

APPENDIX 2

The Barr Foundation: Detailed Findings and Recommendations

BARR FOUNDATION

Using KNOWLEDGE, NETWORKS and FUNDING
to Build a Better Boston for All

ORGANIZATIONAL PROFILE

The Barr Foundation is a private family foundation whose mission is to enhance the quality of life for all residents of Boston, Massachusetts. The foundation anonymously grants approximately \$45 million per year to nonprofit organizations in the Greater Boston region. It uses a systems, knowledge, and network-based approach to its work, and to date has focused on three critical challenges:

1. **Providing Quality Education:** Emphasizes the Boston Public School system, alternative educational approaches, early education, and out-of-school programs.
2. **Making a More Livable City:** Concentrates on increasing the quality and quantity of open space and water resources, developing environmental citizenship, supporting environmental justice, and facilitating regional development planning and urban design.
3. **Enhancing Cultural Vitality:** Focuses on cultural projects that enhance the foundation's educational or environmental goals, support major and mid-sized institutions, promote diversity, or foster civic engagement and community cohesion.

In addition to these three programs, the Barr Foundation devotes a small portion of its giving—through the Annual Community Support (ACS) program—to a broad array of organizations that make a positive contribution to the quality of life in Boston. The foundation also has a fellowship program to honor the contributions of distinguished and diverse leaders in Boston's nonprofit sector.

Prior to engaging in the ARC-PRE assessment, the foundation was known for its leadership role in advocating for cultural competency and inclusiveness in the Boston Area. However, staff members sought to deepen the foundation's understanding of race and to identify ways to integrate racial justice more fully throughout the foundation's work.

ASSESSMENT METHODOLOGY

The ARC-PRE assessment team spent nine months reviewing

internal foundation materials and conducting four levels of analysis:

- Reading 35% of staff write-ups of grants recommended to the trustees in 2005-2007;
- Reviewing 22% of grantee folders;
- Inviting 14% of current grantees to participate in a focus group or interview, and also to complete a survey; and
- Reviewing the foundation's internal materials (theories of change memos for each portfolio, cultural and racial inclusiveness report, intermediary survey, information about the Barr Fellows program, etc.).

The assessment team selected a diverse group of grantees representing each portfolio, different levels of explicitness in racial justice approaches, and various organizational sizes, as well as a small sample of grantees where the majorities of staff were people of color. We also interviewed select intermediaries.

FINDINGS ON THE FOUNDATION

Leading up to the ARC-PRE assessment, Barr was seen as a leader on diversity and inclusion issues in Boston. It had conducted trainings on diversity with its staff and grantees, and had increasingly emphasized the importance of racial diversity in staff conversations with grantees. It had diversified the ACS portfolio to include more immigrant/refugee organizations, most of which are of color; and was supporting a diverse group of leaders through the Barr Fellows program. However, the foundation had yet to develop a contemporary theory of how race works in Boston; how race issues play out in the city's power dynamics, distribution of resources, policies and institutional practices; and how a clear understanding of these dynamics might change the structural solutions that groups pursue.

Without a clearly defined vision of a racially equitable Boston, the foundation risked creating messages that were counterproductive, especially in asserting that traditional, predominantly white organizations should reach out to communities of color. In Barr's publications, on its website, and through other forms of communication, the foundation made two arguments for diversifying organizations. The first was a moral one, that including people of color is simply the right thing to do. Without an understanding of the historical roots of racism, and an analysis of race and power, this argument can become

paternalistic, presenting inclusion as a simple matter of the haves sharing with the have-nots. The implication is that the organization will change the lives of people of color, but they will have no reciprocal effect on the organization.

The second argument for diversity focused on organizational self-interest. In its external communications, the foundation asserted the need for groups to become diverse in order to perpetuate themselves, because demographics were rapidly changing. While there is nothing wrong with these notions on the surface, they fall short of describing and arguing for a new set of social, political and economic arrangements in which communities of color have the power to actually change institutions.

