



THE CENTER
FOR EFFECTIVE
PHILANTHROPY

The background of the cover features five thick, parallel lines in shades of orange, dark blue, light blue, yellow, and grey, all trending upwards from left to right. The lines are slightly wavy and have a 3D effect.

FOUNDATIONS RESPOND TO CRISIS: Toward Equity?

*The Second in a Series
of Three Reports*

FOUNDATIONS RESPOND TO CRISIS: Toward Equity?

The Second in a Series of Three Reports

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ABOUT THE CENTER FOR EFFECTIVE PHILANTHROPY

The mission of the Center for Effective Philanthropy (CEP) is to provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness—and, as a result, their intended impact.

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Introduction

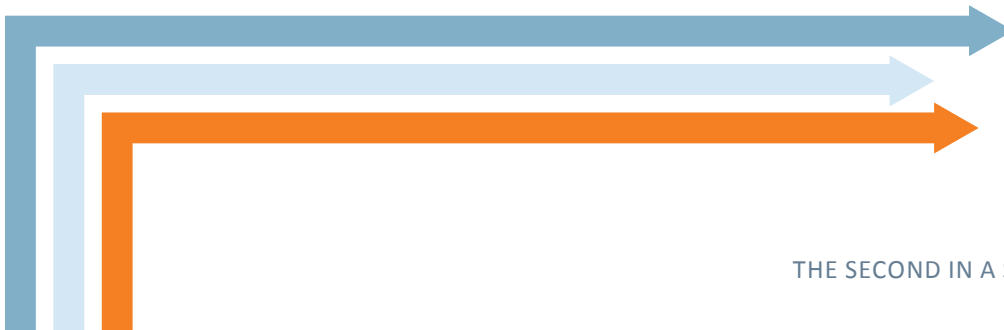
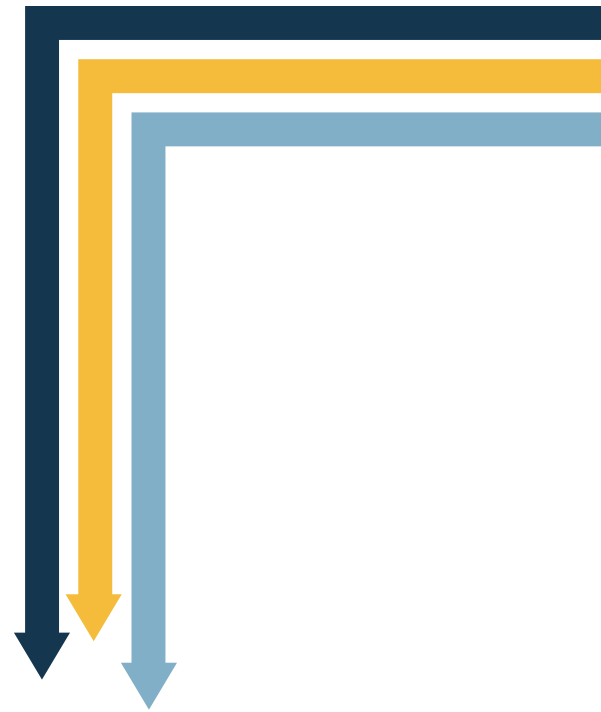
In this report—the second in a three-part series—we explore how foundations are supporting communities hit hardest by the COVID-19 pandemic—Black, Latino, Native American, immigrant, lower-income, and people with disabilities—and how exactly foundation leaders say they are reckoning with racism.

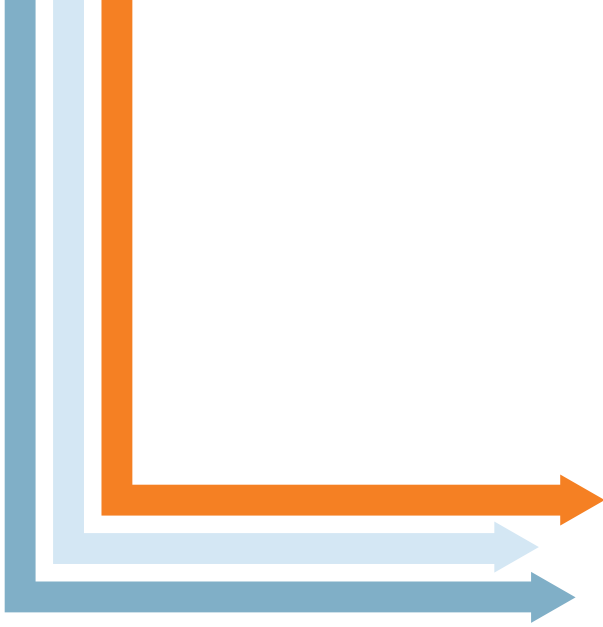
In early spring 2020, as the coronavirus pandemic worsened in the United States, the impact of COVID-19 and the subsequent economic fallout disproportionately affected certain groups and communities. Black, Latino, and Native American communities have experienced some of the highest infection and death rates from COVID-19 owing to multiple causes, including disproportionate representation in frontline, “essential” jobs and high rates of pre-existing conditions related to centuries of discrimination.¹ According to the Centers for Disease Control (CDC), 90 percent of people hospitalized from the virus had pre-existing conditions, many of which are classified as disabilities according to the Americans with Disabilities Act.²

The economic impacts have been vastly different, too: Latinas, for example, have left the workforce in greater numbers than women of any other racial/ethnic group.³ Asian Americans have also experienced dramatically high rates of job loss.⁴ There have been deep and disproportionate economic repercussions in tribal communities as well, a “direct result of systemic and historic failures by the U.S. government to uphold trust and treaty obligations,” explains the Center for

American Progress.⁵ The Economic Policy Institute explains, “Persistent racial disparities in health status, access to health care, wealth, employment, wages, housing, income, and poverty all contribute to greater susceptibility to the virus—both economically and physically.”⁶ Beyond racial and ethnic disparities, those with disabilities have disproportionately faced job losses and health care protocols that deem their lives less worthy of saving than those without disabilities.⁷

After the murder of George Floyd by police officers in Minneapolis in late May and the nationwide protests that followed, many foundations were also moved to reckon, in a deeper way than perhaps they had before, with anti-Black racism and how it affects their work. Throughout the pandemic, foundations have been increasingly urged to focus on equity, specifically racial equity.⁸ While calls for foundations to focus on equity are hardly new, demands for action have intensified.⁹





A statement from ABFE, signed by more than 60 Black philanthropic CEOs, says, “Our long-term goal is to free Black people from disparate treatment that result[s] in the racial disparities we see in COVID-19, police brutality and on almost every indicator of well-being. To get there, we must dismantle the structures... that disadvantage and marginalize Black people.” The statement highlights the critical role of philanthropy and that “all of us in philanthropy must be in it for the long haul.”¹⁰

Given the push for substantial shifts, we explored the changes that foundations are making to promote equity. The findings presented in this report are based on survey and in-depth interview data collected and analyzed by CEP. In July and August 2020, we surveyed more than 800 foundations.

- ▶ We received responses from 236 foundations —170 of which had signed Philanthropy’s Commitment During COVID-19 Pledge and 66 of which had not.
- ▶ Additionally, 41 foundations that signed the pledge participated in hour-long, in-depth interviews with CEP. (See Methodology for more information.)

RESEARCH QUESTIONS

This research effort sought to explore the following questions:

1. How are foundations responding to the crises of 2020? What high-level changes are they making?
2. How are foundation leaders responding to inequities exacerbated by the pandemic? How are they reckoning with racism?
3. In what specific ways are foundations supporting their grantees differently?
4. Will foundation leaders make these changes permanent or will they return to old practices over time? And what does this moment mean for the future of foundation philanthropy?

ABOUT THIS SERIES

This report is the second in a three-part series that explores how foundations are responding to the crises of 2020. The [first report](#) in this series considers how these crises are shaping the thinking and actions of U.S. foundations. The third report will explore the extent to which foundations

are being more flexible and responsive, including loosening grant restrictions, providing more unrestricted funding, and reducing what they ask of grantees. We will collect data about whether these practices are continuing when we undertake a second phase of this research next year.

