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PRINCIPLES FOR EFFECTIVE EDUCATION GRANTMAKING

Equity as a Verb: Lessons from and with Grantees

by Minna Jung

Grantmaking Principle: Innovation and Constant Learning





Grantmakers for Education's vision is for all learners to thrive in education systems that are equitable and just, supported by funders who are equipped with the knowledge and connections to advance transformation. Grantmakers for Education catalyzes learning, fosters connections and creates opportunities for members to collectively advance effective, strategic and equity-centered grantmaking in the field of education.

Grantmakers for Education developed its series of case studies on effective education grantmaking as reflection and discussion tools. Cases are not intended to serve as endorsements, sources of primary data or illustrations of successful or unsuccessful grantmaking. In addition, to help make the case a more effective learning tool, it is deliberately written from one foundation's point of view, even though other foundations may have been involved in similar activities or supported the same grantees.

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“Learning environments help those of us with white privilege and philanthropic institutional privilege ground ourselves and our work in community and, in many cases, re-educate ourselves about history...An evolved approach means recognizing that history is storytelling. We must seek out and listen to a wide range of stories, especially from communities of color, if we are to more fully understand how our current, racially unjust system in the United States came about, what has reinforced it, and what we can do to change it.”

–Alison Corwin, Senior Program Officer, Surdna Foundation, [“Philanthropic Leadership Means Following the Front Lines”](#)

Introduction

In part shaped by movements like Black Lives Matter, the crisis of the global pandemic, and the political and social turbulence of recent years, many thoughtful conversations have taken place in the philanthropic sector that question the power and privilege inherent in grantmaking and challenge whether conventional norms and practices in professional philanthropy can be shifted to center racial equity and deepen partnerships with organizations receiving grants. These conversations have prompted the sharing of stories about what funders have learned from and with grantees, and a deeper understanding of how these stories help influence a shift in philanthropy towards elevating the voices of communities of color and acknowledging the complex and systemic challenges presented by racial injustice and oppression. This case study is one such story.

In 2017, the W. Clement & Jessie V. Stone Foundation (the Stone Foundation), an education-focused family foundation located in Chicago, Illinois, changed the format and focus of the annual grantee meeting sponsored by the foundation. While some of the changes were seemingly small, such as merging grantees from all the foundation’s grantmaking portfolios into one meeting instead holding of separate topical meetings, cumulatively the changes were aimed at deepening the relationship between the Stone Foundation and the organizations it funds and bringing racial equity to the forefront of the work. Since then, Stone Foundation staff and

leaders from the grantee organizations have continued to think together about how to shape these convening spaces so that both funder and grantees can forge a closer partnership to address the challenges of system-wide inequity in education through their leadership and respective areas of work.

This case study looks at the Stone Foundation’s effort to co-design convenings with grantees that center racial equity and aim to increase opportunities for populations that have experienced marginalization. For funders, the story of the foundation’s work offers reflections into the challenges and benefits of being more intentional about learning from and with grantees, and what value funders and grantees derive from participating in these conversations with racial equity as both a learning and an action goal.

Embracing Racial Equity Work with Grantees

With the growing attention over the last decade to horrific acts of racial injustice and violence and the birth of movements like Black Lives Matter, many grantmakers began realizing that diversity, equity and inclusion (DEI) principles and practices needed to be embedded in multiple dimensions of how an organization adapts and evolves, with a more explicit focus on racial justice in grantmaking strategies. For example, in a 2020 [study commissioned by the William and Flora Hewlett Foundation](#), DEI emerged as the number one topic of interest for funders, compared to 2016 results from the same survey when DEI didn’t even make the list.” And 2021-2022 [research from Grantmakers for Education](#) showed evidence that 72% of member organizations were using some type of racial equity lens in their grantmaking. Yet, research from the [Schott Foundation for Public Education](#) shows how far there is to go in allocating funding in education grantmaking, with

Founded in 1958, the W. Clement & Jessie V. Stone Foundation honors its founders’ vision to change the world and make it a better place for this and future generations. W. Clement Stone was born in 1902 and grew up on Chicago’s South Side. As a teenager, he moved from selling newspapers to insurance policies, and eventually started the Combined Insurance Company of America, which then became the Aon Corporation in the 1980s. Since the late 1990s, the foundation has concentrated its grantmaking in three areas: early childhood development, youth development and education (with an emphasis on teacher quality and principal leadership). Today, the foundation has an asset base of over \$100 million and distributes over \$5 million in grants each year primarily in Chicago, Boston, New York, Philadelphia and the San Francisco Bay Area.

just 17% going to racial equity in 2018-2020.

