SHIFTING
SYSTEMS
INITIATIVE

Solutions for Scaling Impact

SHIFTING POWER TO SHIFT SYSTEMS:

INSIGHTS AND TOOLS FOR FUNDERS

POWER AND EQUITY WORKSHOP SERIES SUMMARY REPORT

ROCKEFELLER PHILANTHROPY ADVISORS
SHIFTING SYSTEMS INITIATIVE

About this Report

This publication is part of the Shifting Systems Initiative launched in 2016 by a number of philanthropic organizations and Rockefeller Philanthropy Advisors, supported by a Steering Group that over time has included the Skoll Foundation, Ford Foundation, Porticus, Chandler Foundation, Draper Richards Kaplan Foundation, and Jasmine Social Investments. The initiative's aim is to encourage funders to place longer-term, more adaptive resources with their grantee partners to scale their solutions and impact, and enable sustained, positive systems change by shifting the conditions that hold problems in place. Its mission has remained consistent over its lifetime: to examine when, how, and why certain solutions achieve system-level shifts, and to share the lessons and recommendations from those successes.

Visit https://www.rockpa.org/project/shifting-systems/ for more information about this initiative and to read the full range of publications.

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Executive Summary

Over the course of three months in early 2022, Rockefeller Philanthropy Advisors' Shifting Systems Initiative hosted an eight-part Power and Equity Workshop Series. Attended by an invited group of funders and other partners committed to incorporating systems change practices in their work, these discussions centered around the idea that shifting existing inequitable power dynamics is fundamental to effectively shifting systems and addressing increasingly complex global challenges. These honest and rich conversations surfaced a number of important themes, topics and insights that are summarized below.

Acknowledge

Funders would benefit from candidly acknowledging the inequitable origins and nature of the institution of philanthropy, and engaging in deep listening with grantees, communities and partners—particularly people of the 'global majority'—in a way that is authentic. This input should be used to develop vision and practices to shift internal practices, including decision-making, monitoring and evaluation, grantmaking and investments.

Share

It is important to create and make broadly accessible bodies of knowledge, along with platforms for sharing tools, frameworks and lessons learned, and best practices to cultivate ecosystems, as well as enable more equitable power dynamics as a catalyst to transformative change. It is essential for funders committed to enabling systems change to convene and participate in global communities of practices and learning cohorts that both include the full range of voices and drive practical steps.

Listen

Funders should engage in deep and authentic listening with grantees and look to communities served for solutions. It is essential to incorporate input from grantees and communities in future planning, including impact assessment, in order to create

meaningful impact from the ground up. This also involves building teams that represent proximity to issues and communities, as well as commitment to practices that advance equity and shift power.

Embed

Systems actors interested in and committing to shifting inequitable power dynamics should embrace and embed new and more flexible practices. These include streamlining and including culturally responsive and equitable reporting processes and building mutually accountable relationships.

Making the conscious decision to shift power to grantees and communities is the next challenge. Based on insights and knowledge shared during the series, funders intentional about this next step in pursuit of equity can use the following points for reflection and action as their guideposts:

Shift Internal Vision and Practices to embrace a vision of society based on global solidarity and distributed leadership. Uplift and value the voices of people and organizations that have been historically marginalized, and under-resourced by the philanthropic sector.

Foster a Culture of Learning, Growing and Experimenting through exploring new tools and resources, fresh and emergent perspectives and funding grantees without restrictions. Invest in the ecosystem and collaboration to spur new ideas, accountability and collective action on power and equity.

Embrace and Embed Equitable Evaluation and Impact Assessment Practices by recruiting evaluation teams and consultants who are culturally competent and possess lived experience, and by working with grantees to create relevant metrics of success that define impact on their terms.

Introduction

Money and influence are power. A product of historically inequitable and exploitative economic and political systems, philanthropy continues to wield disproportionate power today. At times this unintentionally contributes to inequitable power dynamics vis-a-vis the very communities whose lives funders seeks to transform. They often reinforce the systems philanthropy seeks to shift. In the past decade, however, the concept of power has been extended to recognize its capacity for liberation.[1] Recently, a more nuanced conception of shared power has emerged that grows out of collaboration and relationships and fosters collective action. This framing is grounded in mutual respect, reciprocal support, and shared decision making.[2] In part, these shifting norms and definitions have spurred an increasing number of funders and ecosystem partners to become more open about the inequities of and within philanthropy. This has contributed to a growing recognition that shifting systems to tackle complex and interconnected challenges requires addressing and rebalancing inequities of power.

