study also revealed that respondents perceive an overall lack of internal policies, practices, and tools for advancing racial equity, making it difficult to embed equity in their work (Haymon et al., 2020).

Less information has been shared about internal efforts to shift practices and mindsets, in part because it requires often uncomfortable exploration of deeply held beliefs, assumptions, and cultural norms. But for real change to happen, we believe it's important to share both progress and pain points. It's also important to acknowledge that organizational change, particularly in a large foundation, can be painstakingly slow and often consists of small, incremental shifts in behaviors and habits. To support deeper dive explorations, we intentionally focus on internal practices and norms that shape how foundations operate, engage with external partners, and use their power and influence. We start with high-level questions (at the "tip of the iceberg") and share eight key explorations as we dive deeper below the surface. Specific examples from one or both foundations illustrate work related to each exploration, re-examining language, rethinking structures, testing new practices, and reflecting on what it takes to embed equity in a foundation. (See Figure 2.)

Below the Surface: Shifting from Reactive to Proactive

The events of 2020 have called for bolder and more explicit language coupled with requisite action and accountability. As foundations strive to embed equity, it's important to be clear and explicit about language and how it aligns with goals and intended impact. In addition to moving beyond race-neutral language, many funders are re-examining their funding priorities and practices. For example, some foundations are prioritizing support for organizations whose leaders are Black, Indigenous, and people of

FIGURE 2 Summary of Deep Dives and Explorations

color (BIPOC), which tend to be smaller and less resourced but are most proximate to community needs and priorities. These same front-line organizations that provided critical community supports during the pandemic have been hit hard by economic instability (Douglas & Iyer, 2020). Other funders are sharpening their use of disaggregated data and evaluation as tools for learning, case-making, and advancing equity. While these strategies seem straightforward, moving from language to actualizing equity internally requires intention and willingness to have uncomfortable conversations about race and power.

Prioritize Racial Justice in Grantmaking and Move Beyond Race-Neutral Language

More and more foundations are discussing structural racism and the dynamics of power and privilege in ways they never have before. Moving away from race-neutral language is a critical first

step, but it can also be a difficult one in a sector shaped and built on a legacy of white supremacy.

For the Irvine Foundation, equity has always implicitly been embedded in its North Star, which seeks to ensure all low-wage workers have the power to advance economically. In California, people of color have been disproportionately impacted by the pandemic and economic crisis, and make up a large share of the low-wage workforce, including front-line workers in health care, elder and child care, and food service and delivery. As one leader at the foundation reflected,

We had not made it explicit as a headline before ..., but the pandemic and then the murders of George Floyd, Ahmaud Arbery, and Breonna Taylor highlighted what has always been true. Structural racism is a substantive impediment to economic advancement and economic opportunity in California and the nation.

Since 2020, the Irvine Foundation has clarified that it cannot advance equity by funding in race-neutral ways. Instead, it now explicitly names structural racism as well as “support [for] solutions that intentionally repair the harm done by racist policies of the past” (Fields, 2021, para. 10). Irvine has also incorporated the diverse perspectives of staff and grantees in the articulation of its racial equity statement and has strengthened its practice of engaging internal and external voices in the design of new funding priorities and initiatives. For example, in 2021 the foundation convened grantees to ideate and refine the language, strategies, and measures of progress for Just Prosperity, a new statewide policy and systems-change initiative.

The Endowment has prioritized racial equity in its grantmaking for many years by supporting power-building efforts, particularly through its place-based Building Healthy Communities initiative. That said, the events of 2020 became a clarion call to deeply examine how racial equity is reflected in its grantmaking and operations internally. As part of its commitment to greater transparency and accountability (both internally and externally), TCE examined and publicly shared an assessment of its grantmaking support for BIPOC-led organizations. While the assessment revealed that support for these organizations is trending upward, it also acknowledged areas in need of improvement (TCE, 2020a). The Endowment took initial steps to operationalize racial equity internally, starting with the creation of the Advancing Racial Equity cross-departmental working group and a new director for advancing racial equity that reports directly to the CEO (TCE, 2020b). As one leader noted, “a strong commitment to racial justice and equitable outcomes for all people requires constant self-examination and interrogation of our own patterns and tendencies in philanthropy.”

