



# *Achieving Equity*

A Weingart Foundation Convening

## **SUMMARY OF THE PROCEEDINGS**

*The Japanese American National Museum  
Los Angeles, California*

MARCH 2, 2017

The summary was prepared for the Weingart Foundation by The USC Center on Philanthropy and Public Policy in partnership with Emerging Markets, Inc.

# *A Movement for Equity*

It is an extraordinary pleasure to organize a convening and to see its influence expand beyond the confines of that day – to take on a life of its own, sparking ongoing conversations and collaboration. Those of us who worked on the preparations for the March 2, Achieving Equity event at the Japanese American National Museum in Los Angeles have been privileged to participate in such an enterprise.

In 2016, the Weingart Foundation announced a full commitment to equity, pledging to base all of our future policy and program decisions on building fair and inclusive communities across southern California. Our reasoning was actually relatively simple: for 65 years the Weingart Foundation had focused on serving the under-served, but conditions were getting worse. Southern California, like our nation, is becoming increasingly divided into separate and unequal places.

The Weingart Foundation has only recently embarked on this journey, and we still have much to learn from our philanthropic colleagues and nonprofit partners as well as allies in the public and business sectors. Achieving Equity was conceived as an opportunity for us all to elevate our dialogue together. We wanted to ask ourselves and one another hard questions that forced us to step back from day-to-day grantmaking and consider the evolution of work on equity. Are the grants and investments we make to nonprofits really opening up new pathways to opportunity for those who are being left behind? Is philanthropy really using all of the resources at its disposal to create a more equitable society?

To that end, we assembled 170 southern California colleagues and partners and surrounded ourselves with some of the foremost leaders and thinkers from throughout the state and across the country who could challenge us with their experience, expertise, and insight.

The idea of “equity” has become an animating focus over the last decade. The deepening contradictions of the economic divide, often expressed along racial or geographic lines, have eroded the middle class in this country and threatened a fundamental promise of American society: that there are pathways of opportunity accessible to everyone. After all, this is what equity means: equal access



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FRED ALI  
PRESIDENT & CEO  
WEINGART FOUNDATION

to opportunity. It does not mean that all Americans will have the same life, or that there will not be “sorting” based on abilities, merit, and effort. But it does mean that all Americans will have equal opportunity to succeed, without which toxic hopelessness festers.

The explanatory power of this loss of opportunity is so pervasive and widespread that it impacts all foundation giving areas – from education to healthcare, from arts to the environment. Whether funders specifically use the word “equity” or refer instead to economic justice, inequality, inclusive markets, disparities, or other approximations, the idea has achieved a critical mass at this moment in time.

Concern with equity has only accelerated as a result of the 2016 presidential election, which both exposed and exacerbated fears about the loss of opportunity for marginalized groups. For foundations and nonprofits engaged in social justice work, there is a climate of uncertainty and anxiety as much of the infrastructure that was built to help achieve equity through healthcare, immigrant integration and the social safety net seem to be under attack. And ironically, much of the anger fueling the attacks seems itself to have been caused by a sense that economic opportunity is disappearing for poorer Americans.

For all of these reasons, equity must be more than just another philanthropic fad. The need to achieve equity, regardless of the words used, must become a dominant imperative in philanthropy – broad enough to encompass the diversity of foundation interests, but focused enough to organize those diverse interests into a shared narrative. It must cultivate a shared understanding of philanthropy’s role in American society relative to government and the market. To be sure, philanthropic resources are small relative to the vast capital flows of the public and private sector; but if deployed strategically, they can leverage these capital flows toward more equitable outcomes. This was the narrative that began to emerge on March 2nd.

## ACHIEVING EQUITY

In the summary report that follows, you will read highlights of Achieving Equity, beginning with the scintillating dialogue between the Weingart Foundation’s Board Chair, Monica Lozano, and the President of the Ford Foundation, Darren Walker. Monica and Darren analyze the immense task of moving a major foundation toward a focus on equity, or as the Ford Foundation has chosen to define the challenge: inequality. Their rich conversation provides insights into the inherent opportunities of philanthropy and limitations more generally, and broadly define the principles of foundation leadership that will help us see greater evidence of equity in our society.

