



# The Racial Equity Leadership Imperative

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MEETING REPORT

3-4 JUNE 2019

# Executive Summary

The Presidents' Forum on Racial Equity in Philanthropy (the Forum) has a goal of creating intimate spaces where foundation presidents and CEOs can grapple with racial equity leadership dilemmas and, through peer-to-peer conversations, seek solutions. Over two days in June 2019, a third convening of the Forum was held in Montgomery, Alabama. The meeting included an afternoon spent at the Equal Justice Initiative's Legacy Museum, which captures the arc of U.S. history from enslavement through mass incarceration and is located in a former warehouse that housed enslaved people. The visit also included spending time at the National Memorial for Peace and Justice, which honors the victims of lynching in the U.S. and has been called "a sacred space for truth-telling and reflection about racial terror in America and its legacy."

Using a peer consultancy model, the group of 11 foundation presidents worked in pairs and small groups on issues specific to their organizations. Additionally, the presidents and CEOs shared their own racial histories and built deeper personal connections through facilitated dialogue. It was unusual for Forum events in that all of the participants in this session identified as non-Hispanic white, with nine men and two women. At the end of the Forum, participants expressed appreciation for connecting with their peers, deepening their own racial equity learning, and working on issues they face in their organizations in a unique historical city and with peers who are facing similar challenges. One participant said, "The direct experience of visiting the memorial and being in guided conversation was powerful."

## **JUNE 2019 MEETING: OVERVIEW AND REFLECTIONS**

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The third Forum was held June 3-4, 2019, in Montgomery, Alabama, and included visiting the [Equal Justice Initiative's Legacy Museum and National Memorial for Peace and Justice](#). Eleven foundation presidents and CEOs participated, representing organizations ranging from a family foundation to a progressive state-level foundation to a national foundation. The majority of the group identified as non-Hispanic white males; two non-Hispanic white females participated.

The presidents spent much of their time engaging in a peer consultancy model by forming pairs and small groups for focused conversations. One small-group session discussed the difficulty of leading with a racial equity lens from the personal, interpersonal, systemic, and cultural levels. In the report-out of the conversation, one member said, "...it weighs heavily - the responsibility of leading - having clarity on DEI for where the organization is going... There is no craft that we are exposed to showing us how to do so, without causing damage." One president offered, "Having equity goals without an equity culture at the organization doesn't work." Another stated, "Sometimes we backpedal to find common ground; going fast and going slow is needed. Or sometimes you have to ask 'or do we need to do different

kinds of work altogether?” One comment summed up the challenge of the racial equity leadership imperative: “What does leading the right-sized racial equity process look like? Staging matters – the pace and the depth. We need to define depth of work and results.”

Attendees spent time talking to each other about their own racial histories, discovering similarities and differences. From one paired conversation, one president said, “We both had a sense of being outsiders, and that made it seem obvious to us that we both needed to pay special attention to difference. And that blinded me to the idea that I wasn’t seeing all kinds of differences and that I was swimming in that water of privilege, too.”

Event facilitators asked presidents to share their earliest racial memory. For many, this experience didn’t happen until high school or college. One president said, “I was embarrassed at how little contact I had with people from other races” while growing up in a white suburban community. The group discussed why understanding their racially situated history matters to their leadership around these issues. Having a story and not having a story around race and racial equity are both important to consider in examining one’s personal narrative and how it may impact one’s work.

To situate the participants in the historic and current racial issues of Alabama, Keecha Harris and Associates, Inc. (KHA) convened a panel to discuss the dominant culture, in which whiteness still remains centered statewide. Three individuals offered their perspectives: Dr. Bob Corley, retired professor at the University of Alabama at Birmingham; Felecia Lucky, president of the Black Belt Community Foundation; and Isabel Watkins Rubio, executive director of the Hispanic Interest Coalition of Alabama.

“Whiteness persists because that is the way things are organized and structured, and it has been that way in Alabama since the end of Reconstruction, where politics and economics were used to create a systemic way that whiteness can prevail,” Corley said. He said the 1901 state constitution’s whole purpose was to create white supremacy in Alabama “by any legal means possible.” Rubio reminded the audience that the Spanish were the first colonial people to settle in Alabama, after the First People, something that is often forgotten.

In the context of the Black Belt Community Foundation’s focus on narrative change, the panelists surfaced the theme of hidden histories and untold stories. Corley described discovering through his research that his great-grandfather was a “catcher” of blacks accused of menial crimes. They were arrested, convicted, and sold to plantations as laborers. Though Corley’s grandfather was convicted and fined \$1,000, a significant sum for the time, this story was never told by family members. Lucky agreed, saying, “A lot of stories aren’t told, but it doesn’t mean they didn’t happen.”