As foundations explore how they talk about equity, it’s important to clarify whether they are seeking to achieve racial equity or racial justice. In the recent report by the Philanthropic Initiative for Racial Equity, *Mismatched: Philanthropy’s Response to the Call for Racial*

Justice, the authors define racial equity as “improved outcomes within existing systems,” whereas funding for racial justice focuses on “building community power to fight for deep transformation of major systems” (Devich Cyril et al., 2021, p. 8). Data gathered by Candid reveals that most philanthropic funding has focused on reducing disparities — that is, equity — by increasing opportunities and meeting short-term needs rather than long-term movement building, systems change, or grassroots organizing — that is, justice. While data indicate a steady rise in foundation funding for racial equity between 2011 and 2018, only 6 cents of every philanthropic dollar was devoted to racial equity and 1 cent to racial justice (Devich Cyril et al., 2021). Despite a funding surge in 2020, the sector has a long way to go to translate commitment into transformative change.

Focus on Long-Term Capacity and Structural Change

While rapid-response grantmaking is critical in crisis situations, creating lasting change requires an intentional approach. Once Irvine and TCE put an immediate COVID response in place, both foundations turned attention to longer-term goals and sustainability funding driven by their strategic visions.

In 2019, the Irvine Foundation had been anticipating a potential recession and was in the planning phase of the Recession Readiness Project to help grantee organizations financially prepare for a potential economic downturn. When the pandemic hit, the foundation accelerated this work as economic crisis loomed. Through what is now referred to as the Recession Resilience Project, the foundation swiftly provided its 62 core grantees with \$25,000 emergency grants that required no formal request or paperwork. “They didn’t even know it was coming,” a foundation leader said. “We just wanted to support them because we knew that all the organizations were going to have to pivot their operations.”

Irvine then launched a second phase of flexible funding to support longer-term financial resilience. All 62 grantees were eligible for

FIGURE 3 TCE's Guiding Principles for COVID-19 Grantmaking**The Endowment's COVID-19 Grantmaking Principles and Priorities**

- Prioritize populations left out of federal/state/local recovery efforts while advancing racial equity
- Prioritize Central Valley and Inland Region
- Balance short term emergency needs with longer term opportunities and post-2020 goals
- Leverage federal and state resources
- Use intermediaries to reach broad constituencies
- Focus on nonprofit sustainability
- Engage staff from across foundation

additional grants to support self-identified needs, including seeding or rebuilding operating reserves, hiring additional staff to support revenue strategies, investing in technology or training to improve financial operations, and strengthening other types of organizational capacity. Irvine also provided technical assistance in financial health for nonprofits. In total, it invested \$18 million to support core grantees without formal proposals or arbitrary deadlines. Grants were identified through coaching conversations to address needs, with no onerous submission or reporting requirements.

In June 2020, Irvine's board also made a \$20 million commitment to advance and embed racial equity in its operations and investments. This financial commitment has supported the Racial Equity Project to expand investments in BIPOC leaders and prioritize those most impacted by structural racism. Further, the foundation doubled down on efforts to center the voices of BIPOC communities through power building of low-wage BIPOC workers as well as transformative economic justice policy and systems-change efforts led by BIPOC leaders and allies.

The California Endowment initially responded to the pandemic with a \$5 million allocation to support public health efforts and immediate needs of vulnerable Californians, including farm workers, day laborers, people experiencing homelessness, and undocumented individuals

— funding that relied heavily on intermediary partners and was processed in a matter of days. The Endowment then launched further grantmaking to provide ongoing support with a longer-range focus on building resilience and rapid-response capacity among grantee organizations, nurturing intermediary partners to strengthen their reach, and supporting impacted communities. (See Figure 3.) In a recent interview one TCE regrantee intermediary shared that it had made it “clear” that “we need sustained giving. Not just in moments of urgencies, because it’s always urgent for our communities. All of the time, there needs to be an understanding of the long term.”