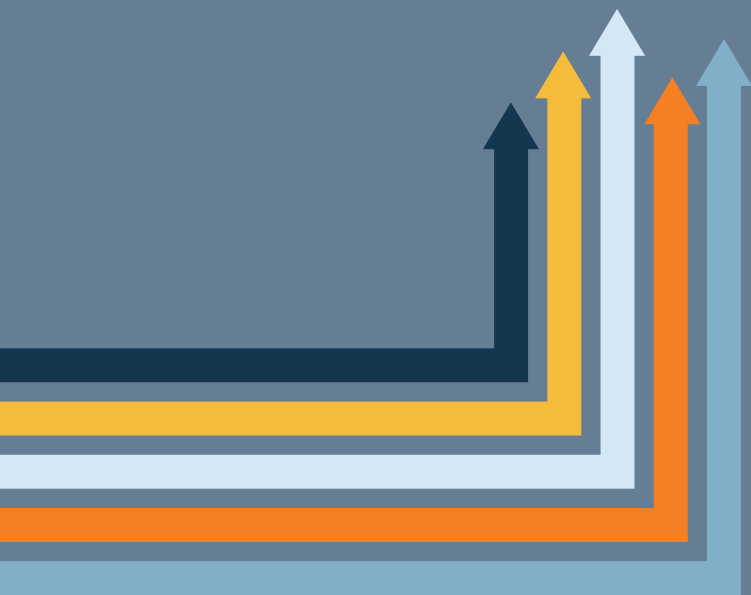
ABOUT THE PLEDGE

We based many of our questions for this research study on elements of the pledge “[A Call to Action: Philanthropy’s Commitment During COVID-19](#)” (subsequently referred to by some, including in this report, as “the pledge”), launched on the Council on Foundations’ website. This pledge—spurred by leaders at the Ford Foundation and informed by those involved in the Trust-Based Philanthropy Project—

charged funders to act with “fierce urgency to support our nonprofit partners, as well as the people and communities hit hardest by the impacts of COVID-19.” Nearly 800 signatories pledged to ease or eliminate restrictions on grants, reduce what is asked of grantees, support and uplift the voices of grantee partners, invest in the communities most affected, and more.

What We Found

Almost all foundations reported placing new, or more, focus on supporting Black, Latino, and lower-income communities. Most foundation leaders said they are reckoning with racism and paying greater attention to racial equity in their work. However, there are significant opportunities for further progress, and it remains to be seen how deep or sustained this new focus will be.



Responding to Communities Most Affected by the Pandemic

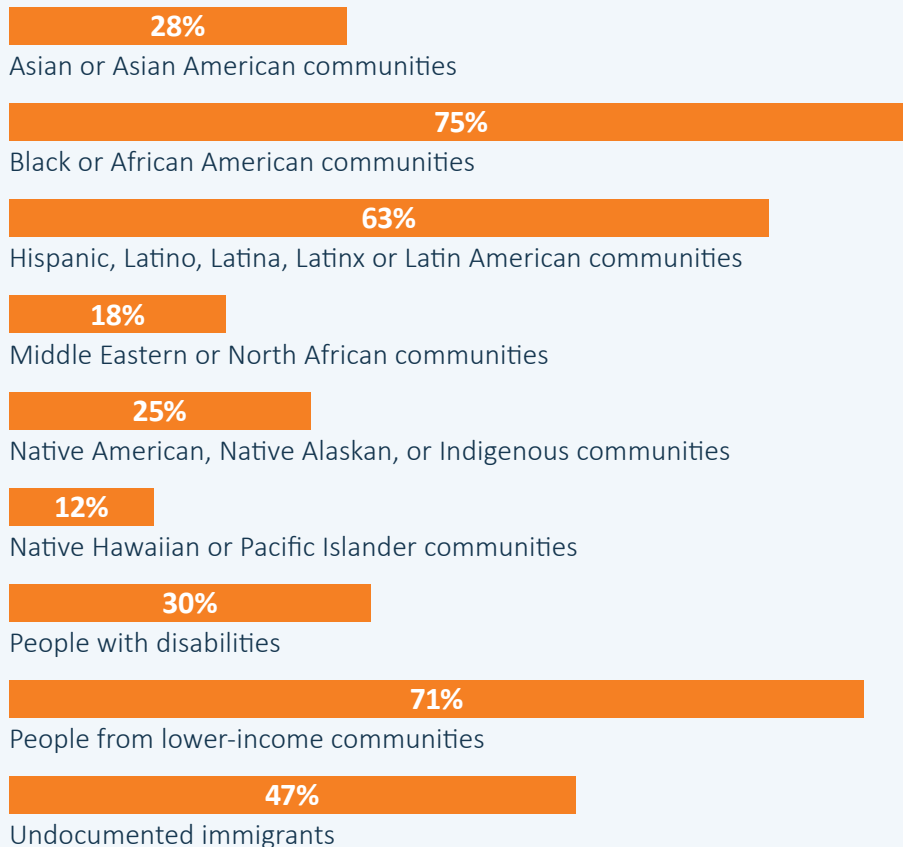
In response to the crises of 2020, foundation leaders reported having shifted their practices substantially. Most said they are addressing the inequities exposed by the pandemic, and almost

all said they have been reckoning with racism. In interviews, most foundation leaders explained that the urgent need for action resulted in swift changes with minimal process or bureaucracy. Hardly any leaders described staff or board opposition to changes they made.

FIGURE 1.

New Funding for Affected Communities

Percentage of foundations making new efforts to support organizations serving communities most affected by the pandemic (*Number of respondents = 218*)



SURVEY ITEM: NEW EFFORTS TO FUND NONPROFITS SERVING COMMUNITIES MOST AFFECTED

Below is the exact wording used in the survey for the data appearing in Figure 1.

People of color, people with disabilities, people from lower-income communities, and undocumented immigrants have been particularly adversely affected by the public health and economic consequences of COVID-19. Since the pandemic began, has the foundation made any new efforts to support organizations serving the following communities? (*Select all that apply*)

- ▶ Asian or Asian American communities
- ▶ Black or African American communities
- ▶ Hispanic, Latino, Latina, Latinx, or Latin American communities
- ▶ Middle Eastern or North African communities
- ▶ Native American, Native Alaskan, or Indigenous communities
- ▶ Native Hawaiian or Pacific Islander communities
- ▶ People with disabilities
- ▶ People from lower-income communities
- ▶ Undocumented immigrants
- ▶ None of the above (*mutually exclusive*)

NEW EFFORTS SUPPORTING NONPROFITS SERVING COMMUNITIES MOST AFFECTED BY THE PANDEMIC

Almost 90 percent of foundations surveyed are making new efforts to support organizations serving communities particularly adversely affected by the public health and economic consequences of COVID-19 (Figure 1). More than three-quarters of foundations surveyed are making new efforts to support organizations serving communities of color.

Most frequently, foundations have made new efforts to support organizations serving Black communities, lower-income communities, and Latino communities. One leader said, “With COVID, we’ve identified ZIP codes that tend to be Black or brown, that tend to be the underserved, that have been really impacted the most and put a higher emphasis on those.” Another leader

explained how foundation staff identified and supported local organizations led by and serving those most affected:

We had been hearing from 2-1-1 and from other nonprofit colleagues that the Latinx community was much more invisible than some others, especially during COVID. So, through our disaster-recovery fund, we pulled together three very small organizations that were critically embedded in this community—the most trusted organizations with the Latinx population—and said, ‘What do you need? What do you say ‘no’ to? How could you come together?’ From that conversation, those three organizations formed a partnership and have been able to do intakes for Latinx populations of any and all status to get them help, to keep them in their homes, healthy and safe, and to best support families.



“
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—FOUNDATION LEADER

Slightly less than half of foundations have made new efforts to support organizations serving undocumented immigrants. “Stimulus checks did not come to our immigrant population, who are working and paying taxes. So, knowing that, we had to make sure they had dollars in hand,” said one leader.

Fewer foundations have made new efforts to support other communities hard hit by the pandemic, such as Native communities, Asian or Asian American communities, and people with disabilities. In fact, in interviews, no foundations mentioned the topic of disability in relation to any question we asked.

