

JEDI

Justice • Equity • Diversity • Inclusion

Resources for Foundations



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Governance & JEDI

<u>Diversity and Inclusion in the Foundation Boardroom: Voices of Diverse Trustees</u>	This report harnesses the experiences of diverse individuals who served on boards to provide insight and knowledge on how to implement DEI within governance structures. Through the use of case studies, this report focuses on incorporating DEI in governance structures, especially at the board and leadership level and provides practical strategies that can be used by foundations in Canada.
<u>Diversity in Action: A BoardSource Toolkit.</u>	This resource will help you guide your client's board to increase its diversity and adopt inclusive policies and practices. It provides case studies, sample policies and other materials that will create the culture needed to sustain the organization's long-term commitment to DEI.
<u>Diversity in Governance: The What, Why and How</u>	This document explores why diverse boards are important and how to increase board diversity. Of particular note is a case study of a charity called Body and Soul that recruits to their board people with lived-experience. The charity uses a trauma-informed approach to address life-threatening effects of childhood adversity in people of all ages. Approximately, one-third of Body and Soul's board has been directly impacted by childhood adversity. In the case study, the charity founders note that having people with lived experience on their board has helped to push the charity forward.
<u>The real reasons many organizations are still unable to diversify their board, staff, fundraising committees, etc.</u>	Smart commentary by Vu Le on equity blind spots for many nonprofit organizations (including foundations).



JEDI Strategy for Foundations

<p><u>Resonance: A Framework for Philanthropic Transformation</u></p>	<p>A guide to support philanthropic organizations in accelerating a transition towards justice and sustainability by reducing extractive practices and increasing regenerative practices. A great tool for foundations looking to intensify and enrich values-aligned philanthropic practices needed to bring about a “Just Transition” in philanthropy, in other words, philanthropic practices that redistribute wealth, democratize power and shift economic control to communities.</p>
<p><u>Choir Book: A Framework for Social Justice Philanthropy</u></p>	<p>Support funders and philanthropic organizations to align grantmaking practices with social justice values. By Justice Funders.</p>
<p><u>Diversity, Inclusion and Effective Philanthropy</u></p>	<p>This document is a practical guide that can be used by philanthropic foundations to incorporate DEI. It’s a unique resource as it poses key questions that foundations should ask themselves, dispels myths that are perpetuated in the sector, and provides a step-by-step approach to incorporating DEI. In addition, the guide provides case studies of lessons learned from other organizations.</p>
<p><u>From Words to Action: A Practical Philanthropic Guide to Diversity, Equity, and Inclusion</u></p>	<p>This paper covers the four thematic areas set out in the review and provides a practical approach on how to incorporate DEI into organizational practices.</p>
<p><u>Leading by Example: Diversity, Inclusion, and Equity in Community Foundations</u></p>	<p>If you’re unfamiliar with one of the first initiatives to support the DEI work of community foundations – or simply need some great tools to consider how your clients could approach new work – then this report from CFLeads (formerly Coalition of Community Foundations for Youth) is a terrific, albeit older, resource. In addition to discussing what it takes to organize a strategic alignment process on DEI issues, it also looks at specific departmental activities, focusing on opportunities and challenges in donor development, grantmaking, community leadership, and business practices. The report describes key lessons, stories of change within foundations, and individual perspectives from CEOs, trustees, and staff about the work they did as part of the process.</p>



<p><u>Operationalizing Equity</u></p>	<p>If the Foundation is not focused on equity as funders, then how will it ever influence others to remove barriers and end racial inequities in communities? This brief report is meant to capture where the Foundation is at the beginning of 2017— to glance back briefly at the road that has been traveled and to reflect on how Casey has gotten this far.</p>
<p><u>Raising the Bar – Integrating Cultural Competence and Equity: Equitable Evaluation</u></p>	<p>This article seeks to open a discussion of how philanthropy can use an equitable-evaluation approach to apply the principles of the American Evaluation Association (AEA) statement, present the concept of equitable evaluation alongside an approach for building equitable-evaluation capacity, and apply equitable-evaluation capacity building to philanthropy.</p>
<p><u>The Diversity, Equity, and Inclusion Toolkit for Consultants to Grantmakers</u></p>	<p>The DEI Toolkit from the National Network of Consultants to Grantmakers was developed to address that gap and bolster your work with clients to support this transformation. This toolkit is by no means a comprehensive guide. In fact, no resource or tool can quickly or easily fix the complex dynamics associated with DEI. Consider it a jumping- off point, the start of your continuous journey in exploring the many resources available on diversity, equity, and inclusion.</p>
<p><u>State of the Work: Stories from the Movement to Advance Diversity, Equity and Inclusion</u></p>	<p>For the duration of its five-year mission, D5 has provided resources and furthered collaboration to help advance DEI. Within the framework they built, foundations large and small, individual donors, regional and national associations, and organizations that focus on diverse communities have come together to raise the voices of the historically excluded and to pave the way for the field to become more effective in creating opportunities for all communities to thrive.</p>