In a far-reaching morning plenary entitled, “Grounded Strategies: Understanding Real Data and Underlying Forces,” Angela Glover Blackwell, CEO of PolicyLink, brought the abstract concept of equity down to earth, explaining why it is not only the “right thing to do,” it is

a superior economic growth model. It has positive implications for everyone, not only the poor and marginalized. Then, Professor Manuel Pastor, Director of the USC Program on Environmental and Regional Equity (PERE) argued compellingly that any discussion of equity must be grounded in real data and a nuanced analysis of demographic change – one that highlights the importance of race. He introduced the data from the new Equity Profile of the Los Angeles Region, a report and data tool created by PolicyLink and PERE, and suggested how it could inform community leaders and policymakers who are working for equity.

In two eye-opening sets of remarks that followed, Lata Reddy, President of The Prudential Foundation and the Honorable Marqueece Harris-Dawson, Los Angeles City Councilmember, explored how principles of equity can be advanced by the private and public sectors, respectively, and reflected on how philanthropy can catalyze or accelerate that process from their vantage points outside those sectors.

The afternoon emphasized the implications of an equity lens for the work of foundations. In opening the conversation, Dr. Robert K. Ross, President and CEO of The California Endowment, explained that a foundation can allow equity to permeate its work without necessarily declaring an explicit focus on equity. He drew on his experience with The California Endowment, where economic inequity is understood to be a root cause and contributing factor to the health disparities that motivates the Foundation's work to ensure health for all.

In a captivating afternoon keynote, Rip Rapson, President and CEO of The Kresge Foundation, described the ambitious turnaround of Detroit, the boldness and flexibility required of philanthropic leaders, the against-all-odds victories that were achieved, and the surfacing of equity as the next great frontier for their work.

This was followed by three of my most inspiring foundation colleagues: Fred Blackwell, President and CEO of the San Francisco Foundation; Phillip Henderson, President and CEO of the Surdna Foundation, and Antonia Hernandez, President and CEO of the California Community Foundation, who shared their foundation's approaches for pursuing equity. These ranged from social investments that leverage the impacts of economic development projects to initiatives addressing concentrated poverty in inner-ring suburbs where nonprofit infrastructure is often undeveloped.

### *Insights and Lessons*

The lessons from the meeting were too numerous to list, but there were at least three insights that seemed to reverberate more than others.

- Although inequity often needs to be addressed at the level of regional systems, it is important to maintain granular data on the many geographic sub-areas that comprise the region. The particular barriers to opportunity vary from community to community, from neighborhood to neighborhood. We need to be able to customize strategies to local circumstances.
- Equity-oriented leadership already exists in the public and private sectors. Although philanthropic resources are small relative to capital flows in these sectors, foundations can strategically interject resources in ways that leverage the government and market for greater equity. Cross-sector approaches are essential to achieving scale.
- The potential for change will hinge on the quality of leadership that steps up to the challenge. Speakers referenced numerous traits, including boldness, courage, diversity, comfort with crossing sectors, willingness to risk reputation, and a capacity to build bridges, link theory to practice, think outside the box, and spark movements. It is hard to imagine a single leader possessing all these traits, so the idea of a new generation of distributed and networked leaders was a recurrent theme.

## MOVING FORWARD

It was always our intention that this convening would only be a starting point. In my closing remarks that day, I sought to lay the groundwork for how we could all move forward together. Beginning with personal commitment, I put forth some next steps that we can take responsibility for at the Weingart Foundation. And I invited everyone in the room to consider how they might tap into the passions that impel them and infuse equity into their work, too.

The response was nothing short of overwhelming. In the days and weeks that followed, more than half of all participants responded thoughtfully to the post-meeting survey. Others chose to follow up personally with their ideas on how to move forward.

Taken together, these ideas begin to suggest, in the most preliminary sense, a blueprint for advancing equity at the regional level in Southern California. The elements of this blueprint include:

- Cultivating a diverse cadre of emerging and established leaders who are conversant across sectors, skilled at spanning the worlds of the privileged and the poor, and able to drive a regional movement for equity.
- Making data widely available through annual PolicyLink/PERE Equity Atlas reports, enabling the sector to respond in a nuanced way to the varied sets of barriers confronted by different populations and places.