The Endowment's COVID-19 grantmaking process provided fertile ground for testing and learning about ways to infuse racial equity into grantmaking. It sought to support communities with short-term-response funding for direct services through emergency relief as well as longer-term power-building goals. It also developed a set of racial justice recommendations to apply to the second round of grantmaking. Specifically, TCE sought to bolster power-building ecosystems and movements and sharpen racial justice analysis. It also actively used its platforms to amplify messages from grassroots power-building groups and promote communications about anti-Asian racism.

Endowment staff involved in the grantmaking process said the funding criteria and principles

prompted deeper dialogue and analysis about how to equitably support impacted populations who were left out of other relief efforts, such as farmworkers and the undocumented. They also leaned into the on-the-ground knowledge of program managers and coordinated with other grantmakers. These efforts paved the way to support organizations seeking to advance more equitable outcomes. By February 2021, over \$27 million had been disbursed across 124 grants.

Embed Equity in Evaluation and Continuous Learning

Embedding equity into organizational learning and evaluation is a fieldwide effort that has gained considerable momentum through the Equitable Evaluation Initiative (EEI, 2019). Both Irvine and TCE have a history of investing in learning, evaluation, and the inclusion of diverse voices and perspectives. However, putting that into practice — particularly during times of crisis — is challenging.

Engage R+D conducted developmental evaluations of early rapid-response funds for both funders, including TCE's Fight4All Fund and Irvine's Protecting Immigrant Rights (PIR). The findings helped to strengthen their response to the events of 2020. One key finding underscored the critical importance of foundations working together to share field knowledge and coordinate the distribution of resources. Irvine leveraged insights from the PIR experience and tapped into relationships with other funders to share due diligence and information on grantees. These practices and relationships helped expedite grants and ensure better coordination with other foundations to minimize burden on nonprofits.

The foundation also leveraged confidential feedback on the impact of COVID-19 from the Grantee Perception Survey, regularly conducted by the Center for Effective Philanthropy (CEP) to complement informal conversations with grantees. Irvine also engaged a grantee advisory group (started several years earlier as part of its Better Careers Initiative to inform all phases of evaluation, from codesign and collective sensemaking to using evaluative insights for improvement and decision-making). This group

became a critical partner when the pandemic hit, helping the initiative staff identify COVID-related learning questions and make sense of findings and implications.

The Endowment's evaluation of its Fight4All Fund and COVID-19 response intentionally turned a critical eye to internal practices and the ways it leverages its platforms, position, and influence to advance its North Star. The COVID-19 evaluation engaged an internal advisory group of staff across departments and functions who provided ongoing guidance and reflected on emerging insights and implications for TCE's work. Foundations typically focus on grantees' challenges and achievements, rarely examining how their own practices, structures, and cultural norms advance or undermine equity goals. The Endowment's willingness to ask itself difficult questions and check its internal assumptions has been a critical step in its journey.

A Deeper Dive: Reimagining Processes and Structures

Gaining clarity about how to operationalize equity — as well as the structural barriers that get in the way — is where more challenging and fundamental work begins. While foundations differ, the rapidly changing landscape reveals that they are generally not engineered or well-equipped to center equity, particularly in rapid-response and emergency grantmaking. Foundations are structured and guided by default settings that may not optimally fit today's complex challenges and may undermine efforts to advance equity (Monitor Institute, 2021). Some, like the Endowment and Irvine, have been piloting cross-functional teams to foster collaboration and break down internal silos. They are also intentionally aligning and clarifying how racial equity principles are put into practice across the organization.

