

Black EQUITY Initiative

FINAL LEARNING REPORT



PREPARED FOR
The JIB Fund

PREPARED BY

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Initiative Overview

Launched in 2017 with a cohort of 15 organizations, the Black Equity Initiative outlined two primary goals:

- 1 Address conditions that perpetuate institutional racism against Black people.
- 2 Build a community of learning and practice that strengthens work on the ground and informs the broader philanthropic field of best practices to advance racial justice at scale.

Report Background

Social Good Solutions, in partnership with our research partner, Dr. Ange-Marie Hancock Alfaro (USC), identified **four learning questions** at the onset of the work to track over the course of the Initiative. At the time of the BEI's launch in 2017, it was the only philanthropic effort in California solely dedicated to the Black community¹. In addition to funding Black-led and Black-serving organizations confronting systemic racism in three issues areas (Education, Criminal Justice Reform, and Workforce Development), it was envisioned that the BEI could share its lessons with the field and serve as a model for the philanthropic sector by building both consciousness and goodwill among funders to deepen their investments in social justice efforts led by and for Black people.

This report outlines our learning questions and documents our findings. Data were gathered from semi-annual and annual grantee reports, and one, final summative report as part of the Initiative's culmination.

Funding Approach

From the onset, The JIB Fund pursued a "learning for action and continuous improvement" approach. The grant program was designed based on input generated from focus groups, a comprehensive literature review, 17 key informant interviews and three site visits to LA-based organizations identified in the research and by peers as exemplars in the field. Grants were issued as one-year awards for the first two years (2017 & 2018) and then as a two-year award for the final two years.

OVERARCHING STRATEGY Fund efforts that advance collaborative solutions and elevate a shared vision for systemic equity and opportunity in the Black community, evidenced by:

MOVEMENT BUILDING Developing networks of individuals and organizations; using the power of collective action to alter the relations of power to enact cultural, economic, and/or political change.

SYSTEMS CHANGE, TARGETING

INSTITUTIONAL RACISM Building the individual, organizational and collective community resiliency needed to continue pursuing systems change work, confront racial injustice and combat burnout.

COHORT DIVERSITY

Issue Diversity

Education	6
Workforce	3
Criminal Justice	6

Regional Diversity

Los Angeles	12
Inland Empire	3

Organization Size

2017 Budget size at initial award

Under \$500K	2
\$500K-\$1M	5
\$1M+	8

JUNE 2019 Budget size at final 2-year award

Under \$500K	1
\$500K-\$1M	2
\$1M-\$5M	9
\$5M	3

Significant increases to annual organizational revenues between 2017-2019

All numbers self-reported.

	2017 Annual Revenue	2019 Annual Revenue	Net Increase
Organization 1*	\$621,000	\$1,200,000	\$ 579,000
Organization 2*	\$1,600,000	\$3,600,000	\$ 2,000,000
Organization 3*	\$5,100,000	\$5,700,000	\$ 600,000
Organization 4*	\$1,800,000	\$2,300,000	\$ 500,000
Organization 5*	\$1,600,000	\$2,900,000	\$ 1,300,000
Organization 6*	\$4,800,000	\$6,300,000	\$ 1,500,000
Organization 7	\$1,500,000	\$1,400,000	\$ (100,000)
Organization 8	\$67,000	\$64,000	\$ (3,000)
Organization 9**	\$4,800,000	\$6,400,000	\$ 1,600,000
Organization 10**	\$661,000	\$894,000	\$ 233,000
Organization 11*	\$765,000	\$1,100,000	\$ 335,000
Organization 12*	\$360,000	\$474,000	\$ 114,000
Organization 13*	\$677,000	\$1,400,000	\$ 723,000
Organization 14*	\$3,600,000	\$3,900,000	\$ 300,000
Organization 15*	\$405,000	\$1,200,000	\$ 795,000
Black Led Orgs*		Total net increase	\$ 10,476,000
POC-led orgs **		Total increase to Black-led orgs	\$ 8,979,000
		Total increase to all POC-led orgs	\$ 10,373,000
		Avg increase of Black-led orgs	\$ 748,250

100% increase in every black-led and other POC-led organization budget.