- Mapping the underserved geographic areas in Southern California, especially the suburban communities to which poverty has recently migrated, and building their nonprofit capacity to connect with regional opportunities.
- Enacting bold market-oriented strategies that connect low-income households and minority-owned businesses to Los Angeles' immense regional economy and channeling social investment capital to institutions that can more equitably distribute prosperity.
- Identifying public policy issues with significant consequences for equity and then investing in the research, community organizing, constituency building, and advocacy efforts required to advance change.
- Enabling our regional associations of grantmakers – in Los Angeles, as well as San Diego and San Francisco – to help foundations coalesce around the strategies described above and strengthen philanthropy's capacity for collaboration and collective action around equity.
- Ensuring that Southern California remains integral to the national discourse on equity, attracting investments from national foundations concerned with equity as well as contributing to thought leadership in the field.

Fortunately, the building blocks are already in place in our nonprofit and civic institutions that could serve as infrastructure for the coordinated execution of an equity agenda. In fact, it is possible to envision an evolution of this capacity as institutions self-organize around a shared goal of equity. A lightweight and flexible apparatus of relationships among these institutions could work to eliminate barriers to opportunity for disenfranchised populations, connect marginalized communities to major growth industries, and cut pathways to opportunity where now there are none.

We have entered profoundly difficult times when so many of the underpinnings of our free society seem to be in jeopardy. The societal contradictions that drew us to our work in the first place have only deepened. But it is also an era when the potential of collective action to establish equity can be a reality for the people of Southern California, and communities beyond. It is an era that is fortifying our belief that we can create a better world.

I encourage you to join us in this endeavor.



Fred Ali  
President and CEO  
Weingart Foundation

# *Achieving Equity*

## WELCOME

As Fred Ali, President of the Weingart Foundation, opened the convening at the Japanese American National Museum, he acknowledged the 75th anniversary of the executive order that led to the historic internment of Japanese Americans, and its relevance to the current wave of xenophobia.

He stated the purpose of the convening: to elevate the dialogue around equity among foundation and civic leaders in Greater Los Angeles and to inspire collective action. As context, he described the Weingart Foundation's "full commitment" to equity – expanding opportunities by correcting imbalances in access, including the importance of race – and what it will entail. Specifically, he cited the need to address insufficient regional infrastructure, achieving impact at a greater scale, and moving beyond grants to social investments and other tools. Finally, he invoked the idea that Los Angeles represents the future of the country in many ways and that leadership here can have a magnified effect on this movement if we all step up to the challenge.

## KEYNOTE CONVERSATION

To jumpstart the day's discussions, Monica Lozano, Chair of the Weingart Foundation Board engaged Darren Walker, President of the Ford Foundation in a rich discussion about the challenges of redirecting the Ford Foundation to a focus on inequality. She elicited his insights into the leadership decisions that he made along the way up to where they are today.

Framing issues as "inequality" was important for the Ford Foundation because it "broadened the aperture for understanding who was being left behind." The Ford Foundation has always had a view that race and place were the most important lenses for its work. And race and place are still central, but there are other things that are happening in our society that are important to address. For example, Darren pointed out that the only demographic whose life expectancy has gone down since the last census



“ I don't believe the greatest threats to America are ISIS, terrorism, or pandemics. The greatest threat to America is hopelessness, because hopelessness is a consequence of growing inequality in a democracy where the foundational narrative is opportunity, fairness, and social mobility.”

**DARREN WALKER**  
**PRESIDENT**  
**FORD FOUNDATION**

is working class, poor, white women. “If we were to actually look at inequality, we have to incorporate what is happening to them in our work on inequality and to our interventions.”

Darren observed that when shifting the direction of a foundation, it is important to first recognize that institution’s history instead of simply building something new on top of it. So he and his colleagues dug deep into the Ford Foundation’s history. They discovered that the foundation’s history of investing in institutions, ideas, and individual leaders was as necessary as ever and relevant to a focus on inequality today. But, the foundation must challenge itself

to build on that history in ways that can address current challenges. “We institutionalize change by asking really, really hard questions, and being comfortable getting uncomfortable.”



“ The issue of inequality demands urgent attention. At the same time, it is long-standing and pervasive, and it will not be resolved overnight. The question is: how much would funder collaboration on this issue help to accelerate change?”