Another evolution over the last decade: the field of philanthropy is more openly acknowledging the imbalance of power between funders and grantee organizations, which is often a reflection of systemic racism, and bringing forward ideas around “trust-based philanthropy” as one way to help correct the dynamic. But as a 2020 piece in the Stanford Social Innovation Review, [“Building a Trust-Based Philanthropy to Shift Power Back to Communities”](#) pointed out, “... deploying more money may address deep-seated inequities only at the surface. We need to correct them at their root: philanthropy, like other public and private institutions, needs to reckon with its own power and the imbalances it creates with the very people it strives to serve.”

Against this backdrop of mounting interest in taking more action on equity and a growing openness in the philanthropic sector to explore and shift the dynamics of the funder-grantee relationship, the Stone Foundation’s decision to enter into an equity-focused learning space with their grantee organizations felt like a natural evolution. Perhaps uniquely, however, the Stone Foundation decided to deepen their equity learning in a shared community with their grantee partners. For the Stone Foundation, the close relationships staff had built with grantee leaders over many years helped pave the path towards asking the grantees to join them in focusing their time together on racial equity. And as the convenings continue, while the foundation and the grantees are forming a wide range of impressions and insights about the value of these conversations, all are willing and committed to continuing these equity-focused conversations—together.

The How and the Why of Equity-Focused Convenings: Building on Trust

Since 2009, the Stone Foundation has been gathering the leaders of its grantee organizations for a series of annual convenings. Most of the grantees understood these convenings to be primarily for the purpose of leadership development, with invitations extended to the executive directors, presidents and CEOs of grantee organizations. At first, organizations from the Stone Foundation’s different portfolios gathered separately, with various topics selected for discussion, like the expansion and replication of programs, communications and evaluation. Then in 2016, the foundation made the decision to merge the three meetings into one, and invited organizations from all of its different portfolios in early childhood, K-12 and youth development to the same meeting. The purpose of the first merged convening, which took place in 2017, was stated as follows:

- Advance the long-pursued goal of equity.
- Reduce silos between early childhood, K-12 and youth development grantees through

discussions of shared values around the outcomes for children.

- Create a learning community bringing early childhood, K-12 and youth development grantees together.
- Reflect with K-12, early childhood and youth development grantees on equity, specifically the challenges and opportunities around effective and experienced teachers, leaders and other professionals so that our children may achieve equitable outcomes.

Similar to other organizational evolutions, a leadership transition helped to catalyze this change. In 2017, Sara Slaughter was in her first full year as the executive director of the Stone Foundation and saw practical reasons to merge the separate grantee meetings into one, including lightening the burden of the foundation’s relatively small staff with respect to planning and attending the meetings. She also believed that the grantee convenings could provide the platform for deeper conversations about the longstanding issues of racial equity and privilege that existed not only in the education system writ large, but also in the philanthropic sector. As she put



it, “I spent many years working on early childhood development and education issues and looking at the research on access and achievement challenges faced by communities of color. And then once I started working in philanthropy, I noticed that we as funders set very big goals for our grantee organizations to achieve, but we somehow don’t account for the underlying root causes that created the problems that got us to where we are today. Racial inequality feels, to me, like a very big root cause of our challenges in education—and we need to better understand how organizations built on wealth and privilege are either contributing to inequality or combating it.”