Changes in Black leadership over time
One org became Black-led and one org lost its Black ED but remained POC-led

COMMUNICATIONS AND FRAMING OF A BLACK EQUITY AGENDA

Telling the organization's story in more impactful ways and empowering organizations to embrace, describe, and pursue a vision for Black equity more boldly.

ORGANIZATIONAL DEVELOPMENT

Inspiring organizations to become the best versions of themselves through reflection and response, staff development, partnerships and community engagement.

PRIMARY METHODS

Fund local. Support organizations with a clear and well-documented history of using a combination of grassroots community organizing and leadership development, policy, advocacy, research and/or coalition building to drive change.

FACILITATED CONVENINGS

Design a curated space for organizations to: engage in peer learning and exchange best practices, which eventually evolved into a sacred space for Black and Black-solidarity leaders to develop personal and institutional trust; grapple with the challenges of leadership and organizational sustainability; and develop partnerships that would last beyond the life of the initiative. SGS facilitated nine in-person convenings, including one joint-funder convening in 2019, plus five virtual convenings and one culminating convening in August 2021.

Coupling Funding with Facilitated Convenings

Did the convening format paired with funding help organizations move the needle on their work?

Because the Initiative combined both grant funding to the organizations and facilitated convenings, we wanted to further understand whether, and how, coupling grant dollars with convenings moved the needle on Black equity in a way that grant-funding or convenings ALONE could not do, or not do as well.

Key Findings

Half of the BEI organizations (50%) stated that the convenings were pivotal to advancing movement building, communications/framing, and their organizational development efforts. In addition, 36% stated the convenings impacted other areas of their work, including for example, increasing a sense of unity among leaders, providing space to release the heaviness of the work and to experience Black joy.

Additional findings are outlined in the following pages.

Community and Systems Level

Movement Building, Communications/ Agenda Framing and Systems Changes

LEARNING QUESTION #1:

How did The JIB Fund investment allow organizations to challenge systemic racism?



EDUCATION

Centinela Youth Services and Congregations Organized for Prophetic Engagement (COPE)

work to reform school

discipline policy changes has decriminalized youth in Los Angeles and San Bernardino County schools. Over 2,400 youth were diverted from imminent arrest/prosecution and there was a 95% drop in youth arrests in Compton Unified School District from over 200 students per year four years prior to just 11 arrests in the 2019-20 school year. Similarly there was an 83% reduction in citations and 90% drop in arrests as a result of policy change in San Bernardino City USD and 71% reduction in Fontana USD.

¹ In 2018, East Bay Community Foundation launched ASCEND BLO, a multi-year capacity-building initiative dedicated to Black-led organizations in Oakland; and in Los Angeles, the African American Infant and Maternal Mortality Prevention Initiative launched as a partnership between LA County Department of Public Health, Health Services, First 5 LA, philanthropy and Black-led organizations. In 2020, following a national reckoning on race, several private, public and philanthropic organizations emerged to support and uplift Black-led organizations building power to confront systemic racism.

Organizational Level

Partnerships and Organizational Development

LEARNING QUESTION #2:

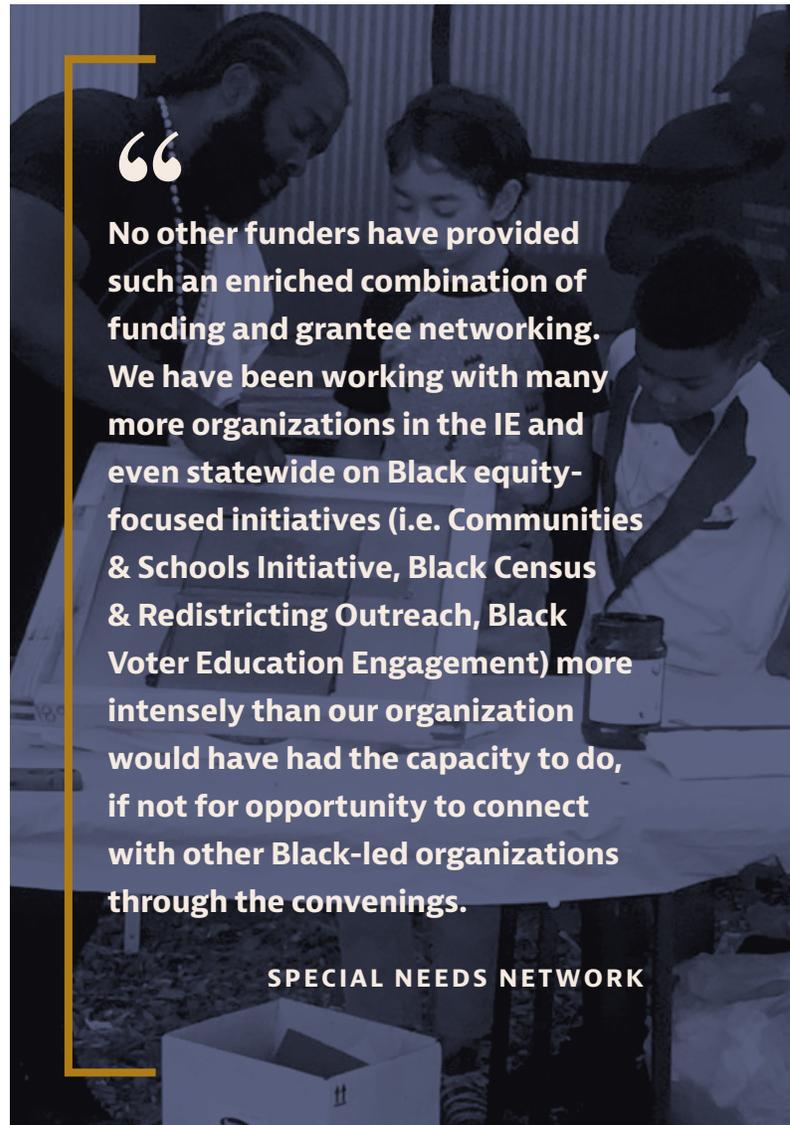
How did The JIB Fund investment impact organizational development and partnerships?

KEY FINDINGS:

- 79% of organizations said the multi-year investments helped advance their work to address institutional racism and systems change; 71% said it supported organizational development; 43% reported multi-year funding positively impacted their movement building efforts and 36% said multi-year funding enhanced their communications and message framing capacity.
- **The annual operating budget of Black-led organizations in the initiative increased by an average of \$748,250 from the time the first grant was issued in 2017 to when the final two-year grant was awarded in 2019.**
 - Several organizations formalized partnerships over the course of the initiative.
 - ARC, Brotherhood Crusade, Centinela Youth Services and Black Women for Wellness wrote each other into various grant applications.
 - From a casual conversation over lunch at one of the convenings, COPE, BLU Educational Foundation and LABWC commissioned a report on Black workers in the Inland Empire and have since formalized a partnership whereby LABWC is expanding its footprint into the Inland Empire working with COPE and BLU as fiscal and programmatic partners.
 - ARC's youth organizers are providing organizing strategy and support to COPE's youth organizers on the San Bernardino County Department of Juvenile Justice realignment plan.
- ARC shared how the convenings allowed them to examine their own internal pipelines for Black leaders to emerge. Convening conversations prompted internal conversations that led to the organization having two back to back Black executive directors, appointing a Black woman as Chair of the board, intentionally recruiting other Black board members and increasing their Black membership base.

Organizations reported that JIB's multi-year investment in BEI helped them to:

- Adequately cover staff salaries long-term and/or expand the staff.
- Maintain continuity on policy campaigns and advocacy to achieve a systemic change.
- Create new programs or build out existing programs.
- Build internal communications and storytelling to better convey their work.
- Be responsive and flexible to the changing landscape, particularly during the pandemic.
- No longer require fiscal sponsorship and to become an independent 501c3 organization.
- Address internal infrastructure with technological upgrades to digitize organizing.
- Leverage other funding opportunities.



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No other funders have provided such an enriched combination of funding and grantee networking. We have been working with many more organizations in the IE and even statewide on Black equity-focused initiatives (i.e. Communities & Schools Initiative, Black Census & Redistricting Outreach, Black Voter Education Engagement) more intensely than our organization would have had the capacity to do, if not for opportunity to connect with other Black-led organizations through the convenings.