Clarify the "Why" and Unite Around Shared Goals

Explicitly linking a foundation's internal equity practices to its external work can help unify staff around shared goals. The Irvine Foundation has seen benefits of deliberately engaging its staff

in racial equity reflection that ties the foundation's external goals to its internal practices. Specifically, Irvine has coalesced all staff and board members in a learning journey to engage in a deeper analysis of racial equity. Recognizing that everyone enters the journey in different places, they are importantly moving toward a shared goal. As an Irvine leader noted,

It has been powerful because everyone is involved. For some staff, there are a lot of "aha" moments. For others, not so much. And for some, there is frustration that we aren't getting to action faster. However, the learning journey is getting everyone to a similar place.

Another critical step in Irvine's journey has been the development of a racial equity case statement informed by feedback from partners and grantees (Howard, 2022). Irvine has had a practice of actively listening to grantees and impacted communities to inform their strategies and grantmaking priorities. Now, it is engaging staff and partners to articulate what it means to be an antiracist organization and operationalize racial equity across the organization. They are asking critical questions about how and to whom they hold themselves accountable for advancing equity goals. One Irvine leader reflected that while many existing practices aligned with racial equity principles,

we did not necessarily link those to advancing racial equity. We just felt they were good practices. But there is a difference because when we link it to advancing racial equity, it means we're linking it to an analysis about the role structural racism has historically played. ... It's easier to change the practice than it is to come to consensus and agreement on the analysis that undergirds that practice. If you don't tie the why to the practice change, the practice change won't stick.

Shift Internal Structures and Capacity to Foster Collaboration and Inclusion

Enabling better flow of ideas across internal silos, lifting up diverse experiences and perspectives, and sharing decision-making power across staff are equity-driven practices that organizational structures can facilitate or hinder. Both the Irvine Foundation and TCE are examining

Explicitly linking a foundation's internal equity practices to its external work can help unify staff around shared goals. The Irvine Foundation has seen benefits of deliberately engaging its staff in racial equity reflection that ties the foundation's external goals to its internal practices.

their organizational structures and making changes to foster staff collaboration, inclusiveness, and capacity to address equity.

The Endowment is seeking to address structural silos that hinder collaboration by experimenting with a team-based approach to grantmaking. It initially piloted this approach with the Fight4All rapid-response fund, launched in 2016, and carried it forward with COVID grantmaking. The team-based approach brought together staff representing different functions and departments, including program staff, grants management, communications, and legal affairs. Teams were formed around four funding priorities and met regularly to review COVID grants.

One key benefit of a cross-function, team-based approach is the inclusion of diverse perspectives. The Endowment's COVID work group sought to infuse deeper analysis and dialogue about racial equity and long-term systems goals into their deliberation. Success factors included the clear articulation of purpose, guidelines and templates, and a facilitative leadership style to ensure a collaborative and inclusive process. One important reflection was the need to build muscle for internal collaboration and trust among staff who had never worked together before. At times, the sense of urgency did not provide conditions for trust building. Making

In the same way that it's critical to move away from race-neutral language, organizations must be willing to name and unpack the oft-unspoken dominant norms that perpetuate the status quo.

time to cultivate internal relationships and trust can translate into more effective teams and trust-based grantmaking.

The Irvine Foundation is also reflecting on internal structures and capacity as it leans into new ways of working. The CEP's annual survey revealed that Irvine grantees were looking for closer connection and engagement with foundation staff. "Ultimately, what was limiting us in doing that was staff capacity," a senior leader commented. "For us to be able to advance racial equity, our touch and engagement with organizations has to be much greater than what we have the capacity to do now." As a result, the foundation is expanding staff capacity and exploring ways to center relationships with existing grantees. It is also prioritizing staff spending more time in the field supporting smaller BIPOC-led organizations that are often overlooked and underresourced.

