

RACIAL JUSTICE STRATEGY

A 10-year initiative to advance racial justice in our foundation and grantmaking

June 2022

The William and Flora Hewlett Foundation is a nonpartisan, private charitable foundation that advances ideas and supports institutions to promote a better world. For more than 50 years, we have supported efforts to advance education for all, preserve the environment, support vibrant performing arts, strengthen Bay Area communities, make the philanthropy sector more effective, and foster gender equity and responsive governance around the world.

Hewlett's racial justice strategy is guided by the foundation's Culture, Race, and Equity team, which identifies and promotes practices, programming, and grantmaking to advance racial justice. With the team's support, the entire foundation will seek to combat injustice as part of, not in place of, longstanding goals like addressing climate change, improving the quality of K-12 education, building public trust in our democracy, and ensuring women's reproductive rights.

The Hewlett Foundation has made this strategy public to partners, funders, and civil society as part of its commitment to openness, learning, and transparency.

Acknowledgements

The Culture, Race, and Equity team would like to thank and acknowledge the dozens of individuals who were willing to honestly and openly offer their ideas, feedback, and reflections on how the Hewlett Foundation can better support racial justice as an essential part of the foundation's work. In particular, we would like to extend our gratitude to racial justice leaders, whether academics or people on the frontlines, who are daily working to create a better future for Black, Indigenous, and other people of color. It is through your commitment and labor that we will achieve a more just, equitable, and inclusive world. We are excited to work hard to live up to your hopes and expectations for the Hewlett Foundation, and we welcome your continued input and feedback along the way.



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I. Introduction

In the summer of 2020, the Hewlett Foundation committed for the first time to work on racial justice directly. The stage for this had been set by the COVID-19 pandemic, which resulted in extremely high hospitalization and death rates, learning loss, and elevated unemployment rates. While true everywhere, the impact in each instance was more severe in communities of color — a product of the systemic nature of racism, which affects everything from access to quality health care and education, to wealth acquisition, homeownership, employment opportunities, and more. Key foundation areas of focus — such as climate change, access to reproductive health services, educational opportunities, and participation in democratic politics — are not immune from the effects.

As if this were not enough, there were a recording-breaking \$22 billion weather and climate-related disasters in the United States in 2020. In the midst of COVID, these incidents battered climate-vulnerable communities, which are largely comprised of people of color, leaving residents in dire need of essential resources like food, water, and gas. Access to health care, employment, voting, and learning opportunities were also affected. The confluence of these events visibly revealed systemic and structural inequities, exposing clearly how the costs and consequences of events are not equally shouldered. As one colleague noted, we are all in the same storm, but not in the same ship, boat, or life raft.

Although the excruciating nine-minute video of George Floyd being callously and casually murdered was the public impetus for Hewlett (and countless other philanthropic and nonprofit organizations across the country) to take action, our commitment was motivated by other sources as well. While we did not expressly list them at the time, they are worth making explicit here, given their relationship and connection to our issues and work. In particular, we were moved by mass protests that took place across the country and around the world against systemic racism, economic inequality, and police violence. The level of activism, demonstrated and sustained, had not been observed in this country in more than five decades and served to remind us of what is possible when people come together around a common cause and of our responsibility to attend to what is happening in the society around us.

At the time we announced our initiative in support of racial justice, we assumed it would resemble the foundation's other initiatives such as Cyber, Madison, and Economy and Society. We expected to hire dedicated staff to develop a stand-alone strategy for grantmaking aimed at alleviating some aspect of racial injustice. The challenge, as we saw it then, was to identify and address a specific problem within the larger universe of racial injustices as to which the foundation could make a meaningful difference given the time and resources available. In requesting funding, we talked about grantmaking strategies that might focus on building economic power, political power, or both in Black, Indigenous, and other people of color.

Extensive conversations with grantees, other partners, experts, and others in the racial justice field, including movement leaders, have led us to chart a different course. As nearly everyone with whom we spoke recognized — given the breadth, depth, and complex nature of racial injustice — the impact we could expect to have pursuing a stand-alone effort with \$150 million over 10 years would be marginal. Many of the same people encouraged us instead to consider an approach more integrated with the foundation's other work by looking for ways to leverage our existing relationships and expertise in fields in which we have been working for many years. That idea was greeted with enthusiasm by the foundation's staff, which is interested in exploring ways to incorporate a racial justice lens into Hewlett's existing work and, in this way, to better advance our goals while also addressing racial injustice. An approach along these lines, we realized — one that not only cuts across our fields and work, but also shapes how we do that work — should prove more sustainable and have greater impact over time.