Stone Foundation staff initiated the new convening format with a common practice at foundations: hire an expert facilitator and bring in a renowned subject-matter expert as a speaker. Sherri Killins Stewart, EdD, a consultant and facilitator with decades of experience in education, racial equity and DEI work was hired as lead facilitator and co-designer of the grantee meetings. For the first joint meeting for grantee leaders from all three portfolios, John A. Powell,¹ a well-known expert in structural racism and director of the [Othering and Belonging Institute](#) at University of California, Berkeley, was hired. To maximize Powell’s presence, the Stone Foundation also sponsored a breakfast roundtable discussion with Chicago-area foundation leaders, featuring Powell as the speaker.

At the grantee convening, Powell spoke about concepts of othering, belonging and opportunities and led both grantees and Stone Foundation staff through a version of an equity analysis. While some of the leaders from the grantee organizations had suggested Powell as a speaker for this meeting and found his concepts to be both relatable and powerful as frames for the work they were doing in education, his presence also had the effect of opening up the conversation to other possibilities.

“I think the Powell session gave us a lot of take-aways,” said Sara Slaughter. “He sparked debate about the need for urgency versus the need for patience in terms of making progress on racial equity. But he also sparked reflection on who funders choose to anoint as ‘experts.’ Powell is an iconic expert deserving of all the respect that he has earned. But our grantees had many insights to offer at that same convening, so we came away with a deeper recognition that our grantees were also experts who had valuable knowledge and lived experiences related to many of the same issues he talked about. And yet in the pre-convening breakfast we hosted for our Chicago funding colleagues, Powell was the only speaker invited to present for that group of philanthropic leaders. These experiences made us ask ourselves whether we could further institutionalize a process to identify and elevate our grantees’ voices and the voices of other experts who come from and serve the communities we prioritize in our work.”

While many foundation leaders state that they are committed to learning and feedback from grantee organizations, not all succeed in opening up the conversation so that grantees are heard and valued as much as well-

known experts in the same space. The conversations born out of the convening that included Powell prompted foundation staff and Killins Stewart to deepen the involvement of grantees’ voices in the design and content of future convenings.

Letting the grantees help steer both the how and the why of a learning community on racial equity would not be the default choice for many grantmakers, but for the Stone Foundation, it felt like the right decision. Leaders from the grantee organizations consistently cited the ongoing and close relationships they have with the Stone Foundation staff as a key threshold factor in why they were open to creating a learning community focused on racial equity to begin with. The small staff size of the foundation may be an advantage, as there are four staff people at Stone in total: Sara Slaughter, the executive director, Brian Dixon, the grants manager and program officer, Chris Huaracha, the director of finance and operations, and Brandon Thorne, the senior program officer.

“I can think of funders who I would not be comfortable hosting in my own board meetings. Our board meetings are about ‘real talk.’ It wouldn’t be safe to open myself and my organization’s



“It felt like a greater risk to not at least acknowledge and learn together about the racial equity aspects of the work the foundation and the grantees were doing together in education.”

inner narratives, discussions and doubts just to any funding partner,” said Derek Mitchell, chief executive officer of Partners In School Innovation, a nonprofit organization that helps school districts improve performance and advance equity. “But I would welcome Sara or any other staff member from Stone because they take the time to work in proximity to us. Their posture is more collaborative as they lean in to help us solve problems. And the convenings have been an incredible source of professional development and peer-to-peer learning for me.”

Despite the many examples of the close funder-grantee relationship shared by leaders of the grantee organizations for this case study, none of the Stone Foundation staff felt that bringing racial equity into the conversation was an easy ask to make of the grantee organizations for the straightforward reason that, at that time, all of the Stone Foundation staff were white, and many of the leaders of their grantee organizations are people of color. To ask grantees to embark on an equity learning agenda—together—felt risky, in light of the uncomfortable dynamic that sometimes arises when people of color are inadvertently placed

in the position of educating their white colleagues about issues of racism and equity. However, it felt like a greater risk to not at least acknowledge and learn together about the racial equity aspects of the work the foundation and the grantees were doing together in education. “We were petrified,” stated Slaughter. “I thought to myself: ‘What have we done?’ But I know this for certain: any time I’ve immersed myself in listening to and learning from grantee organizations, at different points in my career and in different contexts, I’ve come away understanding far more than I did before.”