Focusing the foundation's messages on diversity and cultural competence encouraged implicit rather than explicit approaches to racial justice. The assessment team found that both internal and external communications needed a clearer structural analysis. Foundation staff identified the need for more cohesion and clarity about what is meant by codes such as "cultural competence," and whether and how they can make a structural argument for diversity to grantees. The foundation's communications about its racial equity interests were largely implicit, which created too much room for confusion and for the reinforcement of existing power dynamics and structures. While in a few instances, Barr program officers were beginning to send out the message that having staff of color was a requirement for receiving a grant, even they were unclear about how boldly they could assert that bottom line.

Beyond the foundation's grantmaking portfolios, the Barr Fellows is an innovative program that has provided significant opportunities to leaders of color in the city. In funding the fellowship, Barr was acting on its own network theory – that a tightly knit, diverse group of contemporary leaders would become an influential planning and political force in the city's future. However, like the other elements of Barr's work, the fellowship does not address racial inequity or justice goals explicitly. Likewise, its Annual Community Support portfolio, which responds to needs and interests beyond the foundation's stated funding strategies, does not include any explicit focus on racial justice, although staff members have worked to prioritize more refugee and immigrant serving organizations, as well as organizations led by people of color.

FINDINGS ON GRANTEEES

Explicit Racial Justice Language and Diversity

The assessment placed grantees into categories based on how explicitly they incorporated a racial equity analysis and language in their work:

- **Low:** 39% of grantees assessed (through surveys, focus groups, or interviews) fell into this category. Race and ethnicity is not on these organizations' radar screens based

on how they frame their grant projects and describe their organizations' work. If language regarding race and ethnicity is used, it is either in the broadest frame or through coded language: *under-represented*, *at-risk* etc. Most of these organizations have limited discussions about race or diversity. Typically they do not use any of the terms — *racial disparities*, *racial equity*, *discrimination* or *racism* — in their external communications. A minority of the organizations use the terms *racial disparities* (25%) and *racial equity* (33%). When asked why they do not use explicit racial language, 60% said the focus of their work is broader than race and 20% said the focus of their work is not on race and/or equity.

- **Medium:** 45% of grantees assessed were placed in this category. These organizations mention race and ethnicity in their grant descriptions, typically in terms of the clients/constituents with whom they work on the project. Most organizations focus on representational diversity and in some cases discuss the importance of cultural competency. Some mentioned equity work while even fewer defined the work with a racial disparity lens. The terms they use most are *racial equity* (60%) and then *racial disparities* (40%). Only 27% of these organizations use the terms *racism* and *discrimination*. When asked why an organization is not using the terms, 47% indicated "the focus of our work is broader than race," and 30% did not respond. Comments included: "[race is the] underlying subtext of our work but we focus our messages on broader, more concrete issues," and "our work requires pulling people together."
- **High:** 16% of grantees who participated in the assessment fell into this category. These organizations are explicit about equity in their definition of the problem, the strategies used for the grant project, and their organizational descriptions. All of these grantees regularly have informal discussions and had some formal training about racial equity and/or diversity issues. Most of these organizations' trainings use an anti-racism approach and/or an equity analysis. The two terms that these grantees use the most are *racism* and *discrimination* (both 80%) and *racial disparities* (60%). They all checked "other" in explaining their reasons for choosing their terminology: some organizations said they used *ethnicity* rather than *race*, one group talks about *justice vs. equity*, and another explained, "We let our work speak for us rather than words."

Grantee Patterns in Addressing Racial Justice

- Barr grantees focus more on creating the conditions for diversity and inclusion internally rather than achieving racial equity in the larger society. There is a widespread assumption that having a staff, constituency, or clientele of color will automatically bring in a racial analysis.
- Among those grantees with an *implicit* approach, the most

common response to why they did not use explicit language was that their scope of work was either broader or narrower than race. Many Barr Foundation grantees felt that an explicit racial analysis would be divisive. Some did not respond to the question about why they did not use racially explicit terms. There is a strong possibility that these organizations simply do not know that organizational and societal inertia have marginalized racially explicit language, and that these grantees have accepted that status quo rather than attempting to change it. If organizations are focused on issues like poverty, the environment, or gender, and do not see their connection to race, this might point to a lack of understanding about how race, class and gender systems reinforce each other. While race is a factor in most systems, grantees clearly need help in identifying its role in those systems.