LISTENING TO GRANTEES AND COMMUNITIES, ESPECIALLY THOSE MOST AFFECTED

Most survey respondents said that their foundation’s pandemic response has been shaped, in part, by input from grantees and those they serve. They said that as a result of feedback from the people and communities grantees serve, the most common change has been to what they fund. They are more focused on funding organizations serving communities of color and other communities most affected by the pandemic. Sometimes, these are organizations that they haven’t previously funded and organizations that focus on issues of equity. As one respondent put it, “We funded the most pressing inequities as a result of listening to grantees and community.”

“
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”

SUPPORTING WOMEN MOST AFFECTED BY THE PANDEMIC

COVID-19 has had disastrous consequences for working women—particularly women of color—and their families, as well as a regressive effect on gender equality.¹¹

In light of this development, we asked survey respondents whether their foundation has made any new efforts to support organizations serving women from communities most affected.

Support of organizations serving women in these communities follows a similar

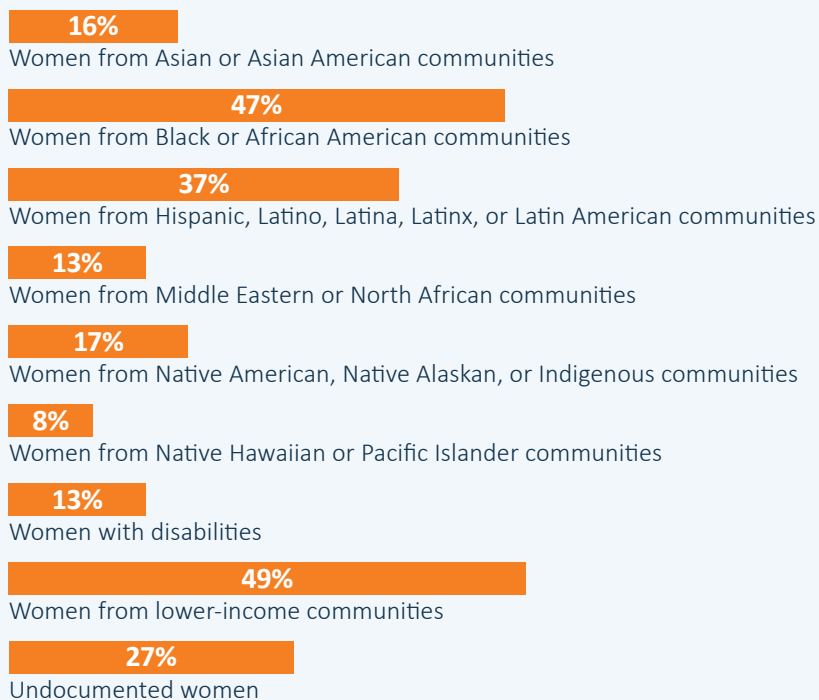
pattern to support of organizations serving these communities at large. Foundations have more frequently made new efforts to support organizations serving women from lower-income, Black, or Latina communities.

Few foundations reported making new efforts to support organizations that serve women from Asian American and Native communities, or women with disabilities (Figure 2).

FIGURE 2.

Supporting Women

Percentage of foundations making new efforts to support organizations serving women from communities most affected by the pandemic (*Number of respondents = 187*)



SUPPORTING ORGANIZATIONS CREATED AND LED BY INDIVIDUALS FROM THE COMMUNITIES MOST AFFECTED

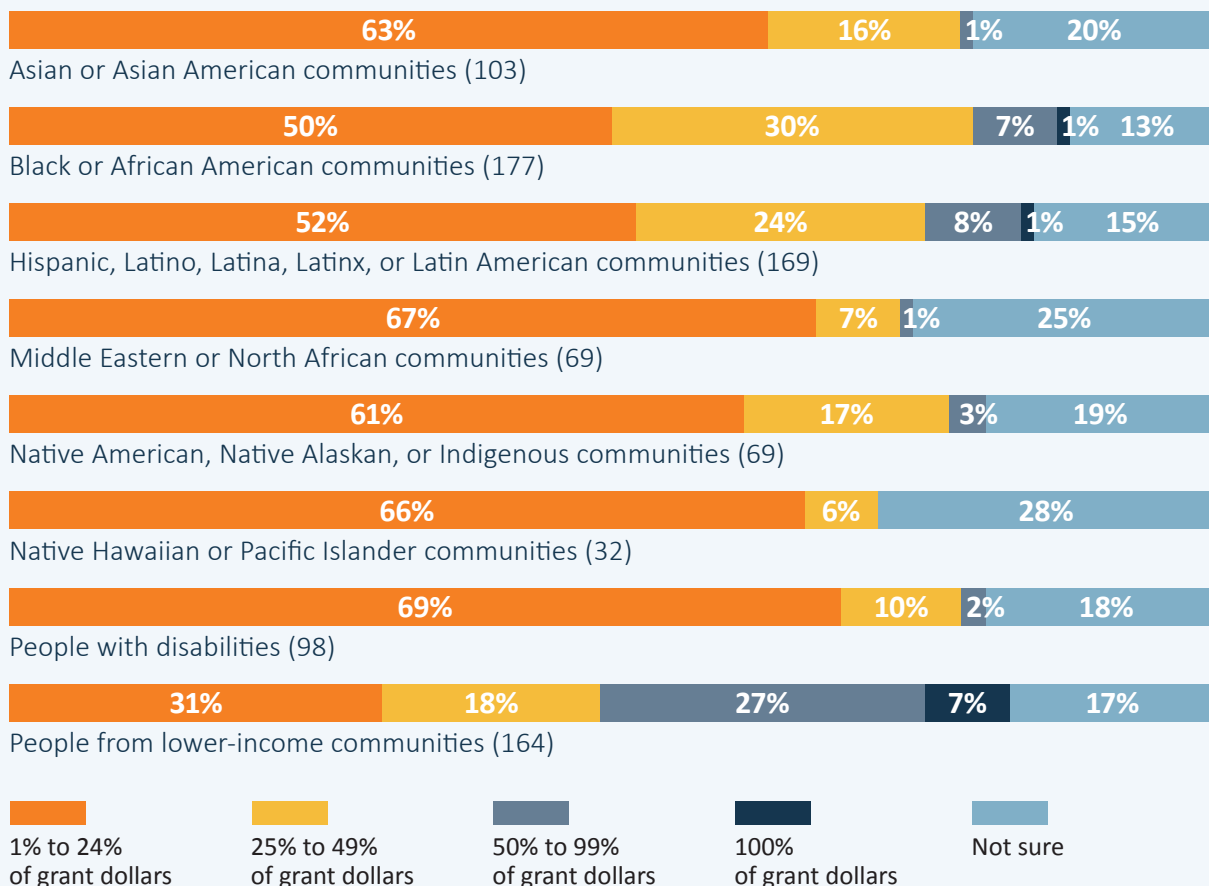
One of the eight elements of the [pledge](#) was the following: “We will also support organizations created and led by the communities most affected that we may not fund currently.” While 67 percent of survey respondents reported that, before the

pandemic, their foundation was supporting organizations created and led by CEOs from communities now hardest hit by the pandemic—communities of color, people with disabilities, people from lower-income communities—most were dedicating only a small percentage of their grant dollars (zero to 25 percent) to these organizations (Figure 3).

FIGURE 3.

Pre-Pandemic Funding

Percentage of grant dollars going to organizations led by CEOs/executive directors from the following communities (*Number of respondents noted in parentheses*)



Percentages in this figure may not add to 100 due to rounding.

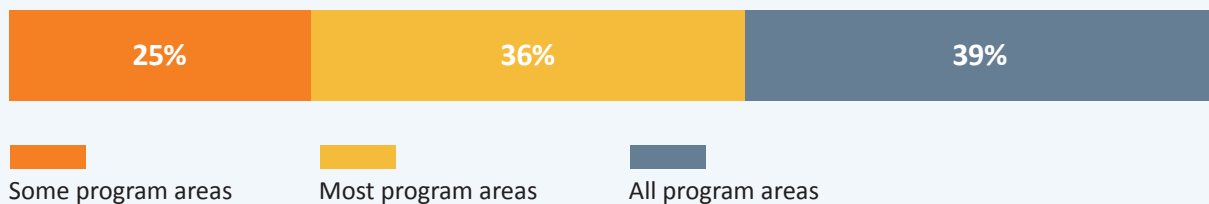
Slightly more than 20 percent of responding foundations said they only began supporting organizations created and led by CEOs from these communities *after* the pandemic began. Still, 12 percent said they do not support organizations created and led by people from communities most affected.