In addition, Slaughter has a practical view of what can and can’t be changed about the funder-grantee relationship. “Should we acknowledge that much of the wealth that fuels philanthropy comes from systems based on economic and racial injustice? Absolutely, that’s part of the work,” she said. “But can we go back in time and change the circumstances that led to this unequal concentration of wealth and power in the first place? No. I think that we have to acknowledge where we came from and figure out how to leverage our resources and our voices in more inclusive and equitable ways moving forward.”

In designing the equity-focused convenings with grantees, the Stone

Foundation staff intentionally designed components to be signals of trust, openness and mutuality, including the following.

Hiring a facilitator experienced in both content and equity work: The Stone Foundation hired Sherri Killins Stewart, who has an impressive track record in the education field—from 2009-2013, she served as the commissioner for the Department of Early Education and Care for the state of Massachusetts—and has worked on several initiatives with early childhood leaders on racial equity.

Killins Stewart said she was given wide latitude to design and facilitate the equity-focused convenings. She worked closely with an advisory committee of the grantee leaders and met frequently with Stone Foundation staff, to discuss agendas and speakers. “The idea behind these convenings, with the top leaders from these organizations, is that they can learn from each other in a safe space, and then take back what they’ve learned to their organizations,” said Killins Stewart. “We had to agree on some parameters upfront, like focusing on racial equity and not taking on other equity challenges while in the room, although we understood that what we learned about racial equity could also be applied to other equity challenges. We also agreed to focus our work together

“At our most recent convening, we talked about the frame of mirrors and windows. When funders look in the mirror, what do we see? We see structures of wealth and privilege that have contributed in many ways to inequitable systems. So in order to advance equity across entire systems, like education, we needed a window—we need to see things from our grantees’ point of view. They are at the mercy of a sector that anoints them as winners and losers. Instead of holding them at arms’ length while making funding decisions, why not try to see how things look from their point of view?”

—Sara Slaughter, Executive Director, the W. Clement & Jessie V. Stone Foundation

on our external impact. Overall, I think we agreed that we would all enter the room as learners, with foundation staff.”

A culture of non-competitiveness and openness: “We understand that these convenings are a non-competitive space,” said Lea Austin, executive director for the Center for Child Care Employment at University of California, Berkeley, a longtime grantee of the foundation. “The foundation staff have communicated clearly that attending these convenings isn’t about showcasing our grant work or making the case for continued funding, and it’s my experience that it’s a space to speak freely without concern that something I say will be held against me or others as grantees. The meetings are designed so that we can learn from each other and also be open and vulnerable with each other about the challenges we face in our roles and in the field as a whole.”

Shared responsibility for the design and the agenda of meetings: For each of the equity-focused convenings, an advisory committee of leaders from the grantee organizations either volunteer or are asked to serve to choose topics, plan agendas and/or recruit or serve as speakers. And since the meeting in 2017 with John A. Powell as the featured speaker, the grantee convenings have also highlighted the expertise and experience that each grantee leader brings to the discussion. “I appreciate that at these convenings, we tackle difficult questions and that the foundation has made the space for us to both lead and fully participate in these conversations,” said Sylvia Puente, president and CEO of Latino Policy Forum, an organization that works for equity, justice and economic prosperity on behalf of Latinos in Illinois.

In a [Philanthropy News Digest opinion piece](#) co-written by Sara Slaughter and Derek Mitchell, CEO for Partners In School Innovation, they describe this concept of sharing the responsibility for these equity-focused convenings

as “getting proximate.” One of the most important lessons learned from getting proximate, they wrote, is:

“Our convenings helped us all step out of the hierarchical paradigm and into a shared problem-solving frame where the Foundation rolls up its sleeves and digs in with grantees as participant learners to support the organizations’ problem-solving from a side-by-side modus rather than the typical “accountable partner” paradigm. In equity work, ceding power to those to whom your work should benefit is a necessary prerequisite to lasting change. Being physically present and in the community as a participant with communities of color is critical. Not only does it foster trust and produce more egalitarian interactions, but it unleashes the knowledge and power of those living challenges in context. A key principle of improvement is that those closest to the work know most about how to meaningfully improve it.”