Another important consideration in building structures and capacity to advance equity is the diversity of staff and who sits at the various decision-making tables. A 2019 Irvine-sponsored study on evaluators of color working in and with foundations surfaced critical insights on this issue. Their ideas, for example, around advancing diversity, equity, and inclusion (DEI) throughout the career life cycle can readily assist foundations in shifting their practices to better build and support a diverse staff throughout the philanthropic enterprise (Engage R+D, 2020b).

The Base of the Iceberg: Transforming Cultural Norms and Mindsets

"Without a consistent and universal application of a racial equity lens on our process and practices, there is a risk that we will default to an approach that is not aligned with our values. The risk is not only a missed opportunity to shift internal practice and culture toward racial justice, but it will result in less efficiency in moving the resources to those who need them most."

– TCE internal memo, April 2020

The deepest and often most difficult space is the base of the iceberg where mindsets, institutional norms, and organizational culture — the foundation for everything above — can either facilitate or hinder efforts to advance transformative change. We highlight three important themes that reflect a general challenge across the sector: fostering a culture of trust and transparency, supporting radical care and healing, and democratizing decision-making.

Foster a Culture of Trust and Transparency

This time of crisis has underscored the importance of trust and transparency between funders and grantees as well as within organizations (Avery et al., 2020). In the same way that it's critical to move away from race-neutral language, organizations must be willing to name and unpack the oft-unspoken dominant norms that perpetuate the status quo.

At both the Endowment and Irvine, staff noted that the urgency to act swiftly in response to COVID left little time for people who had never worked together to develop trust and rapport. Although urgency was indeed real, Irvine staff also cited a general lack of time to build relationships in an action-driven culture focused on efficiency and productivity. A leader at the Irvine Foundation acknowledged, "the culture of philanthropy and the sector has an over busyness to it — to accomplish as much as you can and get the most out of every minute." For a sector and society that places higher value on productivity than building trusting relationships, slowing

down and valuing relationships can be a sea change for both internal and external work. In the words of one Irvine leader, “racial equity work is a change process that is never really done. We need to intentionally and actively slow down and be in conversation with people.” That often means reassessing priorities and being willing to take some streams of work off the table to make time and space for deeper equity discussion and trust building.

In 2020, the Irvine Foundation formed a racial equity advisory committee comprising board members and staff from different departments and positions. While the leadership team engages with the board on a regular basis, this was the first time staff from across the organization had an opportunity to build relationships, discuss racial equity considerations, share personal stories, and play an advisory role to inform the foundation’s overall work. By design, everyone on the staff–board committee has an equal seat at the table.

Support Radical Care and Healing

Uncertainty, stress, and collective grief in the last several years has taken a toll on everyone. Staff at both foundations underscored the importance of healing — in BIPOC communities, with grantee partners, and inside foundation walls. They encouraged foundations to counteract the “busyness” culture by creating space and conditions to model what it means to center healing, recovery, and repair both internally and externally. One Irvine foundation leader noted, “there may have been instances in the past where people felt something did not advance racial equity and it may have impacted them personally or impacted the community in negative ways.”

Similarly, Endowment staff expressed the need to streamline processes and create “healing spaces” both within the foundation and in communities they serve. They emphasized the need to reflect on emotional labor of grantees as well as staff, particularly those who are BIPOC. Efforts to minimize burdens on grantees often shifted those burdens to staff as they tried to move grants through internal systems ill-suited to the urgency of the moment. This process demanded

emotional labor from staff while they, too, were personally impacted by the events of 2020.

