



***Becoming A Catalyst
For Social Justice***

***A Tool For Aligning Internal
Operations To Produce Progress***

*Moving Philanthropy Closer
to Racial Equality and Social Justice*

By

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MOVING PHILANTHROPY CLOSER TO RACIAL EQUITY AND SOCIAL JUSTICE

Working Drafts of Tools to Assist Progress

Introduction and Overview to Three Tools to Assist Progress

By Steven E. Mayer, Ph.D., Vanessa McKendall Stephens, Ph.D., and Betty Emarita

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Moving Past the Silence: A Tool for Negotiating Reflective Conversations About Race

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Becoming a Catalyst for Social Justice: A Tool for Aligning Internal Operations to Produce Progress

By Betty Emarita

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By Steven E. Mayer, Ph.D.

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BECOMING A CATALYST FOR SOCIAL JUSTICE: A TOOL FOR ALIGNING INTERNAL OPERATIONS TO PRODUCE PROGRESS

One of three tools from
Moving Philanthropy Closer to Racial Equity and Social Justice
Effective Communities, LLC

By
Betty Emarita

Purpose

This tool will help philanthropic organizations become more intentional catalysts for social justice. It is designed to align values, intent and internal processes in order to generate progress. The term *social justice* refers to repairing underlying structures and root causes that create or support the persistent inequalities or gaps usually found between Whites and other racial populations.

Who Can Use This Tool

The boards and staff of all philanthropic organizations, including foundations, intermediaries and nonprofits, can make use of the tool.

Description

The tool consists of questions that are grouped into three action areas:

- Action Area 1. Clarify values on social justice and align practices with values.
- Action Area 2. Become a learning organization to better understand social justice issues.
- Action Area 3. Develop strategies to expand the impact of social justice activities.

Included in each set of questions is an example of how a fictional philanthropic organization uses the questions to change some of its internal processes and increase the impact of its activities on root causes.

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Instructions: Using the Tool

This tool is a template designed to be excerpted and embedded into new or existing operational processes, such as strategic planning, board and staff retreats, organizational evaluations and assessments, and staff performance reviews. Within each action area, specific questions are addressed to board members and staff. There are also questions related to utilizing consultants and contractors. The action areas can be addressed one at a time or in combination.

Steps to embed action area template(s) into a strategic plan

1. Engage an external consultant or team who understands philanthropic organizations, as well as structures and nuances in diverse communities, and who can facilitate an in-depth planning process effectively.
2. Form a committee that represents a diagonal slice of the organization.
3. Decide where each question belongs in the strategic-planning instrument.
4. Engage the board and staff in answering each question as appropriate.
5. Synthesize the results, discuss with the board and staff for broad buy-in, and fine tune the results in response to this discussion.
6. Identify benchmarks, assign completion dates and designate who is responsible for implementing the required actions.

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Action Area 1: Clarify values on social justice and align practices with values.

Most philanthropic organizations are focused on closing gaps of some sort. Well-meaning efforts often miss their mark, however, because operational practices are not aligned with values addressing root causes of the issue. This structural focus on addressing root causes is what separates social justice from short-term acts of charity. In fact, there may not be a clear understanding among board or staff members on the distinction between social justice and charity, or even agreement upon the distinction's significance.

Once there is clear understanding, board and staff can see how a focus on social

justice affects their goals. They can then clarify what organizational values address root causes in each of their focus areas. With such clarity, board and staff can see whether their operational processes directly support their values.

Operational practices include administration, strategic planning, staff and board development, performance reviews, investments, donor relationships and the design, implementation and evaluation of funding initiatives. Are these operational processes consistent with the organization's values around root causes? Do they support the values, ignore or counteract them?

Action Area 1 Template

Board	<ul style="list-style-type: none"> ▪ How does your organization deal with structural inequities or root causes in its areas of focus? ▪ What values does your organization support, and what structural challenges are inherent in them? ▪ Are these values and the structural concepts incorporated in them reflected in the strategic plan? ▪ In what ways are the values and the structural concepts incorporated in them articulated to board, staff and donors, and by whom? ▪ What is the plan for permeating those values and structural concepts throughout the organization?
Staff	<ul style="list-style-type: none"> ▪ How does staff in every department incorporate these values into their work? ▪ How is staff recognized and rewarded for addressing the structural issues that challenge the values? ▪ In what ways are values incorporating social justice concepts aligned across departments to create synergy and maximize impact? ▪ In what ways is leadership around social justice informed, cultivated, supported and nurtured?
Consultants and Contractors	<ul style="list-style-type: none"> ▪ What criteria will you use for choosing consultants, who understand structural issues from diverse perspectives, so they can help you align values and practices? ▪ How will you search for them?