Thus, more and more philanthropies seeking wide-ranging systems change are embarking on a journey of meaningful introspection and discussions with experts, equity practitioners, and the broader ecosystem of partners to examine their own power dynamics and develop actionable steps to rebalance, share and ultimately shift power. As discussion around the topic grows, a rich body of tools, approaches, lessons learned, and best practices continues to emerge, enabling funders across the globe to adopt more equitable practices. Some major themes and trends include participatory and flexible giving, centering communities served, streamlining reporting requirements, and equitable evaluation practices.

Rockefeller Philanthropy Advisors (RPA), along with its philanthropic partners in the Shifting Systems Initiative and experts across the globe, have explored these and related questions as part of our dedication to convening thoughtful and honest discussions amongst those committed to furthering systems change by changing their own behaviors and

practices. In 2022, RPA hosted an eight-part Power & Equity Workshop Series that invited funders to "roll up their sleeves" and examine existing strategies, practices and culture through a power and equity lens, as well as to develop a roadmap for how they can go about making practical improvements in their institutions. From April to June, sessions in the series featured different leading experts on the topics of power and equity, and elevated a different aspect of equitable practices, including through the lens of climate, environment and other thematic areas. Expert speakers included:

- Kumi Naidoo, Africans Rising and Honorary Fellow, Magdalen College Oxford
- Mark Cabaj, From Here to There and Tamarack Institute
- Pia Infante, Senior Fellow at the Trust Based Philanthropy Project
- Stefanie Kimou, Founder and Lead Consultant, PopWorks Africa
- Meg Hargreaves, Senior Fellow, NORC at the University of Chicago
- Tracy Hilliard, Director, Center for Culturally Responsive Engagement at MPHI
- Chandria Jones, Senior Research Scientist, NORC at the University of Chicago
- Marion Gee, Co-Executive Director, Climate Justice Alliance
- Mateo Nube, Co-Founder, Movement Generation Justice & Ecology Project
- Masego Madzwamuse, Director, Environment Program, Oak Foundation

The audience, comprised of funders and partners dedicated to accelerating systems change and equity, contributed helpful insight and important discussion around the topic.

This report is a collection of the themes, topics, conceptual frameworks and actionable resources that can enable funders to create equitable processes and practices, and to embed equity as a core principle and building block of systems change. We hope this publication will be a meaningful contribution towards moving the practice of philanthropy away from its inequitable origins and practices, and towards more equitable practices that will ultimately enable it to shift power and systems.

Addressing the Complexity of Systems Change Work Through an Equity Lens

In the course of the workshop series, speakers established a conceptual baseline underscoring the interconnectedness between addressing complex and interwoven systems challenges and equity. In fact, equity was confirmed as an essential and indivisible element of effective systems efforts. The equitable evaluation session, for example, introduced The Groundwater Approach as a means for understanding why it is vital that decision-makers look beyond a specific event towards the underlying social conditions that created those dynamics in the first place. This approach posits that if you saw a fish belly up in a lake, you might ask yourself what was wrong with that fish? However, if you saw many fish belly up, you would likely note that the issue is not with the fish—it is with the lake. The issue is not only in the individual, but also in the system that enables those dynamics. This metaphor is intended to shed light on how broken systems manifest themselves as inequities in today's world. In this example, and in many challenges we face today, addressing the system—or the lake—is likely to be more complicated than attempting to help an individual fish, but will create greater positive impact.

This section aims to break down the complexity in systems challenges and why navigating through the lens of equity is critical to transformational change.

THE MAKEUP OF A SYSTEM

Series speaker Mark Cabaj of From Here to There noted that "Impacting a complex challenge requires cumulative, mutually reinforcing change at multiple levels, including niche innovation, systems, culture, and landscape." In essence, linear or traditional responses that focus on one component of a problem will only solve symptoms of the underlying issue. Cabaj defined an integrated approach as one that goes beyond the linear

and combines these levels as adaptive change.