“...the paramount value of the equity-focused convenings may be about creating a different model of philanthropy...”

What has changed as a result of these equity-focused convenings between Stone Foundation staff and grantee organizations? In equity-focused work in the social sector, what often ends up being highlighted are the intentions of those involved—the challenges and opportunities that people encounter in social change work, and the recognition that inequity is everywhere and yet progress on equity sometimes can feel frustratingly slow and also, devastatingly

consequential at times. For the Stone Foundation and the organizations supported by the foundation, the paramount value of the equity-focused convenings may be about creating a different model of philanthropy—a model that is less hierarchical, creates more space for vulnerability and openness and, most importantly, begins to articulate what shared accountability for progress on racial equity might look like between a funder and an organization working on the front lines.

Embracing the Complexity of Racial Equity for Learning and Action

Grantmaking organizations exhibit a wide range of preferences and practices when it comes to the issue of their proximity to grantee organizations. Philanthropist Mackenzie Scott [made headlines](#) by giving extremely large grants in recent years, doing so with a more hands-off approach that allows freedom to grantees but little involvement on her part. Grantee organizations, too, often wish for more funding and less interaction with funders, for the practical reason that soliciting and reporting on grants take time away from the central work of the organization.

However, big social problems like education, healthcare reform and climate change, and the issues of racism and inequality that underlie almost all social challenges, usually require multiple levers of influence and action, and funders are uniquely positioned to leverage their influence and gather disparate nonprofits working within the same field to connect with each other. Not only can convenings and conferences help nonprofits align on the big picture of what they’re working to achieve, they can also help nonprofits clarify and strengthen their unique role within the complex ecosystems in which they work.

None of these benefits can materialize, though, if the convenings are not valued

by funder and grantee alike. Brian Dixon, grants manager and program officer, and Brandon Thorne, senior program officer, talked about the value of the convenings in the context of what they've seen and observed from other foundations. "Other foundations have sponsored really good grantee convenings," said Dixon. "But it does feel like our convenings have overcome some roadblocks of hierarchy and lack of transparency that are common in the funder-grantee relationship. We've made mistakes, definitely. But we've created a culture and norms where it's okay to make those mistakes and continue learning through the relationships we've built with our grantees and through how we've designed and run our convenings."

For Thorne, having these sorts of conversations in partnership with grantees is an essential prerequisite for the shared work to advance equity. "In the philanthropy sector, there are no set requirements for how a funder might introduce oneself to a field, what accountability they might have to the communities they seek to support, how they could show up as allies to the causes they care about," he said. "For example, 'defund the police' came across to me as a widely misunderstood and polarizing phrase where the side-by-side conversation about what that phrase meant and why it mattered never happened. I felt opportunities to build bridges between different points of view were lost. What I learned from the leaders in the room is that, while this might be true for me, that for people of color, being patient while points of view are carefully being reconciled does not feel viable. Having these types of conversations with leaders of our grantee organizations is about defining and expanding my responsibility, as a funder, to go beyond making a grant and reading the interim reports."

Thorne's story, in addition to capturing both the value of shared learning and the willingness to engage in honest conversations that many find



uncomfortable, also illustrates the constant tension between urgency and patience present in all collaborative work on racial equity. This tension, which Stone Foundation staff and grantees discussed at the 2017 meeting featuring John A. Powell, requires both a full acknowledgement of the endemic and structural aspects of racial injustice and a respect for the different perspectives and feelings people bring to discussions about how to achieve progress.

The tension was also reflected in some of the comments from grantees when asked what they valued about the convenings. "I think the convenings have made us all feel as if none of us are alone in the work we are doing—that we understand how difficult policy change is, and that the pace of change can sometimes feel agonizingly slow," said Sylvia Puente, president and CEO of Latino Policy Forum.