II. Addressing skepticism

Before explaining how we propose to tackle such an approach, it is important to recognize and acknowledge the existence of skepticism about our intent and capacity to work on racial justice. The year 2020 reignited a debate about the role of philanthropy in society. Facing a health crisis and economic uncertainty, many asserted that philanthropy had a responsibility to increase annual payout rates in response. Given the disparate effects of the crises discussed above, there were also calls for more sustained general operating support for racial justice and social movement work, as well as support for organizations serving the interests of, or led by, people of color. These critiques were not directed at Hewlett specifically so much as at the field of philanthropy generally.

A great deal of this disapproval and reproach is in reaction to philanthropy's perceived failure to support racial justice and social movement work, and especially organizations led by people of color. In its widely read report, "Mismatched," the Philanthropic Initiative for Racial Equity, a leader on race and philanthropy, observed that "most funding to address racial disparities has fallen within a racial equity framework, focusing on increasing opportunities and meeting short-term needs rather than long-term movement building, systems change, or grassroots organizing."¹ In the same vein, Edgar Villanueva wrote that "because communities of color continue to do the work to address racial inequities, it's imperative that the philanthropic community start to do their part to heal and advance the movement for repair. Leverage their power and influence to support people of color."²

Even when philanthropy does invest in movements, skepticism remains about how funders use their power and influence. In "Movement Capture and the Long Arc of the Black Freedom Struggle,"³ Erica Kohl-Arenas and Megan Ming Francis document how private funders intentionally reshape the agenda and strategies of vulnerable civil rights organizations. To illustrate, they describe how the Ford Foundation remade the California Farmworker Movement of the 1960s, and how the Garland Fund did the same to the NAACP in the 1920s. They worry that today's funders are unlikely to be different, reflecting widely shared doubts about the inclination and ability of funders to play a less controlling, more supportive role.

Against this background, the fact that the Hewlett Foundation has not previously focused on racial justice as such has both benefits and disadvantages. We benefit from not having a track record of committing the kinds of errors and oversights these commentators rightly criticize. But precisely because the commentators don't really know us, we are lumped into the category of "big philanthropy" that is pilloried as rigid, slow, out of touch, and blind to its own faults — supplemented in our case by a sense that we are new to this.

Fully aware of this skepticism, we are nevertheless ready and eager to undertake the effort. We begin with curiosity and intentionality, keeping always in mind the foundation's seventh Guiding Principle to "...approach our role in philanthropy and our responsibilities to society with humility and respect for others." We know we have much still to learn — from each other, from our peers and partners, and from those whose experience is different from ours.

III. Challenges and opportunities

The shift in approach we are proposing for the racial justice strategy has two distinct components that distinguish it from other foundation initiatives. First, it is designed around working collaboratively with all our other grantmaking programs and initiatives. Second, equally important but perhaps less obvious, it involves extending racial justice-focused work we have been doing on our internal processes and culture and integrating that with our external grantmaking and operations. It relies upon people working together in new ways, as well as developing new systems and tools that will influence and shape the foundation's culture and grantmaking. As we often say, "how we do and what we do are equally important," and so we must pay attention to both. The external work will and should be affected by our internal work. As such, in thinking about the challenges and opportunities before us, we have found it useful to think in terms of "people" and "culture" as well as grantmaking.

We say a few words about each of these below before turning to the kinds of specific activities we expect to undertake.

A. People

Our staff is our greatest asset, and we are fortunate to have 125 talented people genuinely committed to advancing the mission of the foundation, including our efforts to address racial injustice. Even so, when it comes to expanding our focus on race internally and externally, supporting our staff will be among our biggest challenges. For while no one is opposed to addressing racism, there are meaningful differences in understanding about both the nature of the issue and the appropriate shape and pace of solutions to address it.

These differences are to some extent an ironic product of the staff's very diversity. Viewed from almost any perspective — race, gender, religion, age, culture, economic background, language — the Hewlett staff is quite diverse.⁴ But this level of diversity brings with it wide variations in experiences and exposure to issues of race and racism. As these issues are both personal and fraught, it would not serve the foundation well for the Culture, Race, and Equity (CRE) team to simply plunge ahead with a plan of its own devising, potentially undermining morale and losing the support of staff members who think we are doing too much, too fast; or staff members who think we are doing too little, too slow; or (worse) both. We cannot advance racial justice in all parts of our work unless we support the development and growth of individuals and teams, which means providing staff with the tools and resources necessary to understand and discuss issues of racial equity. While necessary and important, the level of customization, tailoring, and personalization this will require is not insignificant, including the investment of time.