As series speaker Kumi Naidoo, a renowned human rights and environmental activist, pointed out, unfortunately most programs tend not to focus on macro change, let alone change happening simultaneously at many levels. According to Naidoo, "most civil society interventions focus on microprograms, perhaps 15% focus on meso-level politics, and 5% focus on macro-governance." He further explained that this is because the macro-governance issues typically take much longer than micro-programs and there may not be any success for decades because of how complex the issues are.

To better understand this complexity, two existing frameworks are worth reviewing. The Iceberg Model has been used in RPA's Shifting Systems

Six Conditions of Systems Change

Policies | Practices | Resource Flows

Structural Change *(explicit)*

Relationships & Connections | Power Dynamics

Relational Change *(semi-explicit)*

Mental Models

Transformative Change *(implicit)*

ICEBERG MODEL EXERCISE

In designing for systems change, groups can use discrete events to illuminate the deeper layers in societies that maintain the status quo. Identifying causes and effects at deeper levels often leads to funding different types of interventions.

Events: A real event that took place.

Patterns: The changes and the trends that we perceive taking place over time that will have caused this event.

Structures: Rules, social and organizational norms, policies, guidelines, power dynamics... structures support, create and influence the patterns we see that lead events we are discussing.

Mental Models: Ultimately drive behavior and keep the structures doing what they do. These are assumptions, beliefs, values, morals, expectations, values, thoughts and processes of reasoning that need to exist to cause the structures to be the way they are.

Initiative, and Six Conditions of Systems Change is another offered by Cabaj during the workshop. While they appear to be inverse of one another and use slightly different vocabulary, both aim to break down the different elements or conditions that inform and shape a system. In both cases, mental models are at the base of all systems. RPA's Shifting Systems Initiative defines mental models as models that ultimately drive behavior and keep the structures doing what they do. These are

assumptions, beliefs, values, morals, expectations, values, thoughts and processes of reasoning that need to exist to cause structures to be the way they are. Cabaj's framework highlights that mental models are the key to transformational change.

WHY A PARTICIPATORY AND EQUITABLE LENS MATTERS

Power dynamics, relationships, and connections that are informed by mental models and underlying social norms are a key component of a system. Thus, systems are more effectively changed with participation from community members who live and understand these relationships and dynamics. Naidoo stated, "any systemic change to push for cannot work if there is not a constituency that is pushing for it as well. It cannot be rooted in policy alone or authentic change will not happen." Similarly, series speaker Masego Madzwamuse, Director of the Environment Program at the Oak Foundation, shared the illustration bellow to show
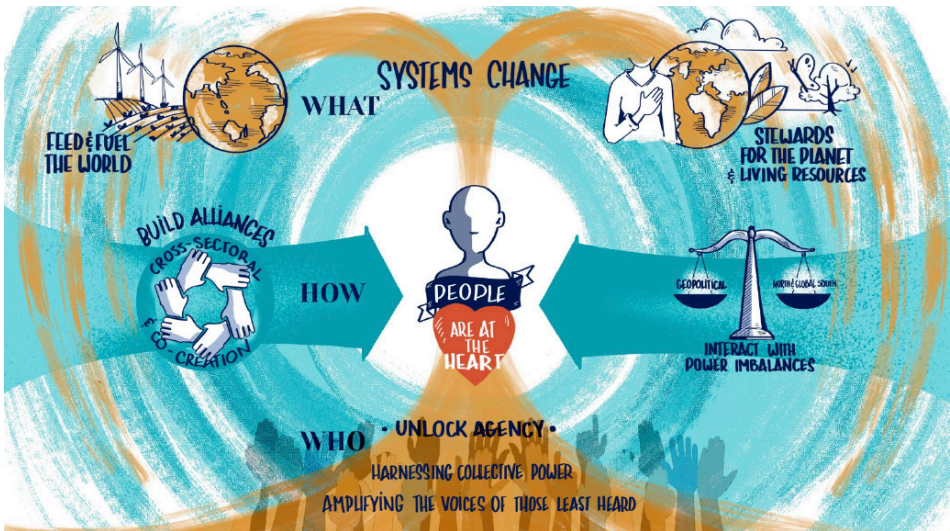
how approaches at Oak are increasingly centered in people and the communities served. She noted that, "no systemic change is durable unless we include people in the process of that change. Durable and meaningful change and meaningful impact cannot happen without people tapping into their power and agency."

Essentially, problems cannot be solved in an "adaptive" or multi-level way without community input. A participant further described the adaptive approach as "a zooming in and zooming out approach to conceptualize how systems change approaches and community-based programming work together."