Heather Anichini, president and CEO of the Chicago Public Education Fund, said, "One of the things we get a sense of at these convenings is how big the challenges of racial inequity really are. For example, public funding disparities that affect organizations [representing communities of color] versus other organizations make you wonder how much more direct funders can be in

advocating for action and change. While I appreciate the humility and reticence that the [Stone] Foundation staff bring to these convenings, I also wonder if that same reticence can be unintentionally holding back a more direct, action-oriented agenda on racial equity."

For the most part, however, grantees expressed a great deal of gratitude and appreciation for the convenings. People most often said that they found the convenings to be valuable for leadership development and for networking with and learning from the other leaders in the room. Verneé Green, the CEO of Mikva Challenge, a national organization dedicated to civic engagement for young people, said that she was excited to be able to participate in the convenings after she was appointed as executive director for Mikva's Illinois chapter. "I didn't want to pretend that I had all the answers to all of the challenges that one faces in a top leadership position," said Green. "This has been an incredible opportunity for me to learn from other leaders of color and other people working on the same things. Most of all, there is something significant in the way that the Stone people take up space in those rooms. They let the grantees lead on the agenda. They make it clear that they are there to be learners along with the rest of us."

Other grantees found different value. “I have often asked myself, why do these meetings work so well?” said Amy O’Leary, executive director for Strategies for Children, an organization dedicated to helping all children in the state of Massachusetts access high-quality care from birth to age five. “I think it has to do with one, creating an environment where none of us feel as if we are competing for funding. Two, the Stone staff enter the room with grace and humility and clear respect for who’s in the room. Three, the facilitator insists on authenticity in these conversations. We are not supposed to ‘perform’ for Stone, this is an opportunity for all of us to bare our souls to each other. And four, asking us to lead the advisory committees to help design the focus and agendas for the convenings helps surface the critical questions we all face in our daily lives of running these organizations.”

With all of the glowing reviews of how valuable—and just plain enjoyable—the grantee convenings have been for Stone Foundation grantees, leaders from the grantee organizations did not offer many concrete equity-related take-aways or outcomes from the convenings. When asked about what equity-specific concepts they could take from the convenings to their own organizations, people most often talked about where the Stone Foundation convenings fit in with their own equity journeys as leaders. Amy O’Leary, for example, has been working on early childhood development for decades, and said, “I feel like talking about and working on racial equity has changed a lot since I first began in this field in the 1990s. I was aware that there were differences, of course, and I knew how I was perceived as a white, young educator working with mostly Black and brown children and families.” For O’Leary these days, the convenings sponsored by the Stone Foundation are an important precursor of the partnerships and alliances that need to happen to advance racial equity in early childcare policies and practices, but they are one component of many. What she does appreciate is the follow-through

on racial equity that has been supported by the foundation. Acknowledging that the foundation does not make big grants relative to some other funders in this space, O’Leary said, “They’ve given us flexible small grants to think about how to truly operationalize equity—like a speakers’ bureau they funded for our networks to help us all learn together about racial equity and how to move forward.”

In fact, concrete take-aways from the equity-focused convenings may be precisely beside the point of how these convenings were conceived and designed. “We didn’t ask them to do anything or learn anything specific from these conversations related to racial equity,” said Sara Slaughter. “We wanted to give them the space to think about equity as a verb, and how it applies to their own leadership, learning and networking. And we also wanted to support them in thinking about equity beyond the grants we give them, which is why we gave flexible small grants for things like speaker bureaus and additional organizational development.”

Lukas Brekke-Miesner, executive director of Oakland Kids First, a youth development organization, offered a different take about whether the foundation could be more active—or passive—on pushing for specific racial equity goals. “I really think the convenings are about how we lead, especially during these uncertain and troubling times,” he said. “We all have to grapple with equity and racial justice issues in our different areas of work—for me at my organization, those questions take the form of giving more power to young people, and ensuring that they’re equipped to lead when their time comes. But I’m not sure how I would react if Stone was more open or explicit about their role in advancing the equity topics that we discuss at the grantee convenings, because I’m not sure it’s their place to do that. For me, the value of these convenings is about how they highlight the common threads that connect all of us—like what it means to be a leader, what we care about and even, quite honestly, how we achieve work-life balance and find ways to rejuvenate ourselves and stay committed to the work we do.”