After the panel discussion, the group spent time at both the Equal Justice Initiative Legacy Museum and then the National Memorial for Peace and Justice. Somber reflections from participants included feeling “soul-crushed and really angry at the level of hatred and the capacity of human beings to destroy each other.” Three participants said they had already emailed their staff and told them to come to the museum and memorial. Another said, “I

can't stop thinking about the faces at the lynchings – the crowds there, and the person being lynched – did they imagine that they would be a photo at a museum someday? That something beyond their last breath would come out of this?"

Another attendee said, "I don't fully understand white supremacy and don't fully know how to combat it or its roles in systems and laws that results in the policies. Telling history and ripping the veil off of white supremacy is key."

One president reflected, "What am I going to do a month from now, a year from now, to remember this experience and the discomfort I felt?" Another president shared, "[After visiting the museum and the memorial], I was struck by the lack of accountability. Why did this end? And how did it end? And are we sure that we're done with it?"

The memorial evoked another feeling in one participant, who said, "The commemoration of these people's lives had the ability to give hope.... It is a discipline that does not allow our humanity to atrophy. Something in our human spirit ... and allowing it to transform us. I refuse to let the hope of those lives go."

Drawing connections to the work of foundations, the group outlined a series of questions that they brought to small-group discussions, including:

- Who has or gets a voice?
- How do we bring along the board and staff?
- Do I have clarity about the problems we're trying to solve?
- Are we spending our money in the right places?
- What is causing the problems we want to solve? How does race figure in?
- What are the connections in the U.S. to racial history? What are the implications (e.g., why are \_\_\_\_\_ concentrated where they are?)?
- How do we train people?
- How do we recruit?
- How do we build more racial justice imagination into the work?

Participants talked about what they needed to keep in mind in this work:

- We are all struggling.
- There is a need for power-building and power-sharing.
- We must face the tension of leading versus being responsive to community leadership.

The group expressed gratitude for the ability to attend the Forum as a group of learners. Thoughts ranged from "Being on the path – one step forward, one step in a hole" to "I keep bringing myself into this room with the conviction that I can be a better person and a better leader." One participant said, "I feel invigorated."

## NEXT STEPS

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The larger group outlined several possible next steps they may take at their foundations. One small group of participants saw the challenge as large: “To repair our democracy – fix the gerrymandering and voter suppression – we must have a conversation that acknowledges structural racism.” Solutions offered included more grant dollars for racial equity grantmaking and continuing individual journeys through more personal development.

One small group brought forward the following: “If the goal is a participatory democracy where race is not a determinant in how you engage in electoral reforms/engagements, are we:

- 1) aiming at people of color as the primary audience to engage,
- 2) creating structures for multiracial coalitions, and/or
- 3) trying to get white people to understand what it means to be inclusive as a society?”

Each of these approaches requires its own planning and implementation process and resources.

On the topic of internal organizational change, participants discussed human resources and training, vendor policies, and staff and board education around history to develop a shared analysis of the way race impacts the work. Using their voice as a leader was also named as critical to guiding internal change.

In closing, the group expressed some additional ideas for moving the racial equity leadership imperative forward:

- a sense of urgency
- pace and balance – holding tension and harnessing it
- developing a healthy ecosystem that accommodates different entry points to the work
- exploring how to operationalize racial equity work
- determining “What is the craft?” as they examine their organizations’ current diversity, equity, and inclusion (DEI) process

## CORE THEMES

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Two new themes emerged during the Forum as central to engaging as a racial equity leader and advocate:

- Hidden stories and personal racial narratives are important.
- It takes focused learning to lead racial equity work. One president felt “consciously incompetent” on the issue, which led this person to participate in the Forum.

These themes join nine themes that emerged from the previous two Forum sessions:

- **Personal commitment:** How does commitment to racial equity connect to personal values?
- **Self versus the organization:** How do CEOs deal with the occasional struggle between their own personal development and commitment to racial equity and the specific strategy of the organization?
- **Push forward versus pull back:** What is the balance between satisfying the desire to move ahead on racial equity with the board's hesitation on pursuing the issue? Sometimes this can be the inverse, where the board is leading and the organization lags.
- **Calibration of how leaders see and address race:** How is CEOs' leadership expressed with a racial equity lens when they need to be visible on this issue for their staff?
- **Relationship building and culture:** How do CEOs' own cultural norms emerge from lived experiences, and how might that create conditions of in-ness, out-ness, one-up-ness, or one-down-ness in foundation relationships?
- **Racial equity versus DEI:** Should foundations use a specific racial equity frame or a broader (and at times more accepted) DEI frame?
- **Maps of the power of relationships and identity:** How do trusted relationships and the implications of "sameness" or diversity in the people CEOs rely on most impact their leadership?
- **New circles of trust:** How do CEOs get comfortable with the discomfort of broadening their trusted circles to bring in new voices, particularly the voices of those who are more proximate to the problem?
- **Commonalities around trust and power:** How do CEOs build trust by understanding the power differential between themselves as CEOs and the various audiences with whom they work?