In addition to helping individuals, we must develop and then engage the full staff, its senior leaders, and the board around a shared vision of what it means for Hewlett to advance racial justice. We will lose credibility and reduce our effectiveness if we are not all pulling in the same direction. As one staff member put it, "every person in the building should be able to speak about the principles and work around racial justice and be an ambassador." We do not yet have such a shared understanding — a lack of clarity that was noted by both our own staff and external partners. This will emerge as we begin the work described below, but as that happens, we'll need to make more concerted efforts to provide clear and consistent communication about what we are doing and why, both internally and externally.

Lastly, staff can benefit from professional learning opportunities focused on topics like navigating conflict and the art of difficult conversations. We have an opportunity to build on the one-on-one coaching work done by our senior leadership team in 2020 by extending it to the full staff. Along with improved communications and messaging, such efforts will be central to helping staff members deepen their understanding of race and racism and develop shared language and a shared understanding of Hewlett's efforts to address them.

B. Grantmaking

There was near consensus that leveraging work in our existing fields offers the greatest opportunity to have a meaningful impact on racial justice, but that doing so well is also the biggest challenge. The potential opportunity is clear: We will award more than \$600 million in grants in 2022 across seven major fields (democracy, education, environment, performing arts, philanthropy, and gender equity and governance), plus cybersecurity and economy and society. An influential, large funder helping advance racial justice across all these fields could have truly meaningful impact, especially over time, given the foundation's long-term commitments to the fields in which it works.

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But the challenge is equally clear: How do we seize this opportunity without diminishing our effectiveness in achieving the existing goals of our strategies? The foundation's efforts in its various fields are both longstanding and important in their own right. The decision we made in 2020 to address racial justice was not a decision to forgo or reduce our support for other efforts; advancing racial justice is an important goal that dually sits alongside, not in place of, mitigating global warming, improving the quality of K-12 education, ensuring women access to family planning and safe abortion, and the foundation's other enduring commitments. This is why our initial approach was to add racial justice as a new commitment in addition to these others.

For reasons previously noted, we want instead to explore ways to advance racial justice as part of our work in these other fields — in effect, finding ways to address dual goals in a mutually reinforcing manner. Many of our existing strategies center on proactively confronting issues of race and inequity, as well as shifting power. This includes, for example, both strategies in our Education Program, as well as our Performing Arts strategies, and our work on women's reproductive health and rights. In other areas, such as Western Conservation, we have found it essential to focus on racial equity. With help from the Culture, Race, and Equity team, our other programs and initiatives will work to identify aspects of their strategy that can advance these dual goals. And over time, we will work to figure out how to make inclusion, race, and power an integral part of our strategy development and implementation processes.

A second challenge arises from the Hewlett Foundation's lack of established relationships with racial and social movement organizations. An external partner observed, “It's about creating trust over time that's developed where the behaviors are demonstrated. How are we learning together as peers and being super honest about what we don't know... By default, any relationship with a funder is always imbalanced because the grantee is always in pitch mode.” Recognizing this is important, we determined the best approach for the strategy was to prioritize multiyear, general operating support to racial justice-focused organizations and to organizations serving communities of color, with special consideration to organizations led by people from those communities.

Hewlett's reputation for providing long-term flexible funding is well established, but we do not have this relationship with many organizations focused on racial justice and movement issues. Another external partner observed, “One of the main contradictions in social change philanthropy: we know the scope of the problem is huge, but we tend not to give long-term open-ended funding that would help organizations actually spend the time to come up with and execute ambitious plans. We are incentivizing and training leaders to think in small achievable chunks, and it shows in the progress we're making.” Effective grantmaking requires being in the right relationship with grantee partners to work together for social change. Long-term, multiyear grants will be an essential ingredient, but this cannot be the only tool. Our staff will also need to cultivate and develop authentic relationships with grantees doing racial justice work.

C. Culture

Hewlett's culture is a source of pride for those who work here, with values embodied in a wide range of practices (e.g., a focus on learning, lean staffing, autonomy and decentralization, multiyear general operating support, and true cost funding for projects) and in written texts (e.g., our [Guiding Principles](#), the [Outcome-Focused Philanthropy guidebook](#), and [Seven Habits of Excellent Work with Grantees](#)).

Another practice reflecting a deep-seated Hewlett value is humility when it comes to telling our own story. It has not been the foundation's style to talk much about what it does, instead letting the work of the organizations we support speak for us. Unfortunately, this leaves space for others to provide the narration, which can result in confusion externally and lack of a shared vision internally. There was a time when this mattered less, but in today's world of social media and fast-moving communications, it has become a problem even in fields we have worked in for decades. And it will unquestionably hamper our efforts as a new entrant into the field of racial justice field, where skepticism abounds.