**MONICA LOZANO**  
BOARD CHAIR  
WEINGART FOUNDATION

Inequality cannot be solved without collaboration, he noted. Problems today are so complex and require interventions that demand the inputs of so many different stakeholders that it’s simply not possible to imagine a single foundation tackling problems alone. Collaboration – real collaboration – is critical. “There can be barriers that make real collaboration difficult. Boards and foundation presidents often want to understand what they are getting, what they are buying. And when you work in collaboration, your ability to designate your input and the output, and isolate that in a way that is linear is very hard. I think that means we have to get comfortable with understanding how we contribute, and not being as concerned about attribution.”

The Ford Foundation has concluded that movement building is essential to addressing inequality, but it has to cut across race, class, and geography. The movement building also needs to include those courageous, privileged, white people... ideally privileged white men,

in a community. Darren emphasized the structural, systemic, and institutional factors that create a sense of hopelessness. “How do we dismantle those structures that continually produce privilege for some and disadvantage for others?” Funders focusing on equity often support organizations carrying out civic engagement and advocacy. These are groups that are making demands and challenging powerful interests. So these foundations need to be more comfortable existing in a contested space.



## GROUNDED STRATEGIES: *Understanding Real Data and Underlying Forces*

Angela Glover Blackwell, CEO of PolicyLink, opened the morning plenary by acknowledging her excitement that we have reached a point where the word “equity” has finally become ubiquitous and mainstream.

She argued that equity is more than the “right thing to do,” it is a superior growth model for society. And because people of color represent our demographic future, their ability to find opportunities and thrive affects all of us. “When we think about how to pursue equity,” she submitted, “race has to be front and center.” The racial dimension of inequality hurts everybody without regard to race or ethnicity, creating a toxic environment for all.

Conversely, Angela pointed out that when we “get it right” for the most vulnerable, we get it right for all. She cited the example of curb cuts that were created to enable the disabled to cross the street at intersections but that have innumerable secondary benefits – for women pushing strollers, vendors pushing food carts, children learning to ride bicycles. Strategies that help one group will invariably provide benefits to all. She argued that everyone must help achieve equity, including those with ample access to opportunity. “The problem is not those left behind, but those willing to leave others behind.”

Finally, she addressed the importance of data in equity work. Where do we find the people who need help? What are the neighborhoods where access to opportunity is most limited? How is the whole nation suffering because of what we have done? And how will all of that improve when we get it right? We need forecast data and the ability to do projections, to inform the work.

Manuel Pastor, Director of the USC Program on Environmental and Regional Equity (PERE), reiterated the point that any discussion of equity must be grounded in real data and a nuanced analysis of demographic change, highlighting the importance of race. He explained why “data cannot be unstuck from the change narrative we are constructing.” It should be used as a basis for dialogue about where we are headed and what we can do.



“ Equity – just and fair inclusion into a society in which all can participate, prosper, and reach their full potential – is a big idea. It is a big idea at a time in which inequality has become toxic. When inequality is hollowing out the middle class, baking in poverty, and eliminating any aspect of hope for social and economic mobility, then inequality has gone too far. Equity is the antidote to inequality.”

ANGELA GLOVER BLACKWELL  
CEO  
POLICYLINK

Manuel introduced the new *Equity Profile of the Los Angeles Region*, a report and data tool created by PolicyLink and PERE based on the National Equity Atlas and to be used by community leaders and policymakers who are working for equity. He explained how the



“ We need to be able to talk about immigrant integration and reentry from the criminal justice system in the same breath as economic development. We need to pursue the economic and social integration of populations that have been left behind, in the places that have been left behind. And we need to pioneer what we want to see happen.”

MANUEL PASTOR  
USC PROFESSOR AND DIRECTOR, USC  
PROGRAM FOR ENVIRONMENTAL  
AND REGIONAL EQUITY

Atlas disaggregates data on demographic change, racial inclusion, and economic benefits of equity for the 100 largest cities, 150 largest regions, all 50 states, and the United States. In terms of income, those at the top of the earning distribution saw their wages rise. Those at the bottom (and middle) saw their wages decline. That pattern is even more pronounced in Los Angeles than in the United States as a whole. Manuel then shared a panorama of changing demographics that have implications for equity work here in Los Angeles County, including the net growth of population from people of color, increasingly from Asia, the incidence of children with at least one undocumented parent and the growing generational differences. This profile underscores that while there are common goals, we need to have nuanced strategies for different populations. For example, while many Latinos are working for subsistence wages, African Americans struggle to find access to employment altogether.