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Example of how responses to Action Area 1 questions can be used in operational processes

The Orange Foundation has three focus areas: community economic development, early education and adolescent health. It wants to address the root causes and structural issues that produce and maintain inequities in these areas in minority communities.

The executive director, with the support of the board chair and executive committee, proposes to the full board that addressing root causes should be part of their strategic plan, along with building capacity in board and staff to implement and communicate the commitment to donors. The board agrees and engages a consulting company with a small multi-ethnic team to assist them.

The consultant team helps the foundation form a committee to identify and prioritize goals for structural issues associated with the areas of funding and to embed the goals into the strategic plan. The committee represents a diagonal slice of the foundation so that goals and information about the process can resonate across departments and levels.

The executive director, with assistance from the consultant team, offers special recognition to the participants on the committee and creates opportunities for them to enhance their skills.

All staff members are asked to reflect some aspects of the structural goals in their individual plans.

The consultant team facilitates dialogue about structural goals across departments to identify synergies. The results of the conversations about the structural goals are synthesized and incorporated into background information given to other consultants and contractors, including the types of deliverables that are expected. This introduces new elements into the chemistry of the organization and helps the organization create a new sense of itself and its role.

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Action Area 2: Become a learning organization to better understand social justice issues.

To design initiatives effectively, philanthropic organizations need to better understand economic and social structures, both in the larger culture and in the diverse communities served by their grantees. This broad understanding cannot be generated by relying primarily upon universities, which are struggling with their own issues related to diversity. A narrow range of ethnically homogeneous consultants also will not generate the necessary understanding. New sources of information are required to become a learning

organization and deepen internal understanding of social justice issues.

Fortunately, philanthropic initiatives have helped to grow an array of diverse, highly effective nonprofit organizations whose staffs can contribute extensively to the learnings of other organizations. In addition, there are many consultants of color with rich experiences and networks who can significantly enhance organizational learning.

Action Area 2 Template

Board	<ul style="list-style-type: none"> ▪ What strategies will you use to get a clear, “big picture” view of structural and systemic root causes? ▪ How will you start an internal conversation about root causes? ▪ In what ways will you create opportunities for experiential learning and personal transformation? ▪ In what ways will you adapt governance and practice in response to what you learn? ▪ What strategies will you use to enable board and staff to learn from and with each other? ▪ What strategies will you use to incorporate new board members into the conversation about social justice?
Staff	<ul style="list-style-type: none"> ▪ What strategies will you use to get a clear, “big picture” view of structural and systemic economic and social issues? How will you communicate this information to donors? ▪ In what ways will you create opportunities for experiential learning and personal transformation? ▪ What strategies will you use to enable board and staff members to learn from and with each other? ▪ In what ways will you create learning opportunities for donors? ▪ In what ways will you adapt institutional processes and practices in response to what you learn? ▪ What strategies will you use to broaden and deepen the range of information available to you?
Consultants and Contractors	<ul style="list-style-type: none"> ▪ How will you use consultants/contractors to help you become a learning organization? ▪ What strategies will you use to engage a more diverse pool of consultants and contractors to bring broader perspectives and more varied experiences?

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Example of how responses to Action Area 2 questions can be used in operational processes

The Orange Foundation board chair, executive committee and executive director decide that the board needs to be better informed about the structural issues that create and maintain inequities. With assistance from the consulting team, they identify three sources of information: a regional policy think-tank, researchers/academicians from the state university, and diverse nonprofit executive directors and senior staff who have state and national recognition.

These sources are chosen because they have very different styles, approaches and points of emphasis. These differences provide a variety of entry points for a board whose members are not convinced that the foundation should focus on structural issues.

The consultant team helps plan the agenda for three learning events. The first is so effective that the board decides to invite staff and interested donors to the next two events. An evaluation at the end of each learning event helps the consultants refine the agenda for the next.