MAPPING POWER DYNAMICS

Mapping systems is a helpful tool to see how systems function, where opportunities for intervention exist, and what kinds of unintended consequences may arise. They also illustrate the complexity of systems and why long-term work is necessary to create lasting change.

Mapping these societal layers can shine a light on the linkages between embedded mental models and how they manifest themselves in real events. In the same way, mapping out systems of power can test the levels at which a project is operating and if it "zooms in and zooms out" to create an adaptive approach.

As a tool for mapping the level at which a project is operating, consider examining who holds power in decision-making processes. This map, presented by series speakers Chandria Jones, Tracy Hilliard, and Meg Hargreaves examines the factors that inform the final decision makers' choices. It invites participants to ask themselves who holds the power, who was engaged and empowered, and who was missing from the
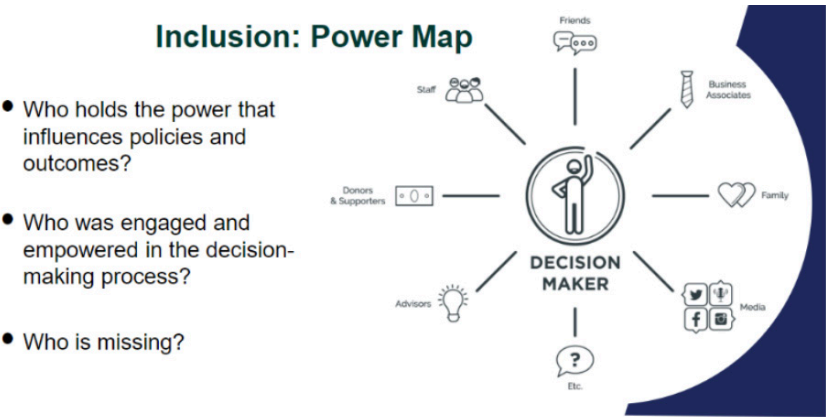
Environmental Justice as a Nodal Systemic Issue

Series speakers Marion Gee and Mateo Nube who work on climate justice relayed how participatory approaches and community input are not just a part of the project; these concepts are the thread that weaves the fabric of the project together.

Mateo stated, "when you study life on earth, you realize that we cannot live in the absence of relationships. Without relating, we actually can't survive." This grounding principle of relationships as vital is central to how Gee and Nube characterize climate justice, including that it:

1. Is inspired and organized by communities on the frontlines of climate change

2. Challenges the extractive economy that is harming people and ecosystems

3. Builds resilient, regenerative and equitable economies rooted in place-based webs of social and ecological relationships

4. Exposes false promises posed as 'solutions' to the climate crisis, so that precious resources are not allocated to programs that exacerbate social or economic inequality or cause further ecological disruption

The power of people in this project and in the concept of climate justice as a whole are evident in this list.

In the same vein, Madzwamuse noted that "learning how communities frame the issues and priorities are key to investing in ways that will build cross movement solidarity and lead to meaningful change on the ground." In essence, dismantling the systems that create climate change and its inequitable root practices—including white supremacy, patriarchy, and colonization—can only be achieved through radical and authentic listening, and empowerment of frontline communities that are affected most.

These conceptual frameworks demonstrate the central place the questions and topics of power and equity hold in systems work towards transformative change. They serve as a robust bridge to actionable roadmaps and instruments and contextualize the complexity of this work.

Demystifying and Centering Equitable Practices

In 2017, the Shifting Systems Initiative (then named the Scaling Solutions Towards Shifting Systems Initiative) released its [first report](#), featuring five concrete recommendations on how to accelerate scalable solutions to the world's most pressing problems: streamline, collaborate, accelerate, learn, and empower (SCALE).

From the genesis of the initiative's research, extensive interviews made it clear that genuine trust is a core principle of each of these recommendations, especially empowerment. The report stated, "the relationships that were not hindered by an imbalance of power were those based on mutual respect, not compliance. In those cases, despite holding the purse strings, funders seemed to recognize and appreciate that grantees are the ones out in the field, closest to the work, and valued their opinions and ideas. In addition, funders approached those relationships from a place of trust, giving grantees space to make decisions, make mistakes, and determine solutions. In such instances, grantees have the freedom to focus on the work of scaling."