Manuel concluded echoing the point that Angela made earlier: we must become comfortable with promoting equity and economic growth simultaneously. Gains to one group do not need to come at the expense of another.

### *Perspectives from Business and Government*

Lata Reddy, President of The Prudential Foundation, discussed the role that corporations can play in achieving equity. She opened by reminding the audience that in the past corporations were chartered to have social purpose. Prudential, for example, was founded in Newark more than 140 years ago to provide insurance to working families at a time when those families didn't have access to any type of insurance products. Prudential's founder saw an opportunity to meet the societal need by creating the business.

Businesses were supposed to exist to drive growth and prosperity for all, but Lata noted that somewhere along the way, business lost its way. Corporations have come to reinforce a closed economic system and thus bear some of the responsibility for inequity. They are, therefore, essential to addressing inequity if change is going to happen at scale. Corporations need to help

employees consider the societal implications in their everyday decision-making. Corporations can think differently about markets, better meeting the needs of the underserved.

As a financial services company, Prudential is concerned with creating financial security for all, including low-income households. It can start by promoting financial security among its own employees and the employees of customer corporations, like Walmart. More broadly, it can create new products that promote financial stability for low-income households and it can help families acquire and manage capital.

Corporations can also go a long way toward creating talent ecosystems among their employees that utilize and respect diverse talent. As an employer of almost 50,000 people, Prudential is creating pipelines to diverse talent that can be hired and included into its growth. Finally, Prudential which has been based in Newark for more than 140 years, can serve as an anchor institution that provides economic opportunities to surrounding neighborhoods.

“People want to work for, do business with, and invest in companies that have a sense of purpose, businesses that are engaged in societal issues in meaningful ways. These are companies that are not just addressing issues through corporate philanthropy alone but through their business model.”

Los Angeles City Councilmember Marqueece Harris-Dawson reflected on the role of the public sector in achieving equity. He suggested that government can play a much more significant role in making rules that support equity than it can in creating and running programs about equity. The City of Los Angeles, for instance, can set rules about real estate development and how benefits are shared. Do all of the benefits accrue to the investor, which is the traditional model? Can some of the benefits accrue to the whole? Can some of the benefits in fact accrue to low-income individuals who are not investors but may rent out apartments in a development? Rules and guidelines set by government can have an enormous impact on these scenarios.

He described how the labor movement in Los Angeles that put forward and passed Measure JJJ on the November ballot, which requires that buildings of a certain size have a dedicated number of the units for people who make less than the area median income. The measure



“ People want to work for, do business with, and invest in companies that have a sense of purpose, businesses that are engaged in societal issues in meaningful ways. These are companies that are not just addressing issues through corporate philanthropy alone but through their business model.”

**LATA REDDY**  
**PRESIDENT**  
**THE PRUDENTIAL FOUNDATION**



“When we engage the hearts and minds of people – which community organizers have been indispensable at doing – and we match that with the data tools and tools for observation that we have, we can make a lot of progress towards equity.”

HONORABLE MARQUEECE  
HARRIS-DAWSON  
LOS ANGELES CITY COUNCILMEMBER

also stipulates that when the developer hires contractors to construct the building, it cannot pay wages that are so low that the workers could not afford to live in the vicinity of the building. Measure JJJ is an example of how government can set the rules of the road, establishing baseline standards so that developers are not left to figure out on their own how they will help ensure equity.

Government can also do a great deal to ensure equity in the way basic urban services are distributed. “Now we’re moving into a period where we can talk more seriously about equity, partly because we have tools that let us look at equity with a fine tooth comb.” Clean Stat, a city program where cameras can document every inch of every street in the entire city on a quarterly basis, monitoring the level of cleanliness. The information, which can be accessed on its database by anyone, is used by the Department of Sanitation to deploy its resources where they are most needed. “You get closer to something that looks like equity.”

## FROM IDEAS TO ACTION

Dr. Robert Ross, President and CEO of The California Endowment, opened the afternoon session. He explained that while the morning emphasized ways to think about the concept of equity – and the way data can drive change in the private and public sectors – the afternoon would focus on how foundations can translate these ideas into action.

Building on Angela’s earlier remarks about the “curb-cut effect,” he offered his own example. During the 1990s, when the crack cocaine epidemic hit the African American community, the country failed to develop a comprehensive approach to helping people with crack addiction. Instead, incarceration was the most common response. As a result, we were unprepared to respond to the opiate epidemic impacting many poor white people today. Had there been a full-fledged response in the 1990’s, the same approach could be benefiting today’s afflicted populations.