Organizations can intentionally cultivate a culture of well-being. The Irvine Foundation’s DEI advisory committee, formed in 2016, hosted spaces in 2020 for staff to decompress, connect, be in community, and show up as their authentic selves, especially after particularly challenging events. The foundation also started conducting quarterly surveys to check how staff were navigating uncertain times while working virtually, helping leadership respond to evolving needs. Irvine established additional paid time off for staff who needed to care for loved ones during the pandemic and launched routine virtual activities, including yoga, fitness challenges, and cooking classes. The foundation also sought to shift working norms and focus on well-being by blocking off Monday mornings and Friday afternoons as “meeting free” zones. Externally, the foundation conducted a landscape assessment to understand how to support healing for grantee partners and the communities they serve. These efforts are works in progress, but aim to center people over productivity by actively cultivating a culture of trust and care. Still, discipline and intentionality will be critical to maintain momentum and prevent backslides into old ways of doing and being. Both foundations acknowledge they would like to do more to support healing among grantees and movement leaders.

Democratize and Distribute Decision-Making

Discussions about how foundations wield and yield power have intensified in recent years (Ranghelli et al., 2018). Building the power of communities that have been historically marginalized from decision-making tables is integral to grantmaking approaches at both the Endowment and Irvine. But what does it mean to shift decision-making power within foundations? A recent study funded by the Council of Foundations and Philanthropy California suggests most foundations are changing processes for grantees, but few are making internal shifts to delegate more decision-making responsibility to program staff. When asked how foundations are changing processes for new grants

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in response to COVID, only 17% of the 208 respondents reported delegating grant decisions to program officers (Haymon, 2020). What might it look like to distribute decision-making and entrust internal teams to use field knowledge and criteria to make grant decisions? Furthermore, how can we learn from emerging models of participatory grantmaking to shift power and decision-making to community partners?

Trust-based philanthropy and participatory grantmaking approaches offer a helpful source of guidance. Participatory grantmaking goes beyond seeking feedback from affected communities by shifting decision-making about money to people most affected by the issues in ways that increase agency and leadership (Gibson, 2019). Externally, participatory grantmaking may engage community peers in setting funding priorities, while internally, it may include encouraging collaboration across programs and involving staff from all ranks in policy discussions (Gibson, 2019). Critically, participatory grantmaking isn't "a tactic or a one-off strategy; it is a power-shifting ethos that cuts across every aspect of the institution's activities, policies, programs and behaviors" (Gibson, 2019, para. 21).

Lack of clarity about roles and decision-making is a pain point for many organizations. A survey of TCE's COVID grantmaking team revealed that approximately half its members felt the decision-making process was not always clear

or efficient. Some staff also called for more decision-making autonomy without multiple slow layers of review. One work group member suggested in retrospect that a more equity-driven process would have simply added money to existing grants and trusted those proximate to impacted communities to use the funds well.

The Irvine Foundation has also grappled with this issue. In response to confidential staff survey feedback about decision-making transparency several years ago, the foundation formed an internal working group to develop a decision-making framework with guiding principles and clear parameters about who and how different people contribute to decisions. The framework's implementation has helped to hold leadership more accountable by articulating what decisions will be made and involving those who will be impacted by decisions. It has also led to deeper conversations about opportunities for more shared decision-making and power within the foundation.

Further Explorations

The speed and agility of philanthropy's response to crises is critical, but little will fundamentally change without a deep examination of how foundations operate and contribute to — or hinder — equity and transformative change. The iceberg model can support organizational and field-level reflection and action. The eight explorations described in this article are an initial attempt to identify some deliberate areas of work, based on the experience of two foundations seeking to operationalize equity. We encourage further explorations that go even deeper, with openness to questions that arise through initial deep dives and as the larger equity movement evolves. Interest is growing, for example, in examining the origins of philanthropic money and how foundations can shift resources and power to pursue equity.

If the COVID-19 pandemic has taught us anything, it's how interconnected and interdependent we are. There is shared recognition that we face a future of uncertainty and ongoing threats to the health and well-being of communities worldwide. Pausing to reflect and build

upon the lessons of the last several years can help the philanthropic sector better prepare for future crises and avoid past mistakes and short-sighted responses that only serve to perpetuate broken systems and the status quo. The extent to which the philanthropic sector leverages this “portal moment” for transformative change is yet to be seen, but we remain hopeful.

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