Tools for JEDI strategy and implementation

<p><u>Power Moves: Your essential philanthropy assessment guide for equity and justice</u></p>	<p>Helps foundations view their strategies and practices through the lens of the power-equity relationship. An extensive self-assessment toolkit to determine how well your foundation is building, sharing and wielding power and identify ways to transform your programs and operations for lasting, equitable impact. It includes ready-to-use guides, anecdotes and resources to help you on your power journey towards high-impact giving.</p>
<p><u>A Checklist of Potential Actions: Incorporating DEI into Your Grantmaking Process</u></p>	<p>Actionable ideas on how to incorporate diversity, equity, and inclusion in grant-making processes.</p>
<p><u>Glossary on Racial Equity</u></p>	<p>Words and their multiple uses reflect the tremendous diversity that characterizes our society. It is essential to achieve some degree of shared understanding, particularly when using the most common terms. In this way, the quality of dialogue and discourse on race can be enhanced.</p>
<p><u>Grantmaking Practices Self Assessment</u></p>	<p>A 2 page checklist to determine which areas your foundation has made a lot, some or no progress towards activating equity and justice.</p>
<p><u>Self-Assessment for Foundation Diversity, Equity & Inclusion</u></p>	<p>D5's Self-Assessment presents five strategic action arenas of proven-effective policies and practices used by foundations across the country to advance DEI. D5 invites your foundation to complete the assessment to: (1) capture your current situation, (2) spark conversations about DEI and what is possible, and (3) identify tangible action steps that will improve your foundation's effectiveness and strengthen its relevance in our increasingly diverse society.</p>
<p><u>Is Your Foundation Leveraging the Power of Differences? Discussion Guide and Assessment Tool</u></p>	<p>This tool is based on extensive research and experience emerging from the Transforming Michigan Philanthropy (TMP) initiative of the Council of Michigan Foundations (CMF). The initiative has developed a discussion and assessment tool to help foundation leaders begin essential conversations about the power of differences and determine the level of their organization's readiness for growth.</p>



<p><u>Executive Summary for the Evaluation of the NYC Fund for Girls and Young Women of Color</u></p>	<p>The NYC Fund for Girls and Young Women of Color Evaluation Report highlights the impact of the Fund to date and outlines recommendations for the field of philanthropy interested in investing in participatory grantmaking models of philanthropy (Recommendations – for the Fund and the Field), page 14.</p>
<p><u>White Supremacy Culture in Organizations</u></p>	<p>A practical tool to understand specific ways that your organization does or does not create inclusivity. The tool names helpful and harmful practices.</p>
<p><u>Antidotes to White Supremacy Culture (White Supremacy Culture, A Summary)</u></p>	<p>Positive alternatives to build inclusive organizational culture, from Dismantling Racism: A Workbook for Social Change Groups, by Kenneth Jones and Tema Okun, 2001.</p>
<p><u>Oxfam Inclusive Language Guide</u></p>	<p>The language guide is divided into thematic sections, though many of the issues discussed intersect and some terms may be relevant to several categories. The guide is based on a set of Feminist Principles for Language Use, which you can find below. It gives examples of how you can put these principles into practice in your writing and in day-to-day conversation. It also includes phrases and concepts which we may not use much at the moment in our work and writing but which are important to understand in order to recognize and challenge intersecting power issues in our work.</p>
<p><u>United Nations Intersectionality Resource Guide and Toolkit</u></p>	<p>A tool for individuals or teams to assess their own knowledge, attitudes and practice, at a programme level as a supplement to existing design, adaptation and assessment processes or at policy level to better understand and address the different and intersecting effects of policy on marginalised persons. Helps us to embrace ‘the messiness of difference’ and accept that “there is no such thing as a single-issue struggle because we do not live single-issue lives”.</p>
<p><u>Targeted Universalism Policy & Practice</u></p>	<p>An alternative to either universal or targeted strategies with the potential to bridge our most intransigent policy divides. How to set universal goals pursued by targeted processes to achieve those goals. Developed by the Haas Institute for a Fair and Inclusive Society</p>