Bob pointed out that foundations need not declare equity as an explicit focus, but can allow equity to permeate its work. He reflected on the importance of equity to The California Endowment’s work and its thinking around economic inequity as a root cause and contributing factor to health disparities. As an example, he highlighted The Endowment’s

approaches around community organizing, statewide policy advocacy, interventions focused on youth of color/black men and boys; and its place-based initiative: Building Healthy Communities – all centered on expanding opportunity.

In the afternoon keynote, Rip Rapson, President and CEO of The Kresge Foundation, recounted philanthropy’s response to Detroit’s “near death experience,” its economic crisis and municipal bankruptcy. Specifically, he described four bold and inventive roles that Kresge played in Detroit: roles that are not so different from the roles philanthropy may need to play in Southern California:

The first role involved helping to “set the table” for discussions about some of the city’s most difficult politically challenged forms of inequality. He described Detroit Future City, a massive community engagement and planning process that involved 100,000 residents and business owners. Funded by Kresge and others, the process charted a course for Detroit’s future when the city’s planning department was unable to do so.

The second role involved deploying the full complement of Kresge’s toolbox to encourage private markets to return to Detroit. This toolbox included not only grants but social investment capital. Rip described the New Economy Initiative, and a range of small business development strategies that started an “economic flywheel.” And he mentioned major social investments in key development transactions.

The third role involved financing infrastructure investments that made the opportunities of Detroit available to more people. Kresge believed that investing in key public infrastructure projects could “trigger the transformative power of places to create the map for vibrant, equitable civic life.” It invested in the reclamation of the Detroit riverfront, converted a traffic intersection into Campus Martius Park, and spurred the revitalization of the century-old Eastern Market. It also invested in a public transit streetcar system, the Q Line.

Finally, the fourth role Kresge played – one which “tore most sharply at the outer limits of philanthropy’s risk envelope” – was its role in the Grand Bargain that led to the mediation of the City’s bankruptcy. The foundation community, led by Kresge and Ford, created a



“ I suspect that most of us are already doing something around equity. Maybe the challenge is to double down or triple down on that. Or maybe there is something new and small to start with – like having a structured conversation about race in your boardroom. Or maybe we are ready for the boldness of trying something we haven’t done before, either as individual foundations or as philanthropy – collectively.”

**DR. ROBERT K. ROSS**  
**PRESIDENT AND CEO**  
**THE CALIFORNIA ENDOWMENT**

\$370,000,000 fund supplemented by \$350,000,000 from the state and \$100,000,000 from the Detroit Art Institute. The funds were used to safeguard pensioners against substantial cuts in their retirement benefits and protected the Art Institute, granting its independence from the city. Philanthropy’s risk capital made it possible to quickly and consensually conclude the bankruptcy within a year.

For philanthropy to step into roles normally played by government was not without consequence. Rip explained that throughout the last eight years, Kresge has been called to task for its lack of accountability and for “swimming outside its lane.” He suggests that these nontraditional roles were emblematic of a much wider recalibration of roles in the leadership of Detroit. Problems normally solved by the public sector were, given the vacuum, being solved by the philanthropic, nonprofit, and private sectors; and those roles might never be quite the same again.

As economic vitality has begun to return to the downtown business district and midtown, Kresge increasingly has heard the criticism that philanthropy was investing in these geographies at the expense of neighborhoods. And many of the people benefiting most from Detroit’s resurgence were young hipsters from out of town, not the long-term residents of the city. Further, Kresge itself was scrutinized for representing the power of privilege.

The foundation has sought to respond to all of these sources of turbulence in its current work by creating strategies that will lead to more equitable development and ensuring that the foundation staff and board is representative of the community and listens seriously to the residents. Rip concluded by saying that while the roles played by Kresge may seem audacious, they are the sort of roles that are necessary in current times.

Antonia Hernández, President and CEO of the California Community Foundation (CCF) explained how CCF pursues equity using other words: “creating opportunity for the poor and vulnerable.” She stated that tackling inequities requires more commitment than traditional five-year plans. In fact, CCF completed their 10-year strategic plan and has renewed it. Although the specific objectives being sought are changing, the core mission and focus is not.