SPECIAL NEEDS NETWORK

Individual Level

Leadership Development

LEARNING QUESTION #3:
How did JIB Fund’s investment impact individual leadership development?

KEY FINDINGS

Several organizations shared anecdotally how the convening space contributed to the leadership development of their own staff, strengthening their critical analysis and growing their confidence as leaders. Community Coalition’s Executive Vice President, Aurea Montes-Rodriguez, shared how Black staff who attended the convenings found greater voice within the organization, took on more visible leadership roles and more confidently advocated for the needs of Black staff. Others echoed her thoughts and also added examples of how they were able to interrogate their own leadership styles and sense of self as Black professionals.

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JIB/BEI brought together organizations and leaders working across silos in settings that encouraged sharing, getting to know the work, personalities and struggles of each organization and geographic region of the cohort. Our work is linked however our challenge included learning how to link the work, stifle the unhealthy competition, work through the personalities and share the lessons.

Black Women for Wellness

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The creation of a truly safe space to discuss this sensitive and challenging work with deeply personal impacts was essential for our Black staff. We found that to be healing and fortifying in a way that we had not frequently experienced in our careers, if ever.

Centinela Youth Services



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One adjustment we made was to include self-care as a deliberate component of our leadership development. We know this work is hard, it’s tedious, often thankless and sometimes hurtful in reference to racist comments and experiences that our leaders have to endure to affect change. Modeling the experience of participating in BEI and following the recommendation of one of our parent leaders, we incorporated self-care into our regional convening and it remains a part of all of our leadership programs.”

BLU Educational Foundation

COVID-19 AND OTHER ADJUSTMENTS

64% of organizations stated that COVID was the primary cause of shifts to their work. Those shifts were mostly felt in outreach strategies that resulted in creating new community support programs such as rapid response and mutual aid programs and/or shifting work modalities to virtual spaces and online platforms. In addition, both systems change and organizational development efforts were also causes for adjustments in their work caused by the need to nimbly respond to changes in the landscape, including a rapidly evolving political climate, shifts in narratives around policing and leadership transitions within the organization.

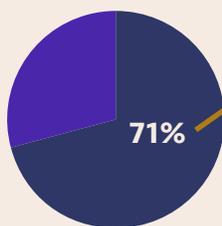
Lessons for Philanthropy for Advancing Black Equity

LEARNING QUESTION #4: What can philanthropy learn from the BEI?

As a growing number of funders look to interrogate their organizational and grantmaking practices to more effectively confront systemic and anti-Black racism, the Black Equity Initiative offers key lessons for philanthropy to consider. These lessons, drawn from anecdotal feedback from the BEI organizational leaders as well as their formal mid-year and final reports, provide early signals to the field about how to approach advancing Black liberation for the long-term.

BOLDLY CENTER THE BLACK EXPERIENCE

Early in the landscape analysis process that informed and influenced the development of the initiative, The JIB Fund made an intentional choice to focus the discovery on root causes of systemic inequity affecting Black populations. While a broader “people of color” framework could have been applied, The JIB Fund chose to maintain a focus on the unique history of Black Americans as targets of racially-motivated oppression. That decision was both bold and necessary at a time, in 2017, when JIB was the only local funder



reported that JIB’s intention to uplift issues impacting Black people helped advance their organizational work to address institutional racism and systems change

Centering the Black experience also helped to advance organizational development efforts (64%), movement building work (57%) and communications and messaging capacity (50%).