Granting Practices

<p><u>Trust-Based Philanthropy</u></p>	<p>Tools to implement trust-based values within four key dimensions of a grantmaking organization: culture, structures, leadership, and practices.</p>
<p><u>Building on a Better Foundation: A Toolkit for Creating an Inclusive Grantmaking Organization</u></p>	<p>This nuts-and-bolts guide begins by identifying four distinct roles played by grantmaking organizations: funder, employer, community citizen, and economic entity. For each of these roles, foundations will find examples of how grantmakers can successfully build an inclusive organization, as well as simple action steps to help guide your client in becoming a more inclusive organization. On a practical level, the guide gives contact information for the grantmakers featured in these examples and a list of additional resources.</p>
<p><u>Deciding Together: Shifting Power and Resources through Participatory Grantmaking</u></p>	<p>This resource will help foundations examine how to engage in participatory grantmaking and shifting decision-making power to the communities impacted by funding decisions. Using examples and insights from a diverse range of participatory grantmakers, the guide explores the benefits, challenges, and models of participatory grantmaking</p>
<p><u>Grant Making with a Gender Lens</u></p>	<p>In this tool, foundations can learn from their peers in which grantmakers and grantees describe their experiences of using a gender lens in their work. In addition to a clear explanation of gender analysis, the guide shows how this analysis can help shape more effective programs and organizations in fields such as public health, international development, juvenile justice, and youth services. It provides three case studies of gender analysis in action, additional tools for your clients to apply in their own grantmaking, and other practical resources.</p>
<p><u>Funding for Real Change</u></p>	<p>An excellent set of tools and rationale for funding practices that go beyond traditional, short-term project grants. Topics covered: Indirect Cost Recovery, All-In Project Support, Flexible Programmatic Funding, Targeted Growth Support, Flexible Support, and Multi-Year Flexible Funding.</p>

Racial Equity Philanthropy

<p><u>Racial Equity Resources for Philanthropy</u></p>	<p>A resource center to share a variety of resources, tools, articles, thought pieces, and more to help funders on the journey towards racial equity.</p>
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<p><u>Unfunded: Black Communities Overlooked by Canadian Philanthropy</u></p>	<p>Research report provides the first in-depth examination of the relationship between Canadian Philanthropy and Black communities. Our research and analysis suggest that the Canadian philanthropic sector has failed to support the urgent and specific needs of Black communities in Canada.</p>
<p><u>#PhilanthropySoWhite - What Is the Role of White Leaders in Philanthropy in Dismantling White Supremacy?</u></p>	<p>Webinar hosted by Decolonizing Wealth Project. Shares reflections from Edgar Villenueva and three foundation leaders in the USA on their JEDI journeys: Nick Donohue, The Nellie Mae Education Foundation; John Palfrey, John D. and Catherine T. MacArthur Foundation; and Hilary Pennington, Ford Foundation</p>
<p><u>A Call to Action: Trustee Advocacy to Advance Opportunity for Black Communities in Philanthropy</u></p>	<p>Part rallying cry, part action plan, this Association of Black Foundation Executives report advocates for increasing the representation of black leadership among foundations' staff, vendors, consultants, and grantees. Beyond advocacy, it recommends specific strategies for your clients to create opportunities for black professionals to lead and to build a pipeline of talent for the organization. The report also identifies opportunities for black professional services and vendors to do business with the philanthropic sector, as well as ways to expand foundation funding in black communities.</p>
<p><u>Critical Issues Forum: Moving Forward on Racial Justice Philanthropy</u></p>	<p>In this edition of the Critical Issues Forum journal, the Philanthropic Initiative for Racial Equity (PRE) presents reflections of activists and funders on a range of racial justice issues, taking lessons from the past two decades and identifying solutions for the future. Topics include funding at the intersection of race and gender, the leadership of people of color in transforming structural racism in the media, and case studies in how foundations are addressing the root causes of racism and disparities through grantmaking.</p>
<p><u>Cultures of Giving: Energizing and Expanding Philanthropy By and For Communities of Color</u></p>	<p>This report shares the W.K. Kellogg Foundation's journey – its successes and mistakes – in supporting and expanding philanthropy by and for communities of color, giving your clients a case study in how to implement this approach. Using grantee profiles to illustrate the challenges and benefits, the publication describes a pilot grantmaking and field-building strategy known as Cultures of Giving, an effort to seed and grow a community of practice among leaders in the field.</p>