Following on a point made by Manuel Pastor earlier in the day, Antonia explained that CCF



“ This work will require a healthy dose of optimism, even idealism – words that may sound quaint in the coarseness of the current political environment. But under the circumstance, to be anything other than an optimist – anything other than an idealist – strikes me as a profoundly unproductive use of our time.”

RIP RAPSON  
PRESIDENT AND CEO  
THE KRESGE FOUNDATION

has undertaken place-based work aimed at achieving equity, but it has not focused on historic poverty centers like South Central or Boyle Heights. Instead, it has taken a more regional, countywide view and elected to focus on inner ring suburbs, such as El Monte, which lacked the nonprofit infrastructure to initially change local conditions or access resources. She mentioned CDFIs a particularly important form of nonprofit infrastructure that seldom exists in these suburban areas. Antonia also discussed the Immigrant Integration Initiative, which systematically disperses resources where they can be most supportive to immigrants and increase their opportunities.

Antonia expressed her conviction that partnerships with the public sector is extraordinarily important to philanthropy, no matter how messy the public sector is or how difficult the partnerships. “Most of the money that comes to assist the poor comes from the public sector. If you talk about human services need, philanthropy is like venture capital. It in no way can we replace the funds that are put in from the state, the federal government, the city, or the county.”

Antonia concluded with her thoughts on the type of people that philanthropy needs to hire to staff foundations if it they are to make a significant impact on equity. “I hire community organizers, heads of nonprofits, people who have been on the street. I hire people who have worked in the public sector, because that’s the skills and the talent that I need.” These are the individuals who know from real experience how to pull the levers of change and reflect the communities they serve.

Fred Blackwell, President and CEO of the San Francisco Foundation, began by referencing his personal understanding of equity and how it emerged in his life and various occupations. He recalled classmates in school whose potential was not fulfilled, because they did not have the same hope, or the same access to opportunities that he did.

Fred described the San Francisco Foundation’s “Equity Agenda,” which is based in part on a statistical profile of the Bay Area prepared by PolicyLink and PERE. He explained how the foundation is focused on three pathways to equity: People, Place, and Power. “People” is focused on removing the various barriers to opportunity, including systemic barriers like involvement in the criminal justice system, or immigration status. It also means physical



“ Our work is made possible by the generosity of our donors, the dedication and innovation of nonprofits and the vision of the public and private sector partners who have joined us in our mission. Working together with the diverse communities that define Los Angeles County, we can build a future in which all residents have the opportunity to thrive.”

**ANTONIA HERNÁNDEZ**  
**PRESIDENT AND CEO**  
**CALIFORNIA COMMUNITY**  
**FOUNDATION**

barriers – like access to affordable housing, access to good transportation, access to high quality infrastructure – as well as policies that impact a person’s access to opportunity.

“Place” is reflected in a new effort called “Anchoring Communities.” The foundation seeks to make investments that anchor low-income communities and communities of color so that they can be stable and thriving; and, at the same time, it recognizes that these communities are anchors for the Bay Area, resources for the entire region, which in some respects explains the gentrification pressure on these communities today. They are places where people now want to live.



The “power agenda” is designed to nurture equity movements by supporting voter participation, civic engagement, community organizing, and leadership development.

As the San Francisco Foundation set out to organize itself around equity, Fred recognized that grant making was not enough. There was a need to engage the public sector, the private sector and the foundation’s donors. And, most importantly, it was important that the foundation exercise its leadership by bringing its own voice to the policy and advocacy tables, creating partnerships, and taking stands on the issue of equity. “My mom always says, what’s the point of a reputation if you are not going to risk it?”

Phillip Henderson, President and CEO of the Surdna Foundation, reflected on how the foundation has embraced equity, or “social justice” as central to its mission. Coming from the international affairs world and not being completely familiar with the philanthropic culture – what words should or should not be said – he was not expecting people to see the move as something very bold, which they have.

“ We are really thinking hard about what our next phase of focusing on equity means. There is one phase that is about recognizing the word and its importance and being able to lift up the idea. There is another phase that is about executing, taking action, and operationalizing the concepts. The next phase of this for all of us in the room is how to produce results – tangible results for the people that we care about.”