Only 39 percent of survey respondents who do support these organizations reported that these new efforts are taking place across all of the program areas at their foundation (Figure 4).

FIGURE 4.

Degrees of Change

Extent to which supporting organizations created and led by communities most affected by the pandemic has taken place across program areas (*Number of respondents = 207*)

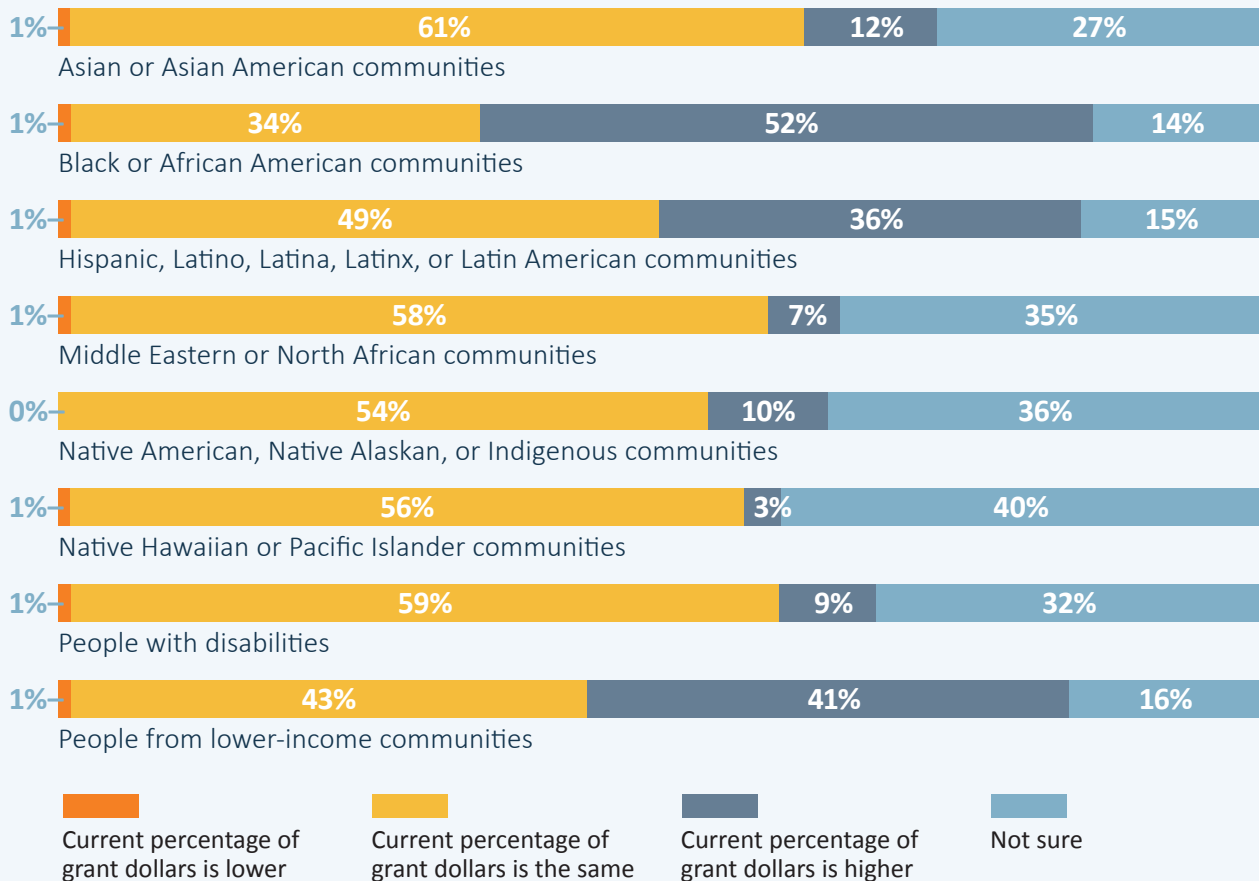


Percentages in this figure may not add to 100 due to rounding.

FIGURE 5.

Funding during the Pandemic

Changes in percentage of grant dollars foundations provide to organizations led by CEOs from the following communities, compared to pre-pandemic practices (*Number of respondents per item ranges from 179 to 201*)



Percentages in this figure may not add to 100 due to rounding.

Compared to their pre-pandemic practices, 59 percent of foundations surveyed say they are now giving a higher percentage of grant dollars to organizations created and led by CEOs from communities most affected by the pandemic (Figure 5). Foundations are more frequently increasing their giving to organizations created and led by individuals from Black, Latino, and lower-income communities. Said one interviewee,

“A year ago, we said, ‘It would be good to fund organizations led by people of color.’ We had no idea how we were going to fund, in what area, or what types of organizations. But now, we’re coming to understand what types of organizations will best address the root causes, and a lot of those are going to be organizations that are led by people of color.”

SURVEY ITEMS AND TERMINOLOGY FOR SUPPORTING ORGANIZATIONS CREATED AND LED BY COMMUNITIES MOST AFFECTED

There were many approaches we could have taken to ask about this pledge element, which states, “We will also support organizations created and led by the communities most affected that we may not fund currently.” Our survey could have asked about the self-identification of leaders with the highest levels of responsibility at the organization, diversity of staff or senior leadership, and more. We ultimately decided to ask specifically about the CEO/ executive director of these organizations. No one approach is perfect, and, in the context of supporting communities most affected by the pandemic, we recognize the importance of intersectionality of race, socio-economic status, disability, and other identities. A person of color–led organization isn’t necessarily indicative of representation from the most affected communities. To ensure that we collected data about leaders who shared the identity of the communities specified, we worded survey items to say “led by CEOs/executive directors from the following communities” and then listed each community for foundations to respond to individually.

The survey items we used to capture the extent to which foundations were implementing this element included the following:

- ▶ Before the pandemic began, did any of the foundation’s grant dollars go to organizations led by CEOs/executive directors from the following communities?
- ▶ Before the pandemic began, approximately what percentage of the foundation’s grant dollars went to organizations led by CEOs/executive directors from the following communities?
- ▶ Compared to its pre-pandemic practices, how has the percentage of grant dollars the foundation provides to organizations led by CEOs/executive directors from the following communities changed?
- ▶ Will supporting organizations led by people of color, people with disabilities,

and/or people from lower-income communities be permanently incorporated into the foundation’s grantmaking practices?

Foundation respondents were asked to answer each of the first three questions above for each of the following communities:

- ▶ Asian or Asian American communities
- ▶ Black or African American communities
- ▶ Hispanic, Latino, Latina, Latinx, or Latin American communities
- ▶ Middle Eastern or North African communities
- ▶ Native American, Native Alaskan, or Indigenous communities
- ▶ Native Hawaiian or Pacific Islander communities
- ▶ People with disabilities
- ▶ People from lower-income communities

SURVEY ITEMS AND TERMINOLOGY FOR SUPPORTING ORGANIZATIONS CREATED AND LED BY COMMUNITIES MOST AFFECTED (CONTINUED)

Respondents were given the option to say they are supporting none of these communities. They also were provided the option to indicate they are not sure whether their grant dollars are going to a particular community, both pre-pandemic and in response to the pandemic.

For the fourth question above, response options were as follows:

- ▶ Yes, in some of the foundation's program areas
- ▶ Yes, in most of the foundation's program areas
- ▶ Yes, in all of the foundation's program areas
- ▶ No
- ▶ Undecided

A sizeable percentage of foundation leaders were unsure whether they have changed the percentage of their foundations' grant dollars going to organizations created and led by individuals from some communities, including Native communities, people with disabilities, and Asian or Asian American communities. In the next phase of this research, we will seek to understand whether, and how, foundations are tracking allocation of grant dollars to nonprofits serving particular communities or led by individuals representing particular communities.