For the Stone Foundation, the continued focus on racial equity is important for two reasons: One, it signals the staff's growing commitment to and understanding of the complexity and breadth of racial injustice, and how race and privilege shape education systems and institutions. Two, this work is part of their recognition that the relationship they want to build with their grantees is a dynamic and ongoing endeavor, rich in learning rewards but at the same time, highly complex. In other words, embracing the complexity of social change work and resisting overreliance on measurable, clear results within defined outcomes may be a fundamental part of the work of making progress on racial equity.

This idea of embracing complexity came up recently in a conversation that took place as part of series sponsored by the William and Flora Hewlett Foundation featuring their staff and others talking about race in their work and lives. The conversation, called "[Pioneers in Education Philanthropy](#)," featured Kent McGuire, director of the Education Program at the Hewlett Foundation, and Na'ilah Suad Nasir, president of the Spencer Foundation. During the conversation, Nasir offered the idea that the "deep equity lens" McGuire brought to his work as an education grantmaker also required a much more complex diagnosis of the problems of education, which in turn meant much more ambiguous solutions. In response to that point, McGuire responded, "I'm endeavored to reveal the complexity that is real, that is actually there. Which, of course, then makes trying to work on it from a philanthropic perch more complicated, right? The incentives, oddly, in philanthropy, I would argue, push you to run away from the complexity."

Lessons Learned

For funders in particular, the lessons from the Stone Foundation's equity-focused convenings may be especially useful as they undertake their own equity

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journeys to work in greater allyship with their grantees. Following are some lessons from and with grantees.

- Concrete examples are needed for how funders can share power and build trust: The Stone Foundation staff see themselves as a small player in the education grantmaking field, relative to other education funders. And funders understand that the money they give is only a part of the solution set when the problem is as complex as intergenerational racial oppression. However, funders may still find it challenging to acknowledge and circumvent philanthropy's origins of hierarchy and privilege, and to do so, funders must own the need to moderate power and influence in order to enter into deeper partnership with grantee organizations working on the front lines of social change. Not only did the Stone Foundation staff invite the grantees to co-lead on designing the convening agendas, they also intentionally entered the space as learners, not experts, and have committed to maintaining that learner perspective into the future.
- Doing equity work with grantees is helped by open, trusting funder/grantee relationships: Grantees shared many examples of Stone Foundation staff showing up for them with respect to shared problem-solving and discussions outside of the convenings. They spoke about how they invited foundation staff into strategy discussions and about staff helping them work through infrastructure questions like board development and financial systems. These sorts of interactions and relationships undoubtedly helped provide a precedent for the honesty and vulnerability that many spoke about as a characteristic of the convening discussions.
- Embracing the complexity of centering racial equity in the work helps share accountability for change between funder and grantees: Many foundations like to demonstrate impact by setting strategic targets and metrics according to specific time horizons and for specific population groups. However, the systems and structures surrounding education in the United States have been shaped by decades of unequal privilege and power. As a result, philanthropic organizations often ask grantee organizations for specific targets and deliverables but are less specific about their own roles in achieving social change goals. The ongoing deep exploration of racial equity through the Stone Foundation's grantee convenings helps to mitigate this imbalance; the foundation has committed to exploring and understanding ways it can better leverage its role as a funder to be a more effective

partner to grantee organizations, while resisting more conventional notions that racial disparities in the education field can be definitively closed any time soon or with any one grant.

- The value of embracing racial equity as an action and learning process: As Sara Slaughter, executive director of the Stone Foundation said, “One of our biggest take-aways from these conversations is that equity is a verb, not only a noun

or a destination.” In other words, the desire to center racial equity in the work of social change—to achieve more equitable outcomes in education, for example—requires a long view of what the work involves and what needs to happen to dismantle structural and systemic factors that contribute to inequality and shifting attitudes and norms and policies over time.