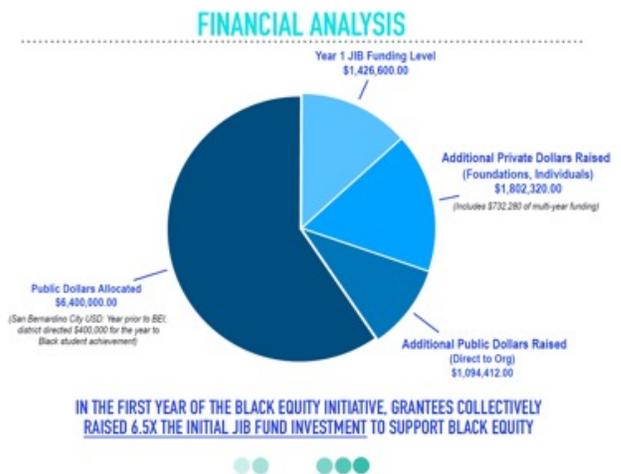
“ Since 2018, we have increased Black representation and leadership on staff, and specifically have increased the share of Black Organizing Team staff from 30% to 60%. BEI provided a space for us to strategize with other Black-led organizations about best hiring and retention practices.

SCOPE

to maintain a sustained emphasis on Black populations. In 2020, when America faced the largest global reckoning on systemic anti-Black racism in more than a generation, The JIB Fund had the foresight to pioneer this focus four years prior.

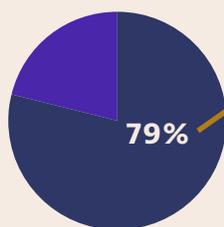
INVEST OVER TIME

While not new to philanthropy, The JIB Fund was new to systems-change work. Traditionally, their grantmaking focused on programs and services under a more broadly defined frame of fostering a sense of belonging among isolated and marginalized groups. Further, prior to the Black Equity Initiative, The JIB Fund issued one-year, one-time grants designed as catalyst grants.



BEI represented a learning edge for The JIB Fund and as such, they approached the initiative with the intention of ongoing discovery. They did not set out to fund BEI for a certain number of years. Rather, early on, they agreed to allow the work to unfold and make decisions

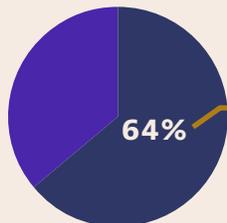
about future funding based on what they were learning from the field. The JIB Fund went on to seed the initiative for four years and in the second year, funded a place-based pilot to expand the work of BOLD (Black Organizing for Leadership and Dignity) in Los Angeles. JIB's multi-year investment in BEI provided financial sustainability to the organizations that led to greater resource leveraging. In the first year alone, the grantee organizations raised more than 6.5 times the initial JIB investment of \$1,426,600. In total, The JIB Fund invested more than \$5.7M in direct grantmaking, convening and consultant services over four years-



reported that having multi-year investments helped advance their work to address institutional racism and systems change

Multi-year investments also benefited cbo's in the areas of organizational development, movement building, and communications and framing.

Although it's often ideal to provide multi-year funding, the JIB Fund and the BEI grantees launched this initiative, entering into new territory of learning and exploring together.



reported that they were able to evolve/scale organizational development efforts due to the size of the award amount

MATCH INVESTMENTS TO THE SIGNIFICANCE OF THE CAUSE

Grant awards ranged from \$46,600 to \$70,000 for planning grants and between \$75,000 and \$150,000 for next level grants.



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While our organization has worked on and led campaigns to protect and advance the civil rights of our (Skid Row) community residents in the past, very rarely if ever have we received funds on the scale of the Black Equity Initiative to specifically focus on issues impacting Black communities which facilitated the level of collaboration prompted by this initiative.

LISTEN, LEARN AND LET LEADERS LEAD

As previously mentioned, The JIB Fund approached the Black Equity Initiative with listening and learning in mind. Indeed, their first act was to host a listening session with community experts to inform their thinking. They listened again when their philanthropic advisory firm, JMC Philanthropic Advisors, urged them to consider hiring a Black consultant with local community ties to lead the work; and then again when designing the initiative to reflect the findings SGS reported in the initial landscape analysis. Similarly, JMC continued to be learning, forward looking, and responsive to the needs of the initiative.

ACTIVE LISTENING was an essential element of the work. This did not mean The JIB Fund did not have their own thoughts or ideas, but it did mean they were willing to embrace guidance from others and accept, as authoritative voices, input from those whose professional and lived experience outweighed their own.