- There was significant feeling that the pool of skilled people of color is too limited to meet the diversification needs of grantees. Some groups are pushing for pipeline strategies to grow that pool.

Grantee Interest in Racial Justice Capacity Building

Several grantees expressed interest in building their capacity to go beyond diversity. Grantees would like the foundation to play even more of a convening role, given that Barr has been a catalyst and connector for several partnerships, collaborations, and organizational relationships in the past.

Intermediaries

In addition to grantees, the assessment team interviewed five intermediaries that Barr funds to support grantees. Several important themes emerged from the interviews. The providers themselves use a great deal of implicit race language. They themselves struggle to maintain diverse organizations. They also felt that progressive and liberal non-profits are resistant to addressing racial issues, and more complacent about their performance in this area than in the commercial sector. In general, they felt that racial equity and diversity work attracted too few resources. These intermediaries used explicit racial terms even less frequently than grantees did. Four intermediaries who were interviewed responded “no” on all terms; the remaining organization responded “yes” on all terms. All noted that the terms were only used in specific contexts. Several indicated using stand-in words such as *justice* and *social justice* along with euphemisms for communities of color such as *underserved communities*, and *communities with less access*.

RECOMMENDATIONS FOR THE BARR FOUNDATION

- ***Move Beyond Diversity to Racial Justice***: This shift includes reworking the foundation’s theories of change to more explicitly address the role of race and racism in creating or blocking social change processes; and building

the capacity of grantees to create effective collaborations to address structural racism, beginning with trainings on how to identify the role of race in the systems in which grantees work and on how to participate in advocacy projects. The foundation should also consider making racial justice questions an explicit part of grantee convenings and the Barr Fellowship program.

- ***Refine the Grantmaking Process***: This recommendation suggests that Barr create a consistent grantmaking system across all programs and staff that establishes clear expectations and accountability measures. This change includes adding questions to the grantmaking process to identify an organization’s understanding of race dynamics and how they influence the systems in which the organization works. It also includes creating a method of collecting demographic data on all grantees as well as sharing the foundation’s theories of change to ensure that grantees understand their role in systems change.
- ***Review Grantee Convenings and Capacity Building***: The foundation supports intermediaries that help to build the capacity of its grantees in the field. This recommendation includes setting racial equity standards for both grantees and intermediaries that are aligned with Barr’s own, to ensure that grantees are receiving strong and consistent support for racial justice work from the foundation and from technical-assistance and capacity-building organizations.
- ***Align the foundation’s internal and external communications to be more explicit***: The foundation first needs to determine how it wants to centralize a racial justice strategy, and how explicitly to craft its message. The alignment of messages involves creating consistency between internal and external communications, creating a set of racial equity principles to guide the work, and taking time to evaluate racial justice language and framing throughout the foundation’s communications.

INITIAL IMPACTS AND NEXT STEPS

Since the board presentation on the ARC-PRE assessment findings in May 2008, the Barr Foundation has been moving forward on various recommendations. Barr Executive Director Patricia Brandes described how using explicit language has opened the foundation to new knowledge and strategies at every level. “It has given us a certain boldness in terms of both policies and practices, and it has given us a learning agenda to pursue,” she said. “As we look at issue areas, we now very much take a racial justice lens to them.”

Following the assessment, the foundation completed major revisions to their grantmaking process in time for the first set of 2009 proposals. All grantees are now being asked to submit organizational diversity forms. Sensitive to the time and effort

that nonprofits dedicate to grant applications, the foundation asked grantseekers to use an already existing form that was part of a general application from Associated Grant Makers, a regional association of foundations. Staff has also revised grant proposal questions to invite grantees to be explicit about whether and how racial justice analysis affects their work. The template that program officers use to write up grant descriptions for trustee review also now includes space for information and reflections on the racial justice implications of proposals.