NEWFOUND URGENCY FOR SYSTEMS CHANGE AND POLICY INFLUENCE

More than 80 percent of interviewees raised the important role for philanthropy to play in advancing systems change and engaging in policy, especially advocacy and organizing. As one leader said, "Sometimes, philanthropy gets caught up in the moment. Let's not think about this as a moment. Let's look at the larger task

before us: changing our underlying systems. That's philanthropy's role." Another added, "It's time to change these policies, practices, and systems that allow these disparities to ensue. Advocacy has to be a key strategy."

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—FOUNDATION LEADER

More than one-third of these interviewees raised the importance of funding organizing, grassroots efforts, and movement-building to achieve policy change. As one said,

We also have to fund organizing. Organizing is drastically underfunded. And the resiliency, the fight-back, the ability to advocate for a change in policy—none of that would be possible if there weren't resources going to community organizing, to organizers, to building those leaders. Many of our grantees are trying to be heard on that point. It's not just 'make sure people get tested,' it's 'make sure we're also training-up organizers to fight the system.' And we're trying to also advocate for things like that in philanthropy.

The majority of these leaders said that the extent of the disparities exposed by the pandemic has pushed them to realize the need to engage, or engage more deeply, in policy, advocacy, and systems-change work. Said one leader, “The COVID moment, as well as the George Floyd murder, has really pushed us to get into systems change.” Another said, “Historically, the foundation has shied away from policy work. But the pandemic has laid bare that these issues are structural in nature. They're caused by systems that don't work. Until we address those systems, we're not going to be able to move the needle. And so, the board and the staff have come around, and we are looking a little bit more upstream.”

Leaders spoke about the need for a range of policy changes, including ensuring access to quality health care, providing protections and rental assistance for low-wage workers and families,

and addressing structural racism. One leader said, “We added health equity to our advocacy agenda. We have been advocating, alongside our grantees, to ensure that measures are in place to protect our vulnerable populations.” Another leader added, “The movement for Black lives is the policy agenda of the moment. We've seen funders give tens of millions of dollars to support the Affordable Care Act, marriage equality, and fair-share taxes. Those were deemed important enough to raise the alarm bells on. Philanthropy needs to support organizations that advance the movement for Black lives policy agenda.”

While slightly more than half of survey respondents said their foundation supported grantees' advocacy pre-pandemic, about 17 percent reported their foundation began to support grantees' advocacy as a result of the pandemic. Among foundations that are currently supporting grantees' advocacy, 59 percent said that this practice has been implemented across most or all of their program areas, and most of them said their foundation will continue to support these efforts permanently. Nearly one-third reported not supporting grantees' advocacy at all, before or during the pandemic.

Incorporating Racial Equity into the Way Foundations Work

Foundations reported incorporating racial equity into their external programmatic work and their internal practices. As has already been





mentioned, most foundation leaders explained in interviews that the urgent need for action resulted in swift changes, with few experiencing staff or board opposition to changes made.

In interviews, leaders at over 80 percent of foundations said they are making changes that incorporate racial equity into their grantmaking or programmatic strategies. About two-thirds described dedicating time to learning and reflecting about racial equity at their foundation, and slightly less than half reported making changes to internal practices. One leader said, “People who didn’t see inequity are now seeing it. And whether that’s people on your staff or your board or your community leaders, it’s opened the opportunity to have a different dialogue. And so, the requirement is to have the dialogue. Raise the issue. Push the issue. Force the conversation.” About half of all interviewees said that they have accelerated their racial equity work this year. One leader said, “Our charge is not to let the noise quiet down. It’s upon us to keep the noise level up, so that it stays elevated, so that we can really move forward and make significant change.”

INCORPORATING A FOCUS ON RACE IN GRANTMAKING AND STRATEGY

Most interviewees described a shift in focus to recognize the role that race plays in their work, or for some, to center race in their work. As one CEO explained, “No matter what the issue that a foundation is trying to move the needle on, racism is likely impacting their ability to get the

No matter what the issue that a foundation is trying to move the needle on, racism is likely impacting their ability to get the results that they want. And so, if they have not understood, acknowledged, or sought to address this, then they’re missing an integral part of the problem that they’re trying to solve through their philanthropy.

–FOUNDATION LEADER

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The changes that interviewees described making range widely, from ensuring that anti-racism is core to their mission, values, strategy, and processes; to providing funding to nonprofits led by people from, or serving, communities of color; to supporting grantees to better incorporate and advance racial equity within their own work; to building metrics and indicators for ensuring racial equity outcomes.

Some foundations are formally revisiting their program strategies and decision-making frameworks. Said one leader, “Until the racial protests started happening, there wasn’t a formal equity focus, and now there is.”

More than half of survey respondents reported their foundation has changed aspects of its grant application process to reach more nonprofits led by people from communities most affected by the pandemic. One leader, for example, described



White people have to look internally at their behaviors, at their belief systems, while also changing their behavior externally. I think philanthropy has to do the same thing. Philanthropy has to look inside itself internally, or else it's never actually going to change over the long term.

—FOUNDATION LEADER

making decisions about grants by using an “equity filter” to prioritize organizations led by people of color, grassroots organizations, and organizations with smaller budgets. A few proactively broadened the accessibility of their request for proposals by, for example, placing them in the newspaper. A few picked up the phone to reach out to organizations they had not yet funded but who were trusted by and already supporting those most affected.

One leader said, “We need to be more intentional in ensuring that nonprofit leaders of color are accessing our grantmaking application. We need to establish and build relationships with them so that they know when our grant cycles are, so they can compete fairly, so they’re not faced with restrictions and obstacles.” Another said, “When you think about how we set up processes, it’s not surprising that so few of these organizations receive significant institutional philanthropy support. I think that more folks are examining their practices, looking at the data and who they’re giving grants to, and hopefully being a lot more intentional about making sure that they’re investing in organizations that are led by folks in communities of color and driven by those communities.”

CHANGES WITHIN FOUNDATIONS

Some interviewees believe that to meaningfully advance racial equity externally, the foundation must first look at how it promotes racial equity internally. As one foundation leader said, “White people have to look internally at their behaviors, at their belief systems, while also changing their behavior externally. I think philanthropy has to do the same thing. Philanthropy has to look inside itself internally, or else it’s never actually going to change over the long term.”

Most foundations interviewed discussed their foundation turning inward to reflect on racial equity, which included personal reflection and learning, as well as making changes in organizational practices and policies. One leader said:

As this national reckoning about race and privilege has unfolded, no institution is exempt from that reckoning. No person, especially no white person, is exempt from that reckoning. This means that we, as a staff, have some tough introspection to do as an institution, and that includes our trustees. And that requires a kind of personal conversation and a vulnerability that is beyond our past norms for how staff and board relate to each other.

At the time of the interviews, leaders more frequently described reflecting and learning, rather than making changes to their internal policies and practices—which slightly less than half reported doing. For foundations that did make such changes, their descriptions of these changes were broad, with limited detail. Changes included efforts to build, retain, and promote a more racially diverse staff and create a more equitable culture. A few foundations also described efforts to hire diverse investors and vendors.

TABLE 1. Racial Composition of Respondent’s Foundation Board

(Number of responding foundations = 218)

	PERCENTAGE OF FOUNDATIONS	NUMBER OF FOUNDATIONS
Less than 25% people of color	57%	125
25% to 49% people of color	29%	63
50% to 74% people of color	11%	23
75% to 100% people of color	3%	7

*Note: Response options in the survey were exactly as listed in this table: Less than 25% people of color; 25% to 49%; 50% to 74%; 75% to 100%.

BOARD DIVERSITY AND UNDERSTANDING

More than half of the foundations represented in our survey data reported that less than 25 percent of their board members are people of color (Table 1). Only 14 percent reported that the majority of their board members are people of color. These responses are similar to findings from a 2018 BoardSource study, which showed that foundation boards are overwhelmingly white.¹²

Yet, interviewed leaders at only 12 percent of foundations proactively raised the need for their board to be more racially diverse. At an additional 12 percent of foundations, interviewees said

their board needs to better understand how issues of race and racism affect the work of their foundation. Some described struggling with differences of opinion between staff and board about how to engage and proceed with regard to racial equity. One of these leaders reflected:

Every time we bring up DEI with our board, it goes nowhere. And when we bring it up, they say, ‘Well, we’re doing it. We don’t need this.’ And they desperately do. We are hoping that with everything going on, it will provide us a forum to have these important conversations. I think they feel like they get it. Most don’t have a clue. They know nothing about white privilege. They know nothing about white supremacy. They know nothing about the four hundred years. In our strategic planning, even though the staff says we are going to put everything through a DEI lens, if you actually asked our board what DEI stands for, most of them wouldn’t even be able to tell you.