ACTIVE LEARNING was another important ethos held by The JIB Fund. The intention of learning was more than the acquisition of knowledge: it was to inform action. All of the adjustments made over the course of the initiative were informed by community

intelligence. From adding more organizations under the workforce development issue focus to piloting an investment in BOLD to hosting a funder convening in March 2019 to encourage more philanthropic investment in Black organizations, The JIB Fund practiced responsive philanthropy throughout the initiative.

From the onset, The JIB Fund did not prescribe outcomes for the work. Rather, organizations were asked to define their own grant outcomes and measures of accountability by simply asking: what do you want to accomplish and how will you define and monitor success? This approach gave organizational leaders room to imagine and lean into their own sense of responsibility to their communities.

Trust-based philanthropy is mostly getting out of the way and allowing the work to breathe without funder suffocation. It's asking leaders to show funders how to be better partners and giving space for work and wellness to coexist. In 2018, following a grueling midterm election and campaign season where most of the BEI organizations were involved in civic engagement and voter education work, the SGS team spoke to a few leaders in September of that year about how they wanted to focus the grantee convening scheduled three days after the election. From those few conversations, it was clear that what they really needed was a break. The JIB Fund allowed SGS to plan the convening as an outdoor cooking class and community-building experience for BEI executive directors and senior leaders. Almost three years later, some still talk about the memories from that day. One attendee even planned his family's holiday get-together that year at the same place.

LETTING LEADERS LEAD means becoming active listeners and active learners. As other funders look to the Black Equity Initiative as a model to learn from, the organizations offer some helpful suggestions:

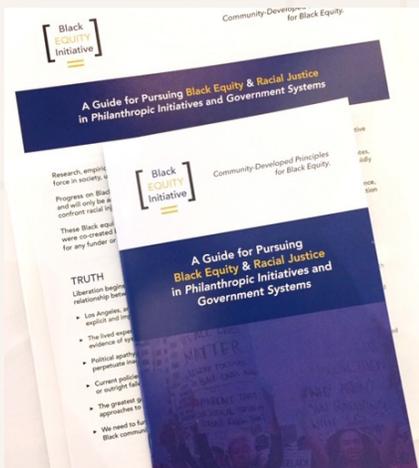
- The work is intense. Funders should incorporate wellness, informal networking and/or provide support for personal professional development.
- Add a wellness line-item to the project budget template and the RFP questions.



- Fund Black-led organizing and communicate your intention to invest long-term so organizations can plan and think big.
- Do not set the agenda for Black-led organizations; make sure initiatives aren't prescriptive but rather let the needs be defined by the organizations themselves.
- "Capacity building" is often a way to mask "resource infusion" ~ leaders know what skills and capacities they need but need the funding to hire and retain good staff.
- Ensure Black-led organizations are part of cross organizational/cross issue work and speak up and out when Black-led organizations are not in the room, or when organizations claiming to service Black populations do not have Black staff in leadership positions.
- Bring on Foundation staff and consultants who reflect the communities you wish to fund and learn from.
- Be intentional with relationship building and grow with organizations over time; stick with them through their growth and learning periods (organizations need the space to learn, adjust and fail without punishment). Get to know organizational leaders on a personal level.
- Trust Black-led organizations, fund them and use trust based philanthropy practices.
- Use your networks to expose other funders to Black-led organizations and help broker relationships.
- Streamline reporting requirements; make less frequent and cumbersome so organizations can focus on doing the work.
- Feature and celebrate organizational successes and partnerships.

As the Initiative transitions to the Black Equity Collective, these lessons continue to guide the work ahead.

Impact Stories and Anecdotes



In 2019, the organizations released the [Principles for Black Equity: A Guide for Pursuing Black Equity and Racial Justice in Philanthropic Initiatives and Government Systems](#). The Principles were developed over the course of 18-months during the cohort convenings. Since their release, the Principles have been used to guide other's work, including: Liberty Hill Foundation, which uses them as teaching tools for their DAF holders and giving circles to guide and inform their funding choices; as a grounding document around which the University of Southern California organized its application and approach to its early implementation phase of the LAHSA Black People Experiencing Homelessness report; by staff of the Arts Education Collective to advocate for funding and program design using the Principles as a strategic guide; and as founding governance and partnership engagement documents for both the Black Equity Collective and BEI-IE Fund.



In April 2020, following early reports of the disproportionate impact COVID was having on Black communities, the Black Equity Initiative organizations, along with Black-led organizations of the African American Infant and Maternal Mortality Prevention Initiative (AAIMM) co-signed an Open Letter to Philanthropy detailing how Black-led organizations are both anchor organizations and community first responders that deserve resourcing to meet the needs of a community often harmed by government neglect and systemic racism. The letter was sent to over 200 funders and more than 50 public leaders. The letter was included in its entirety in the [LA County Department of Public Health COVID-19 report](#). Further, in June 2021, the Chair of the Irvine Foundation shared how the letter was a catalyst in accelerating the Foundation's equity focus.



Centinela Youth Services and Collective REMAKE (both white-led organizations) began the Initiative as projects of other nonprofit organizations. Both have since become their own independent 501c3 organizations, thanks in large part to their executive directors wanting to more freely and flexibly integrate and communicate a commitment to Black equity across their programs, services and advocacy endeavors.



The funder convening in March 2019 was where the initial seed for the **Black Equity Collective** was planted. Two years later, the Collective launched with a 10-year vision formed by the BEI organizations. As of the writing of this report, the Collective is supported by 16 funders (including The JIB Fund) and has raised more than \$4M in less than six months.

When responding to the question: “What did The JIB Fund get right with BEI?”, over half of the organizations highlighted the importance of having hired the right consultant to guide the work.

“

JIB created truly safe spaces to empower us and support us in exploring deep questions together. Having strong consultant leadership with ties to the Black community in Los Angeles was important and helped build a space grounded in trust and genuine knowledge of our communities. JIB was also largely hands-off and a trust-based funder that allowed for the community’s need to drive the agenda.

Hiring Kaci (Patterson) was instrumental. Her role in facilitating the convenings helped the group to shape a set of principles to guide our collective work and was key to keeping everyone at the table and moving forward...together. Each session was thoughtfully planned with us which further unified us and deepened our collective resolve to build a vision for Black liberation through the movement for Black equity. ”

So, What Next?

The BEI's theory of change was centered in the belief that progress on Black equity and racial justice must be part of any forward movement in the United States, and will only be achieved when philanthropic investments, public policies, and institutional practices boldly confront racial injustice. Having concluded in June 2021, its replacement—The Black Equity Collective—is building upon the BEI's unwavering foundation of racial justice for Black people.

In response to needs expressed by the BEI organizations over the life of the Initiative, the Collective will focus on the work of Black equity through the lens of institution-building (rather than programs, prescribed issues or campaign-specific work). Launched in January 2021, the Collective will lead a 10-year effort to invest \$60 million dollars (\$6M per year) in growing a regional, networked infrastructure of Black-led social justice and movement-building institutions.

Currently, there is no philanthropic network in California solely dedicated to Black issues, to empowering Black voice and investing in Black leadership and Black organizations. The Collective fills this need by focusing first on the three-county region of Los Angeles, San Bernardino and Riverside counties to build an interconnected ecosystem of Black-led and Black-empowering organizations across issue areas while joining philanthropy and public agencies in strategic relationship with these groups to pursue equity and justice for Black people.

The impact of the Black Equity Initiative lives on in the Collective and in other efforts around the state, including the CA Black Freedom Fund housed at the Silicon Valley Community Foundation, the African American Infant and Maternal Mortality Prevention Initiative's Village Fund and the BEI-IE Fund housed at the Inland Empire Community Foundation under the visionary leadership of its co-chairs, COPE and BLU Educational Foundation.





Thank you to all of the Black Equity Initiative organizations:

A New Way of Life Re-Entry Project
Anti-Recidivism Coalition (ARC)
Black Women for Wellness
BLU Educational Foundation
Brotherhood Crusade
Centinela Youth Services
Collective REMAKE
Community Coalition
Congregations Organized for Prophetic Engagement (COPE)
LA Black Worker Center
LA Community Action Network
LeadersUp
Special Needs Network
Strategic Concepts in Organizing and Education Policy (SCOPE)
Youth Action Project
Advancement Project CA (a technical assistance provider)