Most board members have never interacted as peers with nonprofit senior management from diverse ethnic backgrounds. They are surprised to discover so many gaps in their understanding as board members. They are equally astounded to see how much more the board, staff and donors are able to understand when the three perspectives are presented together.

Some of the nonprofit executive directors invite foundation board members, donors and staff to visit the communities they serve and meet some of their constituents. The consultants arrange such a visit to communities in a rural area for a subset of the donors, board members and two staff members—a program officer and the development officer. A lively discussion develops on the bus ride.

At the next staff meeting, the development officer asks whether the overhead formula used to evaluate grant application is fair for rural grantees. The program officer asks whether the budget analysis used to evaluate grant applicants serving immigrant communities takes into consideration some of their higher costs. The staff decides to review their assumptions about cost structures and to make recommendations to the board.

After a year of learning opportunities, reflective internal discussions and more interaction between board and staff members, a strong consensus develops that the foundation should use more diverse consultants who are knowledgeable about structural issues in ethnic communities and who bring broader perspectives. The board begins to recruit more minority members, and the administrative staff begins to use more minority vendors.

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Action Area 3: Develop strategies to expand the impact of social justice initiatives.

Challenges related to social justice are difficult and entrenched. Few philanthropic organizations can effectively tackle them alone. Through their power to convene and collaborate, however, philanthropic organizations can create and sustain powerful networks. With these networks, organizations can increase and better target resources, broker relationships, enlist media, and educate the public.

Effective collaboration creates synergy. Engaging in peer discussions or contracting with nonprofit leaders who have a strong track record of effectiveness can both expand and deepen the impact of collaborative action. The committee structures of regional and national philanthropic organizations also can be cultivated as important allies.

Action Area 3 Template

Board	<ul style="list-style-type: none"> ▪ What strategies will you use to leverage the impact of initiatives related to social justice? ▪ How will your organization embed social justice issues in more of its activities? ▪ What criteria will you use for setting priorities that will make the most progress? ▪ In what ways will you use media and formal and informal networking opportunities to influence public education and opinion?
Staff	<ul style="list-style-type: none"> ▪ What strategies will you use to develop regional and national philanthropic organizations as allies? ▪ In what ways will you leverage your impact by collaborating with other philanthropic organizations? ▪ What strategies will you use to learn from and promote the expertise of successful grantees? ▪ What strategies will you use to strengthen grantees that have been successful over time and generate pathways by which they can play more significant roles?
Consultants and Contractors	<ul style="list-style-type: none"> ▪ How can you use diverse consultants and contractors to spread your learnings about social justice and the impact of your activities? ▪ How will you document and evaluate your process?

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Example of how responses to Action Area 3 questions can be used in operational processes

Now that the Orange Foundation has become a learning organization and has significantly increased its understanding of structural issues, the board has asked the staff to experiment with designing program initiatives and grantmaking strategies that can leverage and reinforce each other.

The staff begins to explore how community economic development and adolescent health might reinforce each other. The staff decides the foundation could make public health agencies aware of the successes of some of the grantees and create a forum for exploring partnerships. They also decide to invite local school administrators to participate in the conversation, because school cafeterias are major consumers.

The board is delighted with the staff recommendations. The board decides to use the connections its members have with health insurance companies and with media to generate more support and to raise public awareness.

The effectiveness of one of the nonprofit organizations is a decisive factor in convincing an insurance company to become a full partner in the initiative. The nonprofit has been in existence for more than 20 years and has an impressive track record. Its executive director has a wealth of knowledge and experience in generating models, spinning off other nonprofits and serving as a surrogate public agency to the diverse populations the insurance company wants to reach.

The board decides that it needs to develop new funding strategies to institutionalize such nonprofits. Their growth and development issues and needs are different from younger, less established nonprofits, while their knowledge assets are significant and can serve as a source of income. The board votes to hire consultants with the knowledge and skill sets for funding strategies that will be more appropriate.

The Orange Foundation board and staff are amazed at how much more impact their funding is having as their understanding of structural issues has increased. They are now working on ways to share their learnings with colleagues in regional and national philanthropic organizations. A proposal has been submitted for a panel presentation at the annual meeting of National Council of Community Foundations, and they are in the process of publishing a toolkit for new board members.