In the years since that first report, trust and trust-based philanthropy have emerged as top philanthropic buzz words in articles, panels, and other convenings around the world. While the repeated theme of trust is a testament to its importance, many philanthropies that have built complex methods of assessment into their strategy still do not fully internalize the concept and go beyond the rhetoric.

Empower:
Consciously shift power dynamics with grantees

Accelerate:
Hold active and honest discussions with grantees about strategic non-monetary support

Learn:
Develop more knowledge on shifting systems, and when and how to support grantees in that effort

Collaborate:
Share intel with other funders

Streamline:
Redesign grantmaking processes

MYTH-BUSTING TRUST

Series Speaker Pia Infante, former Co-Executive Director of the Whitman Institute and current Senior Fellow with the Trust-Based Philanthropy Project, is no stranger to muddled definitions and misconstruction of these topics. In her session she left no ambiguity in her requirements for trust-based philanthropy, and stated, "it must be clear about to whom the organization is accountable and what the organization values." By centering these core themes, philanthropies will intrinsically open the door to authentic relationships.

To further address the misinterpretations associated with trust-based philanthropy, she worked in partnership with the Trust-Based Philanthropy Project in developing ten most frequently-asked questions that come up in conversations about embracing trust-based philanthropy. The responses below are from a collection of answers based on contributions from many trust-based practitioners.

Trust-based philanthropy sounds like willy-nilly philanthropy. Where's the rigor? A trust-based approach requires quite a bit of rigor. The first building block of rigor is to establish clear concepts of mission, strategy, and profile of community partners to which the foundation is accountable. The next level of rigor is in establishing and being transparent about the criteria and assessing grantee relationships; in how we calibrate our work to accommodate different grantee needs; how we identify, respond to, and approach prospective grantees; how we bring a bigger picture lens to understanding our philanthropic impact on the organizations we support; and how we can and should effectively deploy our resources, networks, and expertise to advance the goals we are supporting. In a trust-based approach, the rigor also lies in our ability to constantly check ourselves on how we as funders are living up to our values as an organization.

How do you measure impact in a trust-based context? Trust-based philanthropy encourages a more expansive understanding of impact — especially considering alternatives to traditional frameworks wherein funders define impact goals they set for grantees. Not only are grantee partners better equipped to define and assess their own success, many

nonprofits work on issues that will not yield any tangible outcomes within the course of 12 months. If impact assessment is a priority for your organization, trust-based philanthropy encourages those measures to be defined by grantee partners, and pushes for conversations about impact from a lens of curiosity and learning. What is realistic for grantee partners to achieve in the short and long term? How well do they think they are reaching their goals? What may be getting in the way of those goals, or what learnings have informed shifts in their work? These types of conversations can open up a wealth of new insights for funders, allowing us to have a more expansive understanding of grantees' needs, as well as a better understanding of what we as funders can do to better support nonprofits in achieving their goals. Another way to consider impact measurement is to turn the lens on your own organization. How well are you meeting your goals as a foundation? How well are you serving your grantee partners? How is a trust-based approach helping them (or not)? How much do your grantee partners trust you? How can you do your work differently or better?

How do you ensure grantees' accountability in a trust-based approach? Trust-based philanthropy encourages us to interrogate traditional notions of accountability. By taking a relational, dialogic approach with grantee partners, it opens up a whole new way of understanding accountability. By being in relationship with grantees, understanding their self-defined measures of success, and engaging in dialogue about how these measures are evolving over time, we inherently create a new dynamic of reciprocity and mutual accountability. Over time, this will allow you to move away from word smithed or sugar-coated reports, toward genuine information that can give you better insights into what your grantee partners are doing and learning — and how they are refining their work and operations to respond to evolving needs and demands. Regarding financial accountability, trust-based funders make time to review publicly available 990s and annual reports as part of "doing the homework".

EQUITABLE EVALUATION

As speakers Tracy Hilliard, Meg Hargreaves, and Chandria Jones underscored, unsurprisingly, one major factor in moving beyond "word-smithed or sugar-coated report" evaluations involves funders looking inward and reassessing themselves in order to create a culturally responsive and equitable evaluation process. A major consideration when assessing decision-making structures and systems is about more than who is included, but also who was empowered and engaged to make decisions, along with who is missing from the table.