Every time we bring up DEI with our board, it goes nowhere.

—FOUNDATION LEADER

Another CEO shared:

I am a person of color leading this foundation, and it's been a struggle. My board doesn't want to talk about racism. As a person of color, I cannot lead this for the board. The board has to own it. They need to speak up and get behind the mission and focus of the foundation. I need the support of the board to allow me to do my work. When you talk about racism, racial equity, and social justice, your leader can be 100 percent behind that, but that leader needs the support of the board. You will go further if you have the support of the board.



Research shows that more diverse foundation boards perform better, drawing upon their varied perspectives and experiences to make more informed strategic decisions and plans.¹³ Across most survey items, we see a trend of slight but meaningful differences in foundation practices based upon the racial diversity of boards.¹⁴ We see that foundations with more racially diverse boards are slightly more likely to engage in the following practices:

- ▶ Changing their grant application process to reach more organizations led by those from communities most affected by the pandemic
- ▶ Making new efforts to support organizations serving communities most affected by the pandemic, particularly communities of color and undocumented immigrants

- ▶ Supporting organizations led by communities of color and lower-income communities pre-pandemic
- ▶ Providing a greater percentage of grant dollars to Black-led organizations pre-pandemic
- ▶ Communicating proactively and regularly with grantees in all program areas (not time specific)
- ▶ Making changes to their practices based on feedback from grantees during the pandemic
- ▶ Lifting up the voices of grantees to inform the public discourse during the pandemic
- ▶ Lending their own voice to support grantee advocacy before and during the pandemic

We did not find differences across survey items, or a clear relationship with board diversity, related to whether the person leading the foundation identified as a person of color. The analysis of the data on boards, however, raises the possibility that changes in foundations' practices could remain absent, or limited, or fleeting if not accompanied by expanded board racial diversity.

ROOM FOR PROGRESS

Almost 90 percent of foundations interviewed said that they will be focusing more on racial equity. Many of them described, unprompted, that they need to be doing better in their racial equity efforts. Some specified particular areas for improvement, such as increasing staff diversity; doing more to integrate equity into their strategy and grantmaking approaches; reducing barriers to funding; conducting more and better outreach and relationship building in the community, particularly with organizations led by people of color; and increasing the diversity on their boards. One leader said, "Racial and social justice have been part of our strategic plan, but we haven't done enough. Everything we do will have a different lens going forward, both internally and externally: our investments, our personal policies, our grantmaking. We just have more work to do."

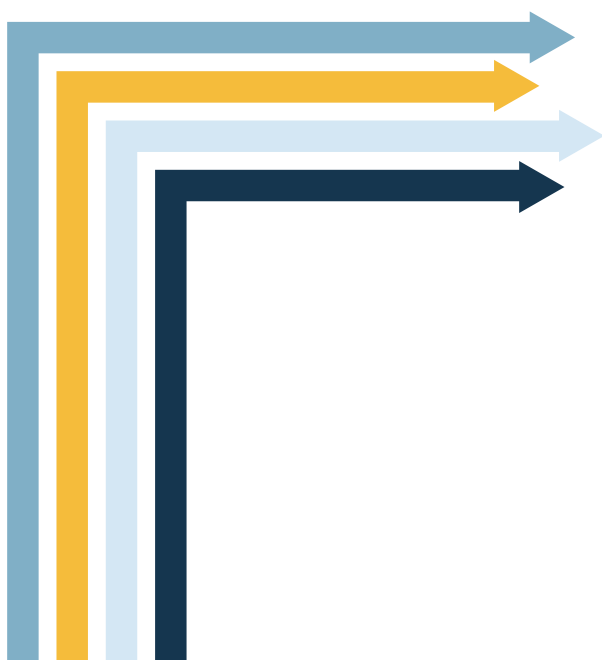
Recognizing they still have a long way to go, another leader said:

Historically, our community foundation hasn't represented marginalized communities. We haven't used our position of privilege and all the strengths of our organization to truly impact the broadest definition of the community. People have been left out. We haven't known one another. We haven't developed relationships with one another. We have been working to create a better sense of belonging and inclusion in our community, and our nation's focus on this has added more relevance and more urgency to this work. We would really like to be as true a community foundation as we can be, in the broadest sense of community. That's what's motivating us. And we acknowledge that we haven't done that as well as we could.

It's not only foundations new to this work that recognize there is more to be done. Some leaders who described their respective foundations as historically grounded in racial justice also said there is even more they could be doing. One leader said, "Our equity framework has been

helpful in supporting our work, what we see in the data and see in the lives of our community. It's helped us communicate how structural discrimination has shaped our community. But we, as an institution, have room to grow and be even more explicit about racism and how it is the largest driver of health inequities."

Some see the need for more fundamental shifts in the way foundations understand the context of racial equity, including reconsidering the role of power. As one leader said, "We have to reckon with the fact that the wealth in philanthropy was built on the backs of BIPOC communities and so at the end of the day we need to make sure communities are at the decision-making table." Another leader suggested that foundations do more to "relinquish power and allow more community voices to be actively engaged and involved in terms of where and how money is distributed within community." Another added, "It's important that we stop to ask, 'What's the importance of philanthropy? What role do we play in the current environment? How do we change the power structures? A pledge like this really causes philanthropy to pause and say, 'Is it time to shake up the way philanthropy's responding?'"



Racial and social justice have been part of our strategic plan, but we haven't done enough. Everything we do will have a different lens going forward, both internally and externally: our investments, our personal policies, our grantmaking. We just have more work to do.