Following is a new question that the foundation asks of its grantees:

The Barr Foundation's mission is, "to build a better Boston for all." For Barr, this includes confronting inequities, especially those related to race. We asked you to submit an Agency Diversity Data form because Barr is committed to diversity and inclusion. Yet, we recognize that greater diversity and inclusion is only a first step. To truly "build a better Boston for all"—a Boston in which distribution of resources, opportunities, and burdens is not determined or predictable by race—we also need to influence and change the institutions and structures that perpetuate racial inequity. We hope to learn from those, like you, in the field. How does your thinking about racial equity inform how you develop and implement programs?

On the recommendation to move from diversity to justice, Barr is now exploring major revisions to its environmental portfolio, rethinking the opportunities to support environmental work using a racial equity lens. "This is an example of how the assessment really brought racial justice to the forefront," said Program Officer Mariella Tan Puerto. "We could have just said 'climate change is the big issue we need to work on, so let's focus our strategies on whatever interventions have the biggest impact on reducing greenhouse gasses.' Instead, we decided that racial justice had to be an integral part of the analysis. This helps us focus our resources on interventions that address climate change, while also meeting needs and creating opportunities for communities of color."

The changes to Barr's grantmaking process are accompanied by changes in how staff communicate the foundation's racial justice priorities to grantees. Program Officer Klare Shaw described a conversation with one grantee from an organization that was not very integrated. "In these situations," says Shaw, "I let grantees know that while we don't have hard and fast rules about how integrated organizations need to be, we do expect them to grapple with these questions, and to demonstrate progress over time."

There are also some instances where grantees are interested in changing. "In one case, the organization was thinking about how to come back to us with a stronger racial justice analysis," Puerto said. "Clearly, they are thinking about it, and they're

reaching out to different networks to help them craft a more intentional approach to racial justice."

The foundation is also in the process of reworking its theories of change to use more explicit racial justice language, and will then further shift its capacity building and technical assistance work with grantees to focus explicitly on racial justice.

Recently, Barr convened a daylong gathering of 36 nonprofit leaders from the Boston area, working with a consultant who uses an explicit structural racism analysis. The group took the whole morning to learn about structural racism, and then spent the afternoon using a structural racism lens to analyze the economic stimulus package.

There is also a plan for ongoing internal training to develop specific racial justice skills (e.g., how to do a racial justice analysis of an organizational budget) and ongoing work to create a process for evaluating and making use of the new incoming data and information about racial justice from grantees. The foundation is also partnering with another local funder that has taken on racial justice, to share lessons learned, best practices, etc.

Indeed, Barr's new racial justice framework is transforming how it engages with its peers in the foundation world. In addition to partnering with a fellow local foundation, Barr staff are speaking explicitly about racial justice within various philanthropic circles. At a conference of funders invested in smart growth, for example, Puerto was invited to talk about Barr's work on green jobs. "I wanted to talk about our racial justice lens without turning people off with jargon," she said. "So, as I spoke about the issue, I shared data on the ways people of color are disproportionately cut off from opportunities and suggested that foundations and society at large should consider allocating resources to address the conditions that create those imbalances."

Brandes also described changes to how the Foundation talks about its identity. She offered the example of revising the PowerPoint presentation about the Barr Foundation. "We used to have a whole piece in our presentation on being inclusive of diverse voices, and we just had a meeting to talk about how we change that to be more about racial justice." ■

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- [Barr Foundation Racial Justice Analysis – Executive Summary](http://barrfoundation.org/usr_doc/Barr_Foundation_Racial_Justice_Analysis_-_Executive_Summary.pdf)
- [Barr Foundation Racial Justice Analysis – Presentation](http://barrfoundation.org/usr_doc/Barr_Foundation_Racial_Justice_Analysis_-_Presentation.pdf)