

# DEI Questions in the Grantmaking Process

Assembled July 17, 2019

## Meyer Memorial Trust

### Equity

Meyer Memorial Trust is committed to a flourishing and equitable Oregon where all residents have fair access to opportunities to learn, work, prosper and reach their full potential. Meyer's investments under the Housing Opportunities portfolio are framed within an overarching [equity lens](#), and prioritize supporting work that centers the needs, experiences and leadership of those most impacted by housing disparities, including culturally-specific organizations and those serving communities of color.

How this affects grant processes and funding decisions varies across different targeted funding opportunities, but decisions are generally guided by the following equity considerations:

1. **Outcomes:** How does the project benefit communities and populations most impacted by housing disparities, particularly low-income people of color?
2. **Partnerships and collaborations:** Do culturally-specific organizations and impacted communities have genuine opportunities to inform, partner, and/or lead on the project?
3. **Applicant organizations:** What is the demographic composition of the applicant organization's staff and board? Is a commitment to diversity, equity and inclusion apparent in organizational plans, policies or other documents like an equity policy or statement?
4. **Project design:** How were impacted communities involved in the project design or issue identification?

In order to track how well we are meeting these equity objectives, we will gather data from applicants and grantees on each of the above points. We aim to collect both quantitative and qualitative data to provide the most robust picture possible about how our funding is expanding opportunities and resources for impacted communities.

[RFP questions related to equity]

### The Applicant

Describe the applicant's current highest-priority efforts to further diversity, equity and inclusion both within the organization and in the broader community.

### Equity and Broader Impact

- Describe how the project will strengthen the effectiveness, number and diversity of voices engaged in local and/or statewide policymaking and advocacy around affordable housing.
- How have communities most impacted by the issue(s) that the project seeks to address been involved in defining the problem(s) and developing the proposed strategies?
- *FOR CAMPAIGN LEADERS PROPOSALS ONLY:*
  - How will the project benefit or inform the broader fields of affordable housing, advocacy and/or community organizing?

### Demographic Data

- To what extent do the demographics of your organization's staff, board and volunteers (as applicable) reflect the demographics of the population(s) you serve and the demographics of the broader community in your service area?
- Staff and Board Demographics:

- What percentage of your staff are people of color? \_\_\_%
  - What is the source of your staff data?
- What percentage of your board are people of color? \_\_\_%
  - What is the source of your board data?
- Please tell us about your data collection process.
- Please tell us about any additional demographics about your board and staff that are important to your organization.

## The Denver Foundation

### FROM GRANT APPLICATION:

How does your nonprofit engage community members and constituents in planning, programming, and making decisions?

What challenges, if any, have you encountered in engaging community members and constituents? What are you doing to overcome them?

How does your nonprofit advance racial equity?

What challenges, if any, have you encountered to advancing racial equity? What are you doing to overcome them?

### SAMPLE FROM SITE VISIT QUESTIONS:

- Please describe the efforts undertaken internally by [ORGANIZATION X] to advance diversity, inclusion and racial equity from the board to staff level. This includes, but is not limited to recruitment practices for board, staff and leadership that reflect a racial equity lens.
- Please describe the efforts taken externally to serve people of color experiencing [homelessness, DV, etc.] who face heightened impediments to accessing services, e.g. distrust of law enforcement, lack of support networks and financial resources, etc..
- Please share how you include people with lived experience of [homelessness, DV, etc.], including people of color, into program development, leadership and organizational decision-making. Please provide some examples.
- Please share your external efforts to engage communities facing additional barriers, including those of trust, to connect with services.

## United Way of Metropolitan Dallas

### Equity and Inclusion Question

How does your program contribute positively to equity and inclusion and move us toward a thriving community for all? (2,000 Characters): \_\_\_\_\_

- Describe how the program operates in an equitable and inclusive manner.
- Describe how clients are selected or what requirements clients must meet to receive services from this program.
- Describe any disqualifications that prevent clients from receiving services in this program.

We adopt the Independent Sector's definition of equity: "The fair treatment, access, opportunity, and advancement for all people, while at the same time striving to identify and eliminate barriers that have prevented the full participation of some groups. Improving equity involves increasing justice and fairness

within the procedures and processes of institutions or systems, as well as in their distribution of resources. Tackling equity issues requires an understanding of the root causes of outcome disparities within society.”

We adopt the Foundation Center’s definition of inclusion meaning “the degree to which diverse individuals are able to participate fully in the decision-making processes within an organization or group. While a truly ‘inclusive’ group is necessarily diverse, a ‘diverse’ group may or may not be ‘inclusive.’” -

- We ask for the Board Roster to include gender and race/ethnicity.
- We ask for an unduplicated client list that breaks out race/ethnicity as part of the application and grant reporting.

## Crown Family Philanthropies

- How does your staff (or board) represent the community that your organization serves? To what extent is this a priority for your organization?

## United Way Worldwide

We did a survey in 2018 - key questions are:

- Is your Board as diverse as it should be in order to fulfill the organization's mission
- Do you have strategies in place to build diversity into the Board? (gathered Board demographics via survey - Gender, Race, Ethnicity, Age, Sexual Orientation, Veteran Status)
- What types of resources/tools does your United Way use in your diversity and inclusion efforts?
  - Support or Resources from UWW
  - Resources/Tools from Community or Agency Partners
  - Trainings by Local Organizations
  - Online Resources
  - Resources/Tools from Corporate Partners
- How does your United Way track staff diversity?
  - periodic surveys
  - personnel forms at time of hire
  - one time survey
  - no mechanism
- Does your United Way have a staff member who is accountable for equity, diversity, and inclusion?

## HealthSpark

The Innovation Lab grants are an important strategy in meeting two system goals: 1) Providers increasingly collaborate to achieve impacts through strategic, intentional and systemic alignment; and 2) improved and more holistic understanding of consumers and changing county demographics to improve systems' responsiveness, build momentum and shift narrative.

Does the applicant/lead organization appear to have the capacity necessary to achieve the project goal(s)? How does the project make safety net services more accessible or effective to undeserved, underrepresented and diverse populations in the county?

What is the potential for this project to influence other providers or key stakeholders; does the project include evaluation and data collection for continuous learning? Can a pilot adapt or expand to more consumers or sites in the future; what lessons and learning does the project offer for future work? and how can this work shape future commissioned research, advocacy or communications?

In addition to these innovation lab grant questions, we have a separate application for our system leadership capacity building program. There are 8 sessions that include 1) leading systems change; 2) strategic thinking and systems change and engage staff in systems change; 3) the role of financial planning and management in systems change; 4) the role of the board in systems change; 5) assessing opportunities for organizational sustainability; 6) managing diversity and inclusion; 7) developing outcomes-based evaluation of your programs and services; and 8) reflecting on your organization's journey in systems change.

## PetSmart Charities

- What is the community's support/sentiment of the proposed project?
- How will the community facilitate the project?