The Equitable Systems Change Evaluation Framework below, developed by Meg Hargreaves, Chandria Jones, Brandon Coffee-Borden, and Heather Britt, details an ideal culturally responsive and racial equity-centered process for assessing systemic and structural change. Historically, community voices are often missing from this part of the equation, which is what results in broken evaluation structures. As shown in the cycle displayed, both input from communities and internal decision making are crucial steps in the process. Creating the right evaluation teams, engaging with communities, prioritizing population input in all phases of the evaluation, and measuring change in collective capacity, agency, and power as well as equity, diversity, and inclusion are concrete steps that philanthropies can take to operate through this critical lens.
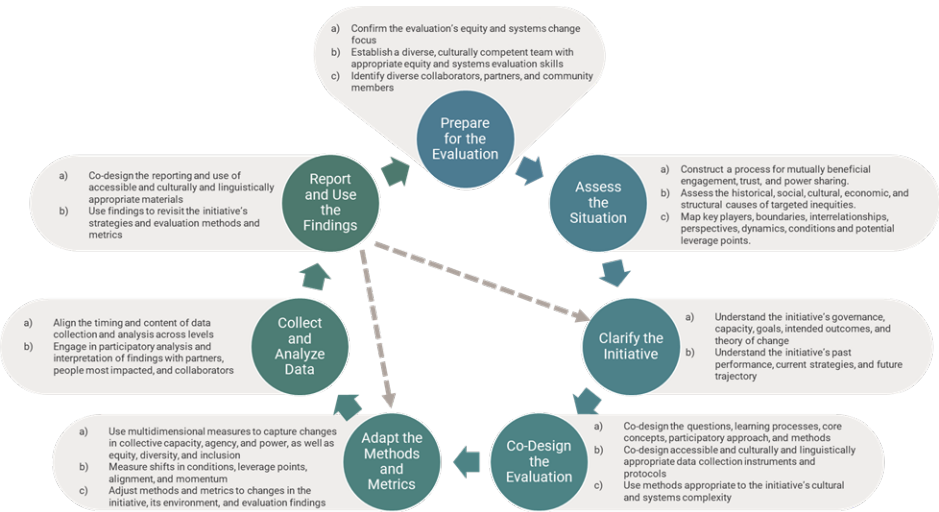
CENTERING SOLIDARITY

To further clarify this theme, Stephanie Kimou, Founder and Lead Consultant of PopWorks Africa, opened her Power and Equity workshop with a Lillia Watson quote that speaks to the spirit of trust-based philanthropy, stating, "If you have come here to help me you are wasting your time, but if you have come because your liberation is bound up with mine, then let us work together." `

In essence, this practice acknowledges that philanthropy doesn't hold ultimate wisdom, authority, and expertise. Everyone has wisdom to solve problems and the importance of providing resources and support to non-traditional problem solvers.

Kimou explained that solidarity-centered grantmaking must meet three major criteria: it must be decolonized, anti-racist and intersectional.
.
Anti-Racist: A conscious decision to make frequent, consistent, equitable choices daily.

These choices require ongoing self-awareness and self-reflection as we move through life. In the absence of making anti-racist choices, we (un)consciously uphold aspects of white supremacy, whitedominant culture, and unequal institutions and society. Being racist or anti-racist is not about who you are; it is about what you do.

Decolonized: The process of deconstructing colonial ideologies of the superiority and privilege of Western thought and approaches.

It involves dismantling structures that perpetuate the status quo and addressing unbalanced power dynamics, valuing, and revitalizing Indigenous knowledge and approaches, and weeding out settler biases or assumptions that have impacted Indigenous ways of being.

Intersectional: The interconnected nature of social categorizations such as race, class, and gender as they apply to a given individual or group. When discussing intersectionality, it is important to be aware that intersectionality is mainly referred to as only being an issue in the minority community and while it manifests there, it is more widespread and exists within all communities.

AN UNEXPECTED EXAMPLE

For funders looking for guiding principles on solidarity-centered grantmaking, Kimou drew from an unexpected source: her experience as a doula. Doulas provide advice, information and support to a pregnant woman before, during, and just after labor, an extremely intense period, and work in which she takes great pride. Pregnant women are in an extremely vulnerable position and need to trust their doula to provide support in the best way for them.