As we integrate racial injustice into our work, it will be imperative that we do a better job communicating our vision: what we value, how and why we are committed to racial justice, and what we are doing to address it. This is aligned with a broader change that the foundation is seeking to make to use its voice more robustly in pursuit of greater impact.

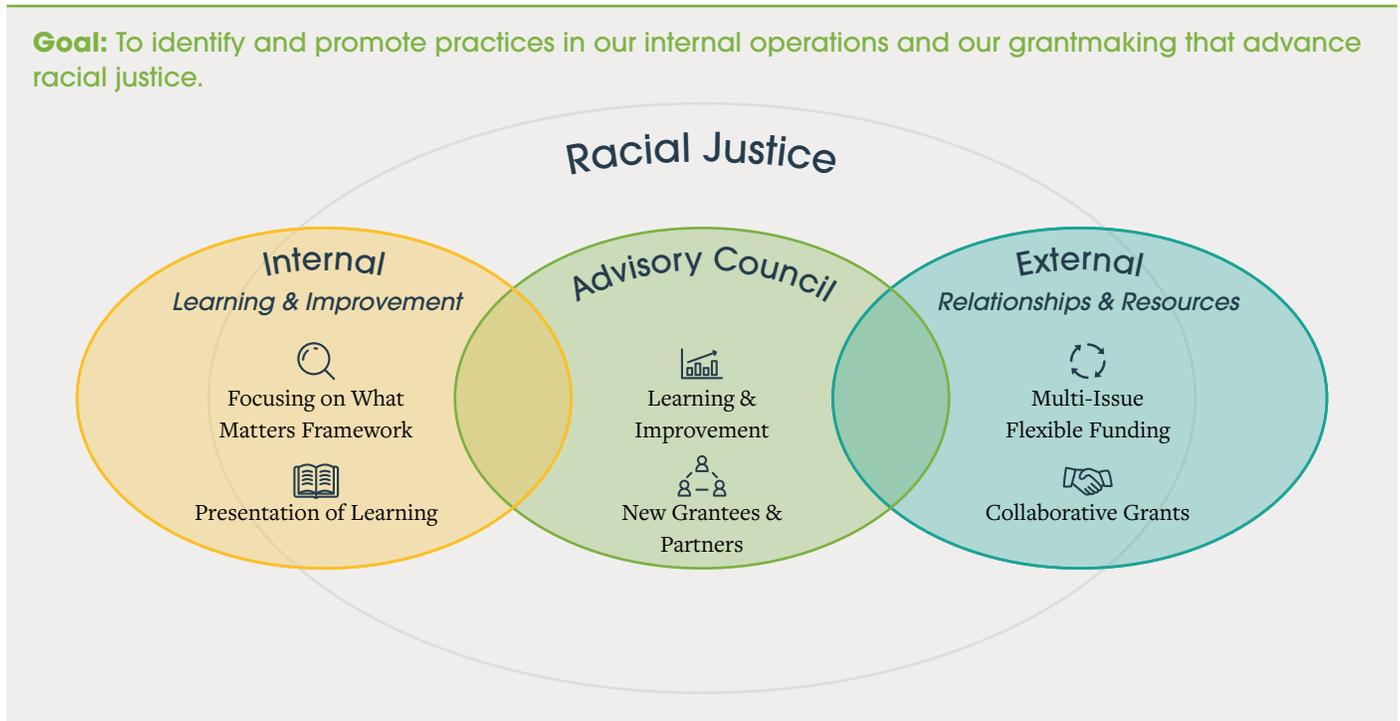
Another challenge could be presented by the Hewlett culture's emphasis on autonomy, especially for program staff. But autonomy is sometimes mistakenly taken as a proxy for working alone, when nearly everything we seek to accomplish requires collaborating with others, whether colleagues at Hewlett, staff at other foundations, or (most importantly) grantees and other external partners. This disposition will be challenging if it shows up in our work on racial justice, a field in which relationship building, trust, and collaboration are considered especially important. Individualistic behavior and "go it alone" approaches seldom work and serve chiefly to undercut one's efforts. We want to empower staff and support its stewardship, but we must at the same time encourage collaboration and work together to solve complex challenges.

IV. Proposed activities to advance racial justice

This is our goal for the racial justice strategy:

To identify and promote practices in our internal operations and our grantmaking that advance racial justice.

As noted above, achieving this goal will engage teams and staff across the foundation in some way or another. Given this, the set of activities we anticipate undertaking are intentionally interdependent, as depicted in the following illustration:



As this image indicates, we propose to undertake a set of interconnected efforts, both internal and external, designed to advance racial justice in both the foundation’s operations and grantmaking. We discuss our plans below, beginning with efforts focused on internal operations, followed by a discussion of external grantmaking and a proposed structure for bridging the internal and external activities to ensure they are complementary.

A. Internal activities

Our internal work is focused on learning and improvement. We are developing processes to facilitate individual and team reflection with an eye on determining how to apply a racial justice lens to enhance and improve their work.

1. The Focusing on What Matters Framework

Each of our administrative and grantmaking teams will use a tool we created, the Focusing on What Matters Framework, to organize and support its work pertaining to DEI and racial justice. The framework provides a common structure and approach, including common language, to help teams examine their diversity, equity, inclusion, and justice (DEIJ) policies and practices and to facilitate team dialogue about how to improve.

The framework divides the inquiry into four shared domains — people and partners, program, policies, and practices — and provides a structure for self-assessment focused on DEIJ. Teams use what they learn through the self-assessment process to inform conversations about whether and how to change their grantmaking, team policies, operational practices, and/or efforts to support team members and external partners. From these conversations, teams then settle on the actions and changes that are most meaningful and achievable. Based on what it learned, for example, the Gender Equity and Governance (GEG) team is looking at ways to address language justice as part of its work in the Global South. Likewise prompted by the framework, and in particular its emphasis on inclusivity, our Facilities team changed providers and began purchasing our carbon offsets from the Yurok Tribe of Northern California, a Western Conservation grantee.

While our efforts prioritize race, the framework is designed to accommodate a wide range of DEI concerns, and we encourage teams to consider gender, age, and other identities as part of the same process. This includes encouraging programs whose work is international to think about how the analysis might apply differently in the countries and regions where they work.

We have only just begun using this process, but our hope is for the foundation’s other teams to complete their initial assessment by the end of the year.

2. Presentation of learning

After teams have completed the initial framework assessment and identified priorities for improvement, they will share their choices and what they learned with the rest of the foundation. To that end, we will employ a modified “presentation of learning” process — a common practice developed in the education field that invites presenters to share their experience and reflect with a larger group about what they learned.

In the “presentation of learning” session, Hewlett teams will share the changes they have chosen to prioritize and describe challenges they encountered in coming to their decisions, as well as things about which they continue to worry. The audience then has an opportunity to ask clarifying questions and offer thoughts and reactions. The presenting team is asked to listen to all the questions and feedback before responding, after which they summarize what they heard and what they are taking away from the session.

Among other things, we will use this process to ensure that every team has an opportunity to hear about (and learn from) what other teams are doing. The process will raise awareness, create a shared learning space, and foster opportunities for collaboration.

B. External activities

The board has authorized us to spend up to \$150 million over 10 years on our racial justice efforts. The vast majority will be spent on external grantmaking and related activities and will take two forms: (a) grantmaking with our programs and initiatives to advance their existing strategies by addressing racial justice; and (b) grantmaking to strengthen multi-issue racial justice organizations whose work overlaps with or complements that of our existing programs and initiatives.

1. Advancing existing goals and advancing racial justice

We experimented successfully with collaborative grantmaking last year, and most of the foundation’s programs and initiatives made at least one joint grant with CRE. We awarded the most joint grants (five) with the Economy and Society Initiative, while the largest single grant was made in collaboration with the U.S. Democracy Program.

The object of these collaborative grants is to advance racial justice in ways or with grantees that further a program’s ability to achieve its existing strategic goals. As [we noted](#) when launching the racial justice strategy in 2020:

“The thing about systemic racism is precisely that it is systemic — meaning it is operating, in some form or way, in all the fields in which we work: education, performing arts, environment, global governance, reproductive health, U.S. democracy and philanthropy itself. We cannot live up to the aspiration of our own first guiding principle—to bring about meaningful, socially beneficial, long-term change—unless and until we grapple with the pernicious effects of racism across all our work.”

In theory, programs ought to want and be able to do this with their existing budgets. They are, after all, always searching for new ways to advance their strategic goals. In reality, however, this type of transformative change will take resources and time to bear fruit. Change is possible, and it happens. But we can use some of the \$150 million in dedicated resources to encourage and facilitate more such exploration in the racial justice arena.

Note, however, that we will be offering these resources for bridging purposes only. The initiative is time limited, and programs cannot treat its resources as permanent augmentations of their budget or use them with the expectation that they are being provided to enlarge their grantee pool. Rather, these funds are being made available for teams interested changing the composition of their grantee pools in ways that advance their strategies and racial justice.

2. Strengthening the racial justice field

Many important and effective organizations in the racial justice field struggle to find funding. In part, this is another manifestation of systemic racism: the continuation of a well-documented historical practice of undervaluing organizations led by people of color and/or working directly in or with communities of color. But it is also partly a matter of alignment, as organizations in the field of racial justice often frame their work and theories of change in ways that do not match the frames typically used by large funders — viewing racism as a problem that must be addressed across multiple systems simultaneously, using levers (such as grassroots movement organizing) that large foundations tend to avoid. The net result has been to stunt their growth, which then further impeded fundraising, because even when their work matches funder interests, they are perceived by some as less likely to achieve impact than historically better funded, white-led organizations.

The Hewlett Foundation’s preference for providing long-term general operating support and for developing strong partnerships with grantees provides a unique opportunity to address this situation in ways that can have significant impact on racial justice and in our areas of interest. After all, sustained over time, even modest general operating support can have outsized effects in enabling an organization to grow and become stronger. The strategy is currently approved to run for 10 years. General support to the right organizations for that length of time could be transformative.

First, we will look for multi-issue racial justice organizations (or collaborations) whose areas of focus overlap with ours. The overlap may be in more than one field, or it may be in a single field but reflect a novel and potentially transformative approach. Unlike the grantmaking we discussed above — in which we will be funding organizations whose efforts directly align with advancing our strategies — funding in this line of work will be open to organizations which may have different theories of change or whose efforts are not fully aligned with our strategies but whose work aims to advance racial justice in two or more of the same fields in which the Foundation currently funds. In addition to promoting racial justice in and of itself, funding these organizations could have three beneficial effects: (a) strengthening these fields overall; (b) generating opportunities for partnership with our programs that influence and contribute to shared learning opportunities; and (c) giving rise to opportunities for strategic alignment on shared goals.

An added reason we feel confident about adopting this approach to racial justice grantmaking is that working in fields we know enables us to benefit from our existing expertise and networks in identifying organizations to support. The Advisory Council below will also play a critical role in this respect, as it will couple our internal expertise in the relevant substantive fields with the expertise of outside advisors on racial justice work and organizations.

Another arena in which we plan to fund involves collaborative efforts that increase resources and help grow capacity for the racial justice field, in particular those that help nonprofits broadly pursue racial equity so as to better achieve their missions.

C. Connection: Advisory Council

We plan to create an Advisory Council to help us build knowledge and credibility in the racial justice field and to inform our grantmaking and learning. The goal is to create a group that will facilitate authentic learning, relationship, and trust building. The Council would comprise a combination of Hewlett staff and outside leaders from the racial justice field that would, we hope and expect, have influence outside as well as inside the foundation. We are still working out important details, including how large the Council should be, which Hewlett directors to include, and which outside leaders to invite.

Among its tasks, the Advisory Council will assist the foundation with internal learning, advise us on grantmaking, and help us develop implementation markers and conduct evaluations. We include racial justice leaders from outside the foundation to improve the quality of our internal work, help guide our external facing activities, and provide a bridge between the strategy's internal and external aspects. Having these members help identify new grantees and establish new connections will also address a widely shared concern that we need input from community and movement leaders in the grantmaking process.

The Advisory Council will also have a role helping teams choose and present priorities under the Focusing on What Matters Framework. We believe our internal work will be made better if we thoughtfully involve these leaders from the racial justice community. It is, however, important for the Council to be aware of and support the framework's use. We also hope the Council's external members will help spread the word — partly to live up to our commitment to transparency, but also because the framework is innovative, and we want to share it with others.

The composition of the Advisory Council is important, and we need to be thoughtful in choosing members. As one program director explained, “there are [social justice advocates] and there are scholars who write about and study racial justice, and I would want both voices included in the process. And, also, people who are good at translating from one modality to the other. Also, folks who can work at the ideas level, work at the advocacy level, work with grassroots forces.” If we choose wisely, our external members (and the organizations they represent) can give the foundation's efforts credibility, as well as providing a healthy accountability.

V. Assumptions

The proposed strategy rests on several key assumptions. Most important is the assumption that the foundation's current board, president, senior leadership, and staff are sufficiently committed to this work to see it through. Given the nature and ambitions of our approach, which requires broad engagement across the foundation, this support will be essential if we are to succeed.

For similar reasons, it also matters that the funding community and society more broadly remain committed to supporting racial justice. We recognize and accept that the heightened attention of the current moment may not last. But it will be important that racial justice remain on the agenda of issues that public, private, and philanthropic leaders deem important. In spite of our nation's history, we are comfortable making that assumption.

Lastly, we assume we will be able to identify organizations and leaders who want to work with us. The Hewlett name may not be familiar to many of the organizations we will want as partners, which could be a problem. But if we are thoughtful and act with appropriate humility, we hope to be able to build high-trust relationships with effective partners.

Making progress on a daunting issue is never easy, fast, or simple. But that has never stopped Hewlett before, nor should it now.

VI. Monitoring and evaluation

Our plans for monitoring and evaluation will be developed later, as we want to formulate our learning questions, expected outcomes, and progress indicators with the Advisory Council.

Appendix. The Focusing on What Matters Framework

Focusing on What Matters is a framework designed to support Hewlett Foundation’s collective efforts to address systemic racism by focusing on diversity, equity, inclusion, and justice. Our response to the racial reckoning that started in 2020, requires us to be more intentional about who and how we partner and support the people with whom we work, while also interrogating our policies and practices to assess equity and inclusivity.

This is a foundation-wide activity that will position us to begin telling our collective story, among other things.

Purpose: The framework is an extension of the work initiated in fall 2020 with the directors working closely with coaches and teams undertaking related efforts, to better understand the impact of systemic racism on our work. The framework is designed to facilitate team dialogue and activate decision making about systemic racism, diversity, equity, and inclusion, and the impact each has on our work.

Diversity, equity, inclusion, and racial justice are interrelated but distinct lens that must be applied across multiple dimensions of our work — people, programs, policies, and practices — which can be challenging to conceptualize , organize, and then act upon. Organizing and disaggregating information is expected to position the team to identify opportunities, patterns, and gaps more easily, which can then be used to inform our work, priorities, and learning. The framework provides a set of guiding questions, using each lens, across multiple dimensions.

While the framework focuses on race due to its deep and persistent connection to political and economic inequities and disparities, the intersectional nature of systemic racism requires that attention be given to gender, ability-status, orientation, and age. Users should not feel limited to questions provided; additional questions are encouraged.

Process: To get us started, each team will provide a *baseline assessment* for at least 2 of the 5Ps (see table below): people and partners, programs, and policies and practices. The baseline is intended to provide a description and status of the team’s work, that will be used for future planning and learning efforts, including organizing and compiling each team and our collective efforts, activities, and progress. The baseline assessment should provide supporting data, where it’s helpful to do so.

The framework is intended to inform the work of the team; it’s not an **isolated activity**. To better support its incorporation into the work, identify one or more annual or bi-annual processes where a meaningful number of team members engage in discussions about team building; recruitment and retention; hiring of consultants or vendors; strategy, or budget development, including implementation or evaluation.

1. Select facilitator to guide discussions around the *Focusing on What Matters framework*. Chosen facilitator must have knowledge, experience, and comfort with leading discussions focused of diversity, identity, and inclusivity. The race and equity coaches or Chief of Equity and Culture are ideal candidates for facilitation, but teams are encouraged to choose based on needs. If outside facilitator is selected, they will be required to complete a brief orientation for consistency and alignment with existing work.
2. The team should respond to all prompts based on current beliefs, mindsets, priorities, and strategy, where appropriate to do so. Summarize results of the baseline for each dimension, identify meaningful opportunities, challenges, and gaps. The summary should also identify one or more priorities areas, change(s) you expect, based on team’s effort, and the question(s) you expect to answer in the next 12-months.
3. Prepare a Presentation of Learning.⁵ Presentations of Learning will be an opportunity for teams to share and learn with members of the senior team. It is an opportunity for colleagues to understand the decision making, including the choices and tradeoffs of each team, as well as areas where they might be growing or struggling. In the inaugural year, teams can elect to have director present on its behalf. In future years, members of the team, other than director, will be expected to present.

The Presentations of Learning will consist of brief description of the priorities, including reasons they were selected, and supporting research and data; resources and supports needed for success; what outcome(s) you expect to change, internally and externally, which question(s) you will learn more about, any risks or tradeoffs that were made. The protocol will use inquiry to illicit supportive and formative feedback for the team.

Resources: There are several data sources and tools that can be used to support this work. The following are a select list of data and other tools that can be used inform and support the work. The first 2 must be used, where appropriate to do so.

- Center for Effective Philanthropy’s, Grantee perception report
- Center for Effective Philanthropy’s, Grantee demographics
- [2020 Change Philanthropy’s, Diversity Among Philanthropic Professionals survey](#)
- [Equitable Grantmaking Continuum](#)
- [Liberatory Design: Mindsets and Modes to design for equity](#)
- [9 questions to help you develop an equity mindset](#)
- Race-equity coach or facilitator report or feedback
- Team or employee pulse survey
- Other source (s)

		Priority Areas			
		Diversity	Equity	Inclusion and Belonging	Racial Justice
PROTOTYPE	People and partners (staff, grantees, consultants, contractors, vendors, etc.)	To what extent, does the racial composition of the team’s people and partners compare with other teams at Hewlett, other foundations, respective industry/field?	Are opportunities available to address racial disparities and inequities among people and partners?	To what extent, are people and partners of color included and welcomed?	To what extent, are people and partners of color positioned to lead?
		In what ways could racial diversity, or other types diversity, meaningfully contribute to team’s programming, strategy, and grantmaking?	What would it mean for the team, strategy, and field to prioritize or not-prioritize these disparities and inequities? Are there reasons the team or foundation should or should not prioritize?	To what extent, are opportunities available for people and partners of color to meaningfully contribute to work?	How are the voices and identities of people and partners of color centered? In what ways, are those most affected by the issue involved in addressing?

	Priority Areas			
	Diversity	Equity	Inclusion and Belonging	Racial Justice
Programs (departmental function within foundation, e.g., human resources, information technology, grantmaking teams, etc.)	To what extent, is racial diversity a consideration in team’s programming, strategy, and grantmaking? To what extent does the team’s work, strategy, or grantmaking align with DEI best practice in field?	Are opportunities available to address racial disparities and inequities in team’s program area, strategy, and grantmaking? Are opportunities available to address other related inequities (gender, orientation, language, ableism)? What would it mean for team, strategy, foundation, or field if we address or not? Are there reasons to address or not to address?	To what extent, does team’s work, strategy, and grantmaking respond to the priorities of people and partners of color? Are there opportunities to make one or more program areas more inclusive?	To what extent, does team’s work, strategy, and grantmaking center the priorities, needs, and interests of people of color or other marginalized groups? In what ways, are those most adversely affected involved in decision making?
Policies (Policies are written and established. Can be internal/external communications, hiring/promotions, recognition)	To what extent, do team’s policies reflect or address systemic racism in context or field? To what extent, do opportunities exist for team to view policies using racial equity lens? How aligned are team’s policies and with DEI best practice in field? (please provide source)	To what extent, are opportunities available to address racial disparities and inequities in policies? What would it mean for team, strategy, foundation, or field if we address or not? Are there reasons to address or not to address?	To what extent, are team’s policies inclusive of staff and partners who identify as people of color? To what extent, do team’s policies respond to or reflect the priorities, needs, and interests of staff and partners who identify as people of color?	To what extent, are team’s policies centering the needs and interests of people and partners who identify as people of color?
Practices⁶ Practices are things that are common knowledge or otherwise understood. Can be internal/external; formal/informal)	To what extent, do team’s practices reflect or address systemic racism in context or field? To what extent, do opportunities exist to view team’s practices using racial equity lens? How aligned are team’s practices with DEI best practice in field? (please provide source)	To what extent, are opportunities available to address racial disparities and inequities in practices? What would it mean for team, strategy, foundation, or field if we address or not? Are there reasons to address or not to address?	To what extent, are team’s practices inclusive of staff and partners who identify as people of color? To what extent, do team’s practices respond to or reflect the priorities of staff and partners who identify as people of color?	To what extent, are team’s practices centering the needs and interests of people and partners who identify as people of color?

NOTES

1. Cyril, M.D., Lyle, K.M., Maulbeck, B.F., and Villarosa, L. (2021, September). “Mismatched: Philanthropy’s Response to the Call for Racial Justice.” Philanthropic Initiative for Racial Equity. https://racialequity.org/wp-content/uploads/2021/10/PRE_Mismatched_PR_141.pdf
2. Villanueva, E. (2021, November 15). “Our nation is very different now than when I wrote *Decolonizing Wealth* in 2018.” YES! Magazine, (100). <https://www.yesmagazine.org/issue/a-new-social-justice/2021/11/15/decolonize-philanthropy-reparations>
3. Kohl-Arenas, E., and Francis, M.M. (2020, July 14). “Movement Capture and the Long Arc of the Black Freedom Struggle.” HistPhil. <https://histphil.org/2020/07/14/movement-capture-and-the-long-arc-of-the-black-freedom-struggle/>
4. Change Philanthropy placed Hewlett as a leader among our peers, and we have become notably more diverse in the past two years. Kan, L.M., (2021, August). “The 2020 Diversity Among Philanthropic Professionals Report.” Change Philanthropy. https://changephilanthropy.org/wp-content/uploads/2021/08/The_2020_Diversity_Among_Philanthropic_Professionals_Report.pdf
5. A corresponding protocol, including description of the process, will be developed for the POL.
6. This is a good source for assessing informal practices: [“That’s how we’ve always done it!” \(A guide to using PTR\) - The Management Center](#)