“I feel as if we have entered a shared problem-solving space where the

funder rolls up its sleeves and digs in with grantees as participant learners,” said Slaughter. “It makes us feel—and I hope the grantees feel this, too—that we are working with them side-by-side on solving these problems, and they’re not the only accountable partner in creating the change. And I will continue to find ways that we can help leverage our influence and networks, beyond the dollars we give, in ways that solidify our commitment to our grantees.”

Study Questions

1. What are the potential risks and rewards for foundations to embark upon equity-focused learning in partnership with grantees?
2. How do the Stone Foundation’s relationships and convenings with their grantee organizations help advance progress on racial equity in the education field? What should other education grantmakers consider if they are interested in advancing their work with grantees in similar directions?
3. What are some barriers and incentives often found in philanthropy for deepening trust and relationships between funders and grantees? How have you navigated those barriers?
4. What are the different ways grantmakers often define and use expertise? How have different types of expertise informed your work with grantees and on education initiatives?
5. What are the major drivers that cause foundations to resist the complexity of ongoing work on racial equity?
6. How can a foundation balance the tension between the urgency of social change work and the patience needed to navigate complexity in the work?
7. What are the challenges and advantages for both funders and grantees when a funder is an active problem-solving partner, sharing accountability with grantees, versus being a more “hands-off” funder?
8. How can funders use their influence to advance a shared purpose with grantees while keeping the power dynamic in check and attention on grantee work?

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Sherri Killins Stewart, Director of Systems Alignment and

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Derek Mitchell, CEO, Partners In School Innovation

Amy O’Leary, Executive Director, Strategies for Children

Sylvia Puente, President and CEO, Latino Policy Forum

Sara Slaughter, Executive Director, W. Clement and Jessie V. Stone Foundation

Brandon Thorne, Senior Program Officer, W. Clement and Jessie V. Stone Foundation

Endnotes

¹ *john a. powell intentionally uses lowercase letters to spell his name as a way of communicating that “we should be part of the universe, not over it, as capitals signify.”*

Principles for Effective Education Grantmaking

1. Discipline and Focus

In education, where public dollars dwarf private investments, a funder has greater impact when grantmaking is carefully planned and targeted.

2. Knowledge

Information, ideas and advice from diverse sources, as well as openness to criticism and feedback, can help a funder make wise choices.

3. Resources Linked to Results

A logic-driven “theory of change” helps a grantmaker think clearly about how specific actions will lead to desired outcomes, thus linking resources with results.

4. Effective Grantees

A grantmaker is effective only when its grantees are effective. Especially in education, schools and systems lack capacity and grantees (both inside and outside the system) may require deeper support.

5. Engaged Partners

A funder succeeds by actively engaging its partners — the individuals, institutions and communities connected with an issue — to ensure “ownership” of education problems and their solutions.

6. Leverage, Influence and Collaboration

The depth and range of problems in education make it difficult to achieve meaningful change in isolation or by funding programs without changing public policies or opinions. A grantmaker is more effective when working with others to mobilize and deploy as many resources as possible in order to advance solutions.

7. Persistence

The most important problems in education are often the most complex and intractable, and will take time to solve.

8. Innovation and Constant Learning

Even while acting on the best available information — as in Principle #2 — a grantmaker can create new knowledge about ways to promote educational success. Tracking outcomes, understanding costs and identifying what works—and what doesn’t—are essential to helping grantmakers and their partners achieve results.

Grantmakers for Education is the nation's largest community of education philanthropists. EdFunders members make up a diverse network of almost 300 public, private and community foundations, and others, that support public education. Working in partnership with our members, we pursue systemic approaches to equity and racial justice in education in order to make a positive impact on learners everywhere. We are a hub for new connections and ideas, a compass to help members navigate their work, a spur for collective action and a champion for positive change in education. For more information or to learn about membership, please contact us at information@edfunders.org.



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