To share more about the relevance of a doula's mindset Kimou introduced the following principles:

- You can only make a positive impact if you follow, not lead.
- You should not make freedom of choice harder for those you serve.
- You should not limit others' experiences with your own definitions and perspectives.
- You should provide as much information as possible to enable autonomous decision making.
- You should be grateful and humble that you're supporting this community.
- Remember: this work will happen with or without you.

These principles, Kimou explained, can apply to an aspirational relationship between funders and grantees. In the same way that a doula should support a woman giving birth and aim to make her as comfortable as possible, funders can empower grantees to make the decisions that create the solutions grantees know are right for their communities.

In bringing the metaphor full circle, a participant from a corporate foundation stated, "We need to redistribute wealth to people who are birthing new systems and changes. Humility and empowering those most impacted in the community who can lead solutions are both necessary."

In a world that moves more quickly by the day, it is essential that funders take the time to truly understand the meaning and message of topics like trust-based philanthropy, and unpack metaphors like the doula and solidarity-centered grantmaking to create common understanding and elucidate actionable steps.

Frameworks and Roadmaps for Success

Systems change work is garnering increasing attention from philanthropy-oriented conferences and workshops such as the Power and Equity series this report is based on, philanthropic organizations, major philanthropy media outlets, and consulting firms that support philanthropists and philanthropic organizations. Therefore, caution is warranted because many, if not most, funders may fail to match words with actions when it comes to systems change. This is difficult and time-consuming work.

Nevertheless, the Shifting System Initiative's report on [Seeing, Facilitating, and Assessing Systems Change](#) explained the "takeaway for funders is clear: Shifting systems to address climate change, mass incarceration, educational inequality, and other pressing issues begins with a systemic shift in the philanthropic sector's own funding models."

OPERATING ARCHETYPES: A TOOL FOR ALIGNMENT AND ACTION

So how can philanthropy walk the talk to shift its own embedded systems and create transformational change? As this report emphasizes, the process begins by looking inward and assessing where the organization stands now, since defining a starting point helps in creating more effective and attainable goals. Based on RPA's research and practice, organizations spanning many different [Operating Archetypes](#) are capable of embedding and pursuing equity and trust. Some funders, however, are especially well positioned to embrace equity because they put those closest to the challenges being addressed at the center of their work. Funders who prioritize cultivating relationships and networks, emphasize flexibility and agility, and maintain more hands-off approaches that allow grantees to envision and drive their own programming are often better equipped to get started on practices related to systems change and trust-based philanthropy. For lasting effectiveness, these organizations should invest in communications as a way of enhancing transparency, trust, and more equitable power dynamics.

Funders and grantees have been increasingly vocal about inequitable power dynamics within philanthropy. Many are championing trust-based, flexible, participatory, and inclusive giving. As they embark on this journey, funders note the following factors:

Financial Resources: As most philanthropies lead with financial resources, they hold power. Embedding equity in an Operating Archetype involves sharing or ceding this power by engaging in flexible, unrestricted giving; easing application and reporting burdens; and including grantees and members of frontline communities in decision-making.

Talent: Most philanthropies consider their staff to be a leading asset. Staff often act as experts, implementers of operating models, and stewards of key resources, frontline work, relationships and knowledge. To center internal and external equity, philanthropies are increasingly hiring people with lived experiences who bring a diversity of perspectives and bridges to communities they are serving. Additionally, staff closest to the field can be empowered to shape programs, and make key decisions.

Governance and Decision-making: Who sits at the decision-making table matters. Philanthropies looking to embed more equitable practices in their archetypes seek alignment with the board on questions of internal and external equity. Crucially, they aim to ensure that the board represents a diversity of perspectives, lived experiences and communities.

Communication: Funders embedding equity incorporate grantee perspectives in a way that is authentic. This entails actively using robust feedback loops and allowing grantees and communities to interact openly without funder participation. It is common knowledge that candor can be muted if a funder is present.

Networks & Relationships: Shifting power dynamics requires philanthropies to be mindful about what networks they participate in to avoid the echo chamber trap. Inviting the full range of voices to the table for planning, program design and decision-making also alters the power dynamic.

Risk: Philanthropies seeking to integrate equity in all aspects of their Operating Archetype undertake intentional efforts to cede power by embracing risk and learning from failure. This not only enables innovative solutions to come to the fore but also allows for solutions to be driven by those closest to the issues and communities.