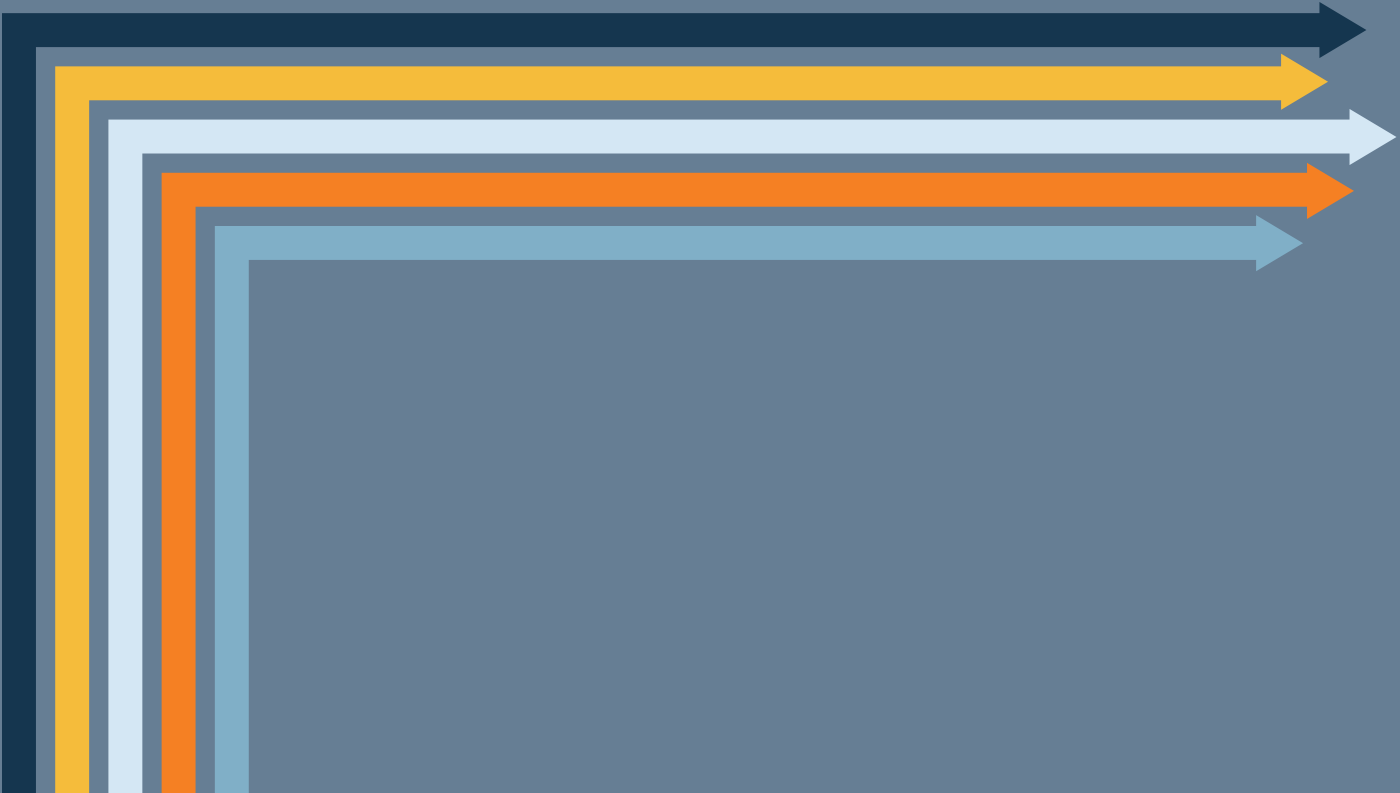
—FOUNDATION LEADER



Conclusion

Foundations reported making many changes to their work in 2020. Most said they have made new efforts to better support communities hardest hit by the pandemic. Most also said they are more aware of how race and racism affect the choices they make and the work they do, and they are making changes to address their long-standing practices and systems that perpetuate inequity.

Many of the elements that foundations said they are implementing are consistent with the racial *equity* lens described by the Philanthropic Initiative for Racial Equity (PRE) but not the more comprehensive racial *justice* lens PRE describes. That racial justice lens, among other things, “emphasizes transformative solutions that impact multiple systems” and “focuses on building civic, cultural, and political power by those most impacted.”¹⁵ Most foundations in this study



realize there is much more work to be done, but whether their changes will accomplish this work remains to be seen.

It also remains to be seen how committed foundation leaders are to making certain changes, such as making their boards more racially diverse. Foundation boards remain overwhelmingly white—and we see a relationship between a board’s racial diversity and a foundation’s likelihood to undertake a number of practices, including supporting organizations most affected by the crises of 2020. Yet, few foundation leaders we spoke with mentioned increasing the racial diversity of their board as a priority.

This study reveals potentially significant oversights when it comes to communities that have received less support in response to the pandemic, such as Native Americans, Asian Americans, and those with disabilities.¹⁶ A sizeable proportion of the population, no matter their race, ethnicity, or gender identity, have a disability, which often compounds discrimination and financial distress.¹⁷ Yet, not one interviewee in the study mentioned the topic of disability.

Foundation leaders interviewed did raise issues of racism and racial equity before we asked about it, however, and this is a notable difference from past research we have conducted. The momentum behind foundation leaders’ desire to support progress in racial equity seems strong. But there’s also reason for skepticism. One leader said, “I really hope we’re moving forward into a new reality, and one that is working to dismantle and will continue to dismantle racist systems and systems of white supremacy, from here on out.” Another said, “Philanthropy is immensely susceptible and vulnerable to trends. We’re



seeing a lot of performative behaviors around the response to racial justice. What I would say is, ‘Philanthropy, this is not a trend.’”

In 2021, we will be surveying and interviewing foundations about the changes they began making this year. Only time will tell whether these changes will be fleeting or sustained and how foundations will continue to advance racial equity through their work. As one foundation leader summed it up:

There are a lot of ways that we can virtue signal, putting out statements and saying that we stand in solidarity or using terms that everybody uses, like equity, collaboration, and community engagement. I think part of what we are seeing is the disconnect between what people say and what they do. I’m tired of the rhetoric. Talk is cheap. When they look at the future and they think about, ‘Well, how can we do this more consistently in the future?’ It’s like, just do it. What scares you? What is the thing that you think is holding you back? Just fricking do it.

Methodology

The findings presented in this three-part report series are based on data collected, analyzed, and interpreted by CEP. In total, 236 foundation leaders and 191 nonprofit leaders completed surveys. Additionally, 41 foundations participated in in-depth interviews. Information detailing the process for collecting and analyzing the data is below.

Survey Methodology

Survey Populations

FOUNDATIONS THAT SIGNED THE PLEDGE (SIGNED SAMPLE)

The Council on Foundations provided CEP staff with a list of all organizations that had signed the pledge as of July 7, 2020. Foundation CEOs whose organizations had signed the pledge by this date were invited to participate in a survey examining their implementation of its elements. CEOs were eligible for inclusion in this research study if the foundation they worked at was

categorized as an independent foundation, health conversion foundation, public charity, regrantor, corporate foundation, or community foundation by Candid's Foundation Directory Online or CEP's internal contact management software; and

had annual asset and giving information available through Candid's Foundation Directory Online.

FOUNDATIONS THAT DID NOT SIGN THE PLEDGE (UNSIGNED SAMPLE)

CEOs of foundations that did not sign the pledge but that would typically be invited to participate in CEP's research (i.e., community and independent foundations that give at least \$5 million annually in grants), were invited to participate in a survey examining their responses to the COVID-19 pandemic. These CEOs were eligible for inclusion in this research study if the foundation they worked at

was based in the United States;

was categorized as an independent, health conversion, or community foundation by Candid's Foundation Directory Online or CEP's internal contact management software; and

provided \$5 million or more in annual giving, according to information provided to CEP from Candid in June 2019.

Furthermore, to be eligible for inclusion in either the signed or unsigned sample, CEOs leading eligible foundations must have had

a title of president, CEO, executive director, or equivalent, as identified through the foundation's website, 990 form, or internal CEP staff knowledge; and

an e-mail address that could be accessed through the foundation's website or internal CEP records.

NONPROFITS

Nonprofit perspectives on the support foundations are providing during the pandemic were collected from CEP's panel of nonprofit leaders, *The Grantee Voice: Feedback for Funders*. For more information on the current panel, please click this [link](#).

Survey Sample Characteristics

FOUNDATIONS

After meeting the criteria above, in July 2020, 446 CEOs of signed foundations and 437 CEOs of unsigned foundations were invited via email to complete their respective surveys. The survey instructions invited CEOs to pass the survey along to other senior leaders at their foundation if those people were better positioned to complete it.

While the surveys were fielded, 14 signed foundation CEOs and 13 unsigned foundation CEOs were removed from the sample due to invalid emails or responses showing them to be ineligible. Two foundation CEOs were removed from the unsigned sample and added to the signed sample because new information showed that they had signed the pledge since our sample was created. One foundation CEO was removed from the signed sample and added to the unsigned sample because new information showed that it had not signed the pledge.

Completed surveys, defined as having completed at least 80 percent of crucial questions displayed, were received from 158 signed foundation leaders and 62 unsigned foundation leaders. Partially completed surveys, defined as being at least 50 percent complete, were received from 12 signed foundation leaders and 4 unsigned foundation leaders (Table 2). Of the 236 total responses received from foundations, 166 came from CEOs/executive directors or equivalent, 32 came from vice presidents of programs or equivalent, 6 came from directors of strategy or equivalent, 19 came from other senior leaders, and 13 came from respondents who did not indicate their role.

NONPROFITS

In July 2020, the 590 nonprofit leaders who comprise the *2019-2021 Grantee Voice* panel were invited via email to complete their survey. While the survey was fielded, 9 nonprofit leaders were removed from the panel as they had left their respective organizations or provided information indicating that they were ineligible to be part of the panel. Completed surveys were received from 190 leaders, and a partially completed survey was received from one leader (Table 2).

TABLE 2. Sample Characteristics and Response Rates

SURVEY SAMPLE	SURVEY PERIOD	NUMBER OF ELIGIBLE RESPONDENTS	NUMBER OF COMPLETED/PARTIAL RESPONSES	SURVEY RESPONSE RATE
Signed foundations	July to August 2020	434	170	39%
Unsigned foundations	July to August 2020	425	66	16%
Nonprofits	July to August 2020	581	191	33%

Survey Administration

All three surveys were fielded online for a four-week period from July to August 2020. Foundation and nonprofit leaders were sent a brief email including a description of the purpose of the survey, a statement of confidentiality, and a link to the survey. Leaders were sent up to eight reminder e-mails.