FRED BLACKWELL  
PRESIDENT AND CEO  
THE SAN FRANCISCO FOUNDATION

Now that the foundation has been at the work for nearly a decade, it is possible to recognize what it has meant for the Surdna Foundation to adopt social justice as its defining focus. Social justice after all, is more than a program priority. It is a way of looking at the world that crystallized from collective learning – an organizing element that now informs and guides all the work we do.

There were a number of consequences that were somewhat surprising. The clarified focus



didn't just change how the foundation defined itself. "It profoundly changed what we think is important, how we think about our roles, and how we aspire to do our work." It has also affected who wanted to come to the foundation as board members and employees, the thought leaders the foundation engaged, and the grantees that became partners in both the work and the learning.

The clarity of focus – and the sense that Surdna has a point of view about the world – has driven the foundation to use all of the resources at its disposal from investment dollars – Surdna recently announced a \$100 million allocation from its endowment (about 10% of Surdna's endowment) toward impact investing – to leadership and influence. Finally, he alluded to the fact that a focus on social justice creates its own field of learning and forces the foundation to continually refresh the way it thinks about its work so that it doesn't become stagnant.

## REFLECTIONS AND A CALL TO ACTION

As the meeting came to a close, Fred Ali reflected on his own motivations for pursuing social justice work and on the need to move forward from the day with the commitment to take action. He put forth four commitments that he and the Weingart Foundation were prepared to take the lead on:

- **Data to Action.** First, the Equity Profile of the Los Angeles Region report represents the beginning of a joint project of PolicyLink and PERE to publish regional equity reports on an annual basis. It will provide ongoing analysis that can help guide shared strategy, support advocacy, and measure progress. PolicyLink and PERE will design an engagement process for cross-sector leaders to identify shared data needs and capacities – as well as effective approaches for moving data to action.
- **Regional Programming.** Second, to ensure that equity strategies are integrated at the regional, city, county, and neighborhood level, the regional grantmaking associations – Northern California Grantmakers, Southern California Grantmakers, and San Diego



“ The first step is to ask yourself what your institution cares about. What are your values? Who are you? That doesn't take ten minutes; it takes weeks and months. Introspection and vulnerability stop and start, step forward, step backwards. But only by getting clear on those questions can you get to the question of what you should do. And this is not work you do, finish and move on. The generations before us were at this work, and it is work we must continuously reflect on. This is a life's work.”

PHILLIP HENDERSON  
PRESIDENT AND CEO  
SURDNA FOUNDATION

Grantmakers – have agreed to devote significant programming to equity, growth, and opportunity.

- **Equity Movement Leaders.** Third, to provide the nonprofit sector with the leadership they need to build strong movements for change in their communities, the Weingart Foundation is exploring the development of an “equity fellows” program. This program could support organizers, advocates, and community leaders and will invite other funders to join in this work.
- **National Philanthropy Aligned Around Equity.** Lastly, the Weingart Foundation, while focused on Southern California, is committed to both drawing upon and informing philanthropy’s national dialogue about equity. Although it is unclear what form this commitment may take, foundation executives from across the country have committed to sustain the conversation from the convening and pro-actively collaborate with one another.

Finally, Fred challenged everyone in the room to ask themselves what they can do individually and collectively to infuse equity into their work in meaningful ways. To help make those commitments more concrete, he urged folks to offer their ideas and suggestions as they responded to the evaluation of the convening. He concluded the day thanking all the participants for their time, commitment, and collegueship.

## *Summing Up*

Among the kaleidoscope of ideas, strategies, data, and aspirations covered during the day, a number of important points of emphasis emerged that are helpful as efforts to achieve equity move forward:

- There is a movement emerging to address the growing inequality, and equity is the antidote. It includes a range of terms and points of emphasis – not always explicit – that cumulatively create an opportunity to build a shared narrative to drive collective action.
- Equity is both the right thing to do and it is good thing to do since it is a superior growth model. Hence, everyone has a stake in equity, not just those left behind but those with ample access to opportunity.
- There is much that philanthropy can do to advance equity, but there is a need to understand the nuances informed by the facts, listen and include those that are most impacted, and work together with its nonprofit partners and allies in government and business.

At its core, equity is a value that has driven the work of many foundations in the past, today and tomorrow. The work is never done. Today, there is an opportunity to build a movement that affirms the commitment, sharpens the focus, and develops the leadership and strategies that advance the cause over the longer ter