A thorough archetype analysis can enable funder to embed and center equity in their operating behavior because it illuminates existing strengths and assets, along with opportunities for growth. In turn, this can help funders become better positioned to shift inequitable power dynamics and address systems change.

Shifting Systems Self Diagnostic Tool

The set of diagnostic considerations below should help to clarify the degree to which a funder is systems-oriented in its giving and program planning. For each of the linked dozen statements, consider whether a given organization's staff and partners would agree, and how strongly. If the response tends to be "strongly agree", then the organization has likely embraced a systemic approach. Ambivalence in responses should not be discouraging, however, as seeing opportunities for change is the first step in implementing change.

1 A significant portion of our portfolio consist of multi-year grants that provide program partners with enough time to design for and create systems-level change.

Strongly Disagree	0	1	2	3	4	5	6	7	Strongly Agree

2 Once we agree with program partners on overall aims and activities, we allow them to use their funding flexibly so that they can adapt as needed without undertaking time-consuming revisions to individual line items in grant agreements and budgets.

Strongly Disagree	0	1	2	3	4	5	6	7	Strongly Agree

3 We adjust the length of our financial commitments to grantees to the timeframe needed to achieve meaningful impact.

| Strongly Disagree	0	1	2	3	4	5	6	7	Strongly Agree

TRUST-BASED PHILANTHROPY SELF-REFLECTION TOOL

This Trust-Based Philanthropy Self-Reflection Tool is designed to help funders at various stages of the trust-based journey examine how trust shows up across their organization, and identify areas that may need more inquiry, refinement, or deepening.

Values are a driving force in this tool because, as exhibited in the figure below, they permeate the culture, practices, structures, and leadership of an organization. In essence, values that are authentic, thoughtful, and clear throughout the organization may lead to a more trusting organization. While the tool is not geared towards organizations looking to define values, it names "illuminating whether you need to get clearer on your values, where you may need to be more intentional in aligning values to practices, or whether you need to spend more time fostering a shared understanding about your values internally" as an outcome.

By using a ranking system, the questionnaire dives into topics related to staff, board, and communities served alike. For example, one question asks users to rate the following statement: "Our executive staff is actively finding ways to share/cede power with program staff, grantees, and community partners." The questionnaire is not intended to judge or give prescriptive advice. Instead, it provides a snapshot of where the organization is now, which may lead to conversations about opportunities moving forward.
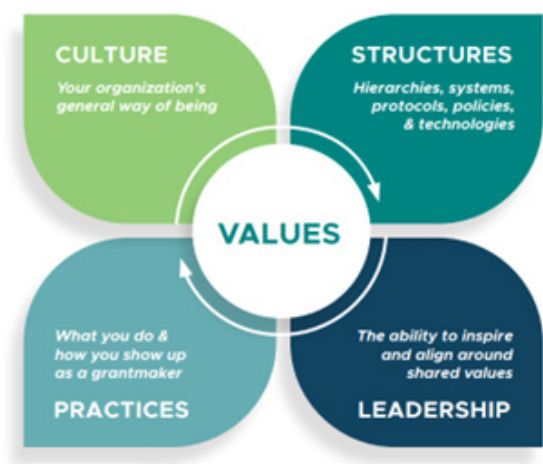
EQUITABLE EVALUATION TOOLS – A CULTURALLY RESPONSIVE AND RACIAL EQUITY LENS CHECKLIST

This is designed to help groups assess, learn from, and document their racial equity work, with special attention to issues of power and privilege in their efforts and in evaluation. In addition to reflecting on the current state of an organization's equity work, it also provides considerations and guidance for moving forward, helping groups contribute to making habits of evaluation, and making knowledge development, a routine part of a group or organization's work.

The graphic below can serve as a checklist for organizations that aren't sure if their evaluation process operates through a culturally responsive and racial equity lens.

The seven steps of the checklist provide guidance on both the evaluation team and its cultural competence, relationship to the community, and diverse makeup, along with the process of the evaluation itself.

Culturally Responsive & Racial Equity Lens

"Always place the people who are most impacted at the center of conversations which seek to find solutions to problems affecting them."

Assess diversity of team, service provider, and funder

Reflect on cultural competence of teams

Reach out to community leaders/agents

Ensure community voices are heard and valued

Examine institutional and inter-institutional aspects