<p><u>How to Get Started</u> <u>20 Envisioning a</u> <u>Race Equity Culture</u></p>	<p>AWAKE to WOKE to WORK: Building a Race Equity Culture. Designed as a reference tool in building capacity to advance race equity, this ProInspire publication provides resources and strategies to help move an organization from commitment to action. It describes how to effectively leverage seven strategic elements that are necessary in building a race equity culture, including senior leadership, board members, the community, metrics, and investment in staff capacity.</p>
<p><u>Paying Attention to</u> <u>White Culture and</u> <u>Privilege: A Missing</u> <u>Link to Advancing</u> <u>Racial Equity</u></p>	<p>An excellent overview of the specific issues of racial equity for philanthropic foundations. Here is a helpful video of one of the authors introducing the article: https://www.youtube.com/watch?v=_8C3lkVjaww</p>
<p><u>A Step-by-Step</u> <u>Guide to Transform</u> <u>Diversity & Inclusion</u> <u>into Anti-Racism</u></p>	<p>5 steps by DEI expert Lily Zheng.</p>
<p><u>How to recognize</u> <u>your white privilege</u> <u>— and use it to fight</u> <u>inequality</u></p>	<p>Peggy McIntosh's TedX talk</p>



Gender Lens Philanthropy

<p><u>Gender-Lens Philanthropy: A practical guide for Canadian foundations</u></p>	<p>This guide is intended to help foundations increase the impact of their grantmaking by increasing the awareness of gender as an important factor throughout the organization and the granting process. There are many ways to apply a gender lens in philanthropy. This guide points to several opportunities and tools, some of which will work for a given foundation, and others will not.</p>
<p><u>Gender Transformative Giving: The Next Phase in Feminist Philanthropy?</u></p>	<p>This resource provides foundations with guidance on how to apply a gender lens to their work. Women’s Funding Network report provides relevant research and action steps to help you guide an organization through that process. It includes a range of practical tools, including a “gender dictionary,” a breakdown of what this approach means for both the grantmaker and grantees, and a dozen steps to take within your client’s organization, with peer funders, and with grant recipients.</p>
<p><u>Gender Transformative Philanthropy</u></p>	<p>In this tool, foundations can learn from their peers in which grantmakers and grantees describe their experiences of using a gender lens in their work. In addition to a clear explanation of gender analysis, the guide shows how this analysis can help shape more effective programs and organizations in fields such as public health, international development, juvenile justice, and youth services. It provides three case studies of gender analysis in action, additional tools for your clients to apply in their own grantmaking, and other practical resources.</p>
<p><u>Grantmaking Assessment Tool for Reproductive Health, Rights and Justice Funders: Increasing Support for WOC Leadership</u></p>	<p>This tool is intended to help grantmakers better support WOC leadership in advancing reproductive health, rights and justice. It builds on existing resources designed to assist funders in bringing a racial justice lens to their grantmaking, and draws on the experiences shared by many who, over several years, have worked within their institutions to build commitment to WOC leadership.</p>



Philanthropy in support of Indigenous communities

<p><u>The Circle on Philanthropy and Aboriginal Peoples</u></p>	<p>Offers membership, conferences, a year-long learning program “Partners in Reciprocity,” research and coaching for both philanthropic organizations and Indigenous-led organizations. The Circle “transforms philanthropy and contributes to positive change between Philanthropy and Indigenous communities by creating spaces of learning, innovation, relationship-building, co-creation, and activation.”</p>
<p><u>The Philanthropic Community’s Declaration of Action</u></p>	<p>The Declaration is meant to be signed by philanthropic organizations who wish to make a commitment to using their philanthropic resources in service to Reconciliation.</p>
<p><u>International Funders for Indigenous Peoples</u></p>	<p>A global donor affinity group dedicated to Indigenous peoples around the world. IFIP builds momentum toward a new movement in philanthropy that recognizes Indigenous communities as high-impact investments.</p>
<p><u>Reciprocity Report</u></p>	<p>2023 report from the Rights Relations Collaborative.</p>

Funding Disability Rights

<p><u>A Guide to Funding Disabilities and Special Needs</u></p>	<p>With both comprehensive background material and practical strategies, this guide takes an in-depth look at how funders can include individuals and families with disabilities in their work. Sections cover federal policy, legal rights, early childhood education, special education, transitions to postsecondary education and adulthood, employment, aging, healthcare, and much more. Though written with an eye toward Jewish philanthropy, the guide is broadly applicable to any foundation.</p>
<p><u>Supporting Inclusive Movements: Funding the Rights of Women with Disabilities</u></p>	<p>This brief explores funding at the intersection of women’s rights and disability rights and offers steps donors can take to ensure that their grantmaking is more inclusive of women with disabilities and to support this emerging movement.</p>



Resources for educating ourselves on justice and equity issues

Workshops and programs for individual reflection on equity

<u>Inner Activist</u>	Offers programs that develop compassionate, reflective and responsive leadership, supporting leaders to skillfully navigate emotions, conflict, power and difference grounded in a commitment to social justice, diversity and equity.
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Indigenous communities, colonization and Reconciliation

<u>kinSHIFT for ALLIES</u>	Two workshop series called “Elements of Truth: BEFORE RECONCILIATION” and “Next Steps in ReconciliACTION Program” offer a welcoming space to continue your journey toward deepening your awareness and understanding of your roles and responsibilities in unsettling colonial narratives and practices within your organizations and personal lives. Offered by Indigenous-led organization IndigenEYEZ: https://indigeneyez.com/
<u>Home on Native Land</u>	A self-guided course about Indigenous justice in Canada. Through a series of 10 videos, cartoons & lessons, you'll take a walk down the back alley of history – and the frontlines of legal action – with Anishinaabe comedian Ryan McMahon.
<u>Nahanee Creative</u>	Offers workshops and organizational development support on decolonization. A range of offerings for organizations at many places in the journey: getting started, strengthening commitment and decolonizing implementation. Indigenous-owned consulting firm.
<u>Mikana</u>	Mikana, which means path in the Anishinabe language, is an Indigenous non-profit organization whose mission is to work for social change by educating different audiences on the realities and perspectives of Indigenous peoples in Quebec. Mikana offers videos, workshops and accompaniment for organizations that wish to improve their understanding and inclusion of Indigenous communities. Indigenous-led nonprofit.
<u>Indigenous Reconciliation Group</u>	Several adult education workshops and coaching on topics related to reconciliation: Increasing cultural competence, addressing racism, supporting Indigenous community capacity. Indigenous-owned consulting firm.



Anti-Black racism and Black communities

<u>Black Lives Matter Montreal Syllabus</u>	BLM resources in French
<u>How to Manage When Things Are Not Okay (And Haven't Been For Centuries)</u>	Advice for leaders and managers of organizations on how to support their teams “at a time when things are not okay” - for example when there is an outbreak of racist violence.

Anti-Asian racism and Asian communities

<u>Project 1907</u>	A set of articles and resources related to Anti-Asian racism, Asian identities, Indigenous allyship, and cross-racial solidarity and movement building.
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Islamophobia and Muslim communities

<u>Islamophobia in Canada</u>	An overview of the recent history and current problems created by Islamophobia.
<u>National Council of Canadian Muslims</u>	NCCM is a voice for Muslim civic engagement and the promotion of human rights in Canada. Up to date information on priorities for reducing Islamophobia and advancing the well-being of Muslim Canadians.

Gender diversity and trans inclusion

<u>How to Talk About Pronouns at Work: A Visual Guide</u>	Pronouns are only the tip of the iceberg when it comes to including people of all genders in your organization, but they make a whole lot of difference. This is an easy-to-understand visual guide. The examples focus on one set of pronouns-- they/them--but the takeaways are useful for any pronouns.
<u>A Guide to LGBTQ2+ Inclusion for HR, People, and DEI Leaders</u>	This comprehensive guide includes leading policy practices for LGBTQ2+ inclusion (e.g. restrooms, dress codes, data collection, health benefits) and tips to create a culture of inclusion.



Gender diversity and trans inclusion

<u>30+ Examples of Cisgender Privileges</u>	<p>An important aspect of trans inclusion is acknowledging cisgender privilege. If you are cisgender, here are some of the ways you may have benefitted from the alignment of your gender identity with your sex assigned at birth in the expected way.</p>
<u>Best Practices for Non-Binary Inclusion in the Workplace</u>	<p>A helpful guide to create an inclusive workplace for non-binary and gender non-conforming individuals.</p>

Intersectionality

<u>Guidance Note on Intersectionality, Racial Discrimination & Protection of Minorities</u>	<p>The Note provides a summary of the concept of intersectionality and its grounding in the principle of equality and non-discrimination and, more broadly, international human rights. It presents examples of the ways in which United Nations agencies have prioritized an intersectionality perspective in their work and makes a series of recommendations for practitioners. Developed by United Nations Network on Racial Discrimination and Protection of Minorities</p>
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JEDI-based Investment of the endowment

<u>JEDI Collaborative</u>	<p>Investment resources that embrace J.E.D.I principles.</p>
<u>New Power Labs</u>	<p>Research and resources for organizations deploying capital (investments, grants, venture capital, bank financing), supporting them through their journey of flowing capital more equitably.</p>
<u>Enhancing Community and Social Benefit by Investing for Impact</u>	<p>A Guidebook for Canadian Foundations, 2023. <u>Version française:</u> Renforcer la communauté et le bien-être social grâce à l'investissement à retombées sociales</p>