## CONCLUSION

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The third Presidents' Forum continued to push the boundaries of leadership for racial equity for participants through meeting together in a peer-to-peer, facilitated dialogue. Additionally, the impact of the museum and the memorial was reported by all participants as making possible a new, more vulnerable level of conversation and adding a new urgency to the work.

Evaluations of the third session highlighted the importance of participating in a session that provided rich context for historical underpinnings of the current racial equity work in philanthropy. One hundred percent of survey respondents after the event said they have

more clarity about present-day and historical societal realities relevant to racial and ethnic equity for the southern region of the United States. Additionally, all respondents expressed a commitment to making racial equity a priority in their organizations, with 33 percent saying that they wholeheartedly support the work.

## **BACKGROUND ON THE PRESIDENTS' FORUM**

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In March 2018, the Presidents' Forum came into focus during a conversation between Keecha Harris, president of KHA, and Larry Kramer, president and CEO of the Hewlett Foundation. The overarching goal of the Presidents' Forum is to create intimate spaces where presidents and CEOs can grapple with racial equity leadership dilemmas and, through peer-to-peer conversations, seek solutions.

After a nine-month process of interviews with foundation presidents and CEOs and input from racial equity practitioners, the inaugural December 2018 forum was held to both officially launch the initiative and explore racial equity in philanthropy from the perspective of its leadership. The second forum took place in March 2019 in Washington, D.C. A third event occurred on June 3-4, 2019, and included further dialogue at Equal Justice Initiative's Legacy Museum in Montgomery, Alabama. The full reports of the [December 2018](#) and [March 2019](#) meetings proceedings and outcomes can be found on the Presidents' Forum website.

### **Anchoring Principles**

The six principles of the Presidents' Forum are:

- The Presidents' Forum intentionally centers leadership development as a foundational strategy for understanding and making progress toward racial equity.
- There is a deep commitment among many philanthropic executives to better understand how racial equity connects to their work, to engage with and support each other, and to improve their capacity as leaders in addressing questions of racial equity.
- Leadership development takes time and requires focus. In the Presidents' Forum, this will include opportunities for participants to contemplate how they develop trust, whom they trust, how they leverage power, and where they may exhibit biases.
- Virtually every issue philanthropy addresses – but especially issues like economic disparity, gender equality, and intergenerational equity – intersects with and is to some extent confounded by race. This fact matters because it inescapably influences how the sector invests resources into housing, education, the environment, health, civic engagement, the arts, and other areas.

- Philanthropy can deepen its impact if it acknowledges and is responsive to the racialized realities of the United States, including how the American context drives the sector’s work abroad.
- Creating space for philanthropy executives to explore their own development, expose their vulnerabilities, and share progress on understanding racial equity can afford opportunities to foster greater impact in all our work and priorities

## **Forum Conveners**

**The Institute for Strategic and Equitable Development** (ISED) serves as the nonprofit partner to KHA and Ali Webb Strategies (AWS), the conveners of the Presidents’ Forum. Each partner brought deep and varied experience into different aspects of the design and execution of the Forum meeting.

ISED supports efforts grounded in equity by focusing on grantmaking, investments, and economic development that impact communities of color through strategic planning, evaluation, project management, and technical assistance services. Also added to the mix of talent, the founder and principal of AWS, Ali Webb, brings to the work her 40-year career in local and national government, nonprofits, and foundations.

KHA, a national consulting firm and 8(a)-certified and woman-owned business based in Birmingham, Alabama, leads organizational development, project management, and evaluation projects for publicly and privately funded efforts across a broad range of topics. Through its professional development offerings, KHA has engaged foundations representing over \$98 billion (11% of the \$890 billion) in U.S.-based philanthropy assets. Clients include the Annie E. Casey, Robert Wood Johnson, W.K. Kellogg, William and Flora Hewlett, David and Lucile Packard, Schmidt Family, and Energy foundations as well as the United States Agency for International Development (USAID).

## **Facilitators**

To create and curate this exceptional and intentional space, a pair of Rockwood-affiliated facilitators was brought into the process. Yavilah McCoy, CEO of the consulting group DIMENSIONS Inc., is a nationally known leader in providing transformational resources for DEI strategies. She brings to her work a wealth of wisdom and experience in DEI consulting, nonprofit management, philanthropy, and engagement. She has partnered with numerous agencies to build strong, healthy organizations with measurable commitments to racial justice, equity, and anti-oppression in practice. Her facilitation partner, Mike Allison, has worked with nonprofit organizations for more than 25 years on strategic planning, organizational development, and governance. He started out as a community organizer and executive director. He has been active in exploring how to conduct strategy with racial equity as well as framing leadership development with racial equity at the center.