Survey Respondent Demographics

FOUNDATIONS

Foundation respondents from both samples represented foundations that varied in type, assets, and giving (Table 3).

TABLE 3. Survey Respondent Sample—Foundation Characteristics

FOUNDATION CHARACTERISTIC	TOTAL SAMPLE	SIGNED SAMPLE	UNSIGNED SAMPLE
Type of foundation			
Independent	53%	49%	61%
Health conversion	6%	4%	11%
Community	34%	36%	29%
Public charity	5%	6%	0%
Regrantor	1%	1%	0%
Corporate	2%	3%	0%
Assets			
Range	~\$188K to ~\$11.4B	~\$188K to ~\$9.9B	~\$18M to ~\$11.4B
Median Value	~\$140M	~\$95M	~\$240M
Giving			
Range	~\$4K to ~\$430M	~\$4K to ~\$430M	~\$5M to ~\$365M
Median Value	~\$8M	~\$5.6M	~\$15.8M

NONPROFITS

Nonprofit respondents represented organizations that varied in expenses and staff size (Table 4).

TABLE 4. Survey Respondent Sample—Nonprofit Characteristics

NONPROFIT CHARACTERISTIC	RANGE	MEDIAN VALUE
Expenses	~\$100K to ~\$77M	~\$1.6M
Staff	1 FTE to 540 FTE	15 FTE

Response Bias

FOUNDATIONS

Responses to both foundation surveys were examined for response bias. Signed foundations with leaders who responded to this survey did not differ from non-respondent signed foundations by geographic region, annual giving, or asset levels. Leaders from signed foundations that have used CEP's assessments were slightly more likely to respond to the survey than those from signed foundations that have not used a CEP assessment.¹⁸ Leaders from signed independent foundations were slightly more likely to respond to the survey than those from signed community foundations.¹⁹

Unsigned foundations with leaders who responded to this survey did not differ from non-respondent unsigned foundations by geographic region, annual giving level, or foundation type. Leaders from unsigned foundations that have used CEP's assessments were slightly more likely to respond to the survey than those from unsigned foundations that have not used a CEP assessment.²⁰ Leaders from unsigned foundations at or above the asset median split were slightly more likely to respond to the survey than those from unsigned foundations below the asset median split.²¹

NONPROFITS

Nonprofits with leaders who responded to the survey did not differ from non-respondent nonprofits by annual expenses, staff size, or geographic region.

Survey Instruments

FOUNDATIONS

The two foundation surveys assessed foundation leaders' experiences responding to the COVID-19 pandemic and the ensuing health, economic, and social crises. The signed foundation survey, which contained 70 items, examined foundations' implementation of the elements of the pledge and the additional ways they are supporting their nonprofit partners during the pandemic. The unsigned foundation survey, which contained 66 items, similarly assessed the extent to which foundations that did not sign the pledge were implementing practices consistent with the pledge's elements, such as loosening grant restrictions, and the additional ways they are supporting their nonprofit partners during the pandemic. The surveys were designed to be comparable, with items and response options in the unsigned survey being amended to remove reference to the pledge.

NONPROFITS

The nonprofit survey consisted of 29 items and included questions about leaders' awareness of the pledge, their foundation funders' commitment to the pledge, and how actions taken by their foundation funders that had signed the pledge during the pandemic have affected their organizations.

Copies of all survey instruments and protocols can be found on our website.

Quantitative Analysis of Survey Data

The quantitative survey data from foundation and nonprofit leaders were examined using descriptive statistics and a combination of correlations, independent sample t-tests, paired samples t-tests, chi-squares, logistic regressions, and analyses of variance tests. An alpha level of 0.05 was used to determine statistical significance for all testing conducted for this research. Effect sizes were examined for all analyses. Unless otherwise noted, only analyses with medium or large effect sizes are reported.

Qualitative Analysis of Survey Data

Thematic and content analyses were conducted on the responses to the open-ended survey items in the foundation and nonprofit surveys.

A codebook was developed for each open-ended item by reading through all responses to identify common themes. Each coder used the codebook when categorizing responses to ensure consistency and reliability. One coder coded all responses to a survey question and a second coder coded 15 percent of those responses. An average interrater reliability level of at least 80 percent was achieved for each codebook.

Selected quotations from the open-ended survey responses were included in this report. These quotations were selected to be representative of themes in the data.

Interview Methodology

Interview Population

Of the foundations included in the signed foundation CEO sample, 80 were randomly selected and invited to be interviewed from June to August 2020. To ensure that our interview group was representative of the type, geographic region, and size of foundations that have signed the pledge, signed foundations were stratified by the following variables:

Type of foundation (independent, community, or corporate foundation)
Geographic region (Midwest, Northeast, South, or West)
Assets (over or under the median of signatories at the time, which was approximately \$127M)

Foundation CEOs were then randomly selected from each of the stratified groups to ensure that a representative sample was invited to participate in interviews.

Ultimately, 41 foundations participated in interviews. CEOs were invited to include staff members who helped to implement the pledge elements at the foundation in their interviews. Of the 41 interviews, 20 were with the foundation CEO, 16 were with the CEO and other staff members, and seven were with foundation staff interviewing in the CEO’s stead. Interviewees were not asked to share how they identify with regard to race or gender.

Sample Demographics

Interviewees represented foundations that varied in type, geographic location, and asset size (Table 5).

TABLE 5. Interviewee Sample—Foundation Characteristics

FOUNDATION CHARACTERISTIC	PERCENTAGE
<i>Type of foundation</i>	
Independent	51%
Health conversion	2%
Community	39%
Corporate	7%
<i>Geographic location</i>	
Northeast	27%
Midwest	22%
South	29%
West	22%
<i>Assets</i>	
Range	~\$1.67M to ~\$2.32B
Median value	~\$136M

Interview Protocol

An interview protocol was developed and three pilot interviews with leaders of foundations that signed the pledge were conducted to test the clarity, relevance, and utility of the interview protocol. The interview protocol was edited based on the feedback from the pilot interviewees and results of the pilot interviews. Pilot interviews were excluded from the analysis.

Every interview protocol began with an introductory script describing the purpose of the study and the confidentiality of the conversation. At the start of the conversation, interviewees were asked to provide permission for the interview to be recorded and transcribed.

The interview protocol consisted of 19 questions for the interviewee(s) about why their foundation signed the pledge, how their foundation has implemented the elements of the pledge, actions the foundation has taken beyond the pledge, how the foundation has responded to our country's reckoning with racism, and their thoughts, more broadly, on what these compounded crises mean for the philanthropic sector going forward.

Data Collection

From June to August 2020, 41 interviews were conducted by two CEP staff members. Interviewers discussed the interview process and worked together to establish consistency in style. Interviews lasted approximately one hour. All interviewees were promised confidentiality.

Data Analysis

Interview recordings were professionally transcribed and thematically coded by members of CEP's research team. Several transcripts were reviewed by three coders, and common themes were identified and used to create a codebook. The codebook was used to code all subsequent transcripts and ensure consistency across all coders. An 80 percent level of pairwise interrater reliability agreement was achieved for all codes.

Descriptive statistics were conducted to examine the prevalence of common themes in each interview. Quotes that were representative of these themes are included throughout the report.

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18. A chi-square analysis was conducted between whether leaders of signed foundations responded to our survey and whether those foundations have used a CEP tool. A statistical difference of a small effect size was found (0.109).

19. A chi-square analysis was conducted between whether leaders of signed foundations responded to our survey and foundation type. A statistical difference of a small effect size was found (0.168).

20. A chi-square analysis was conducted between whether leaders of unsigned foundations responded to our survey and whether those foundations have used a CEP tool. A statistical difference of a small effect size was found (0.192).

21. A chi-square analysis was conducted between whether leaders of unsigned foundations responded to our survey and whether those foundations were above or below the asset level median split. A statistical difference of a small effect size was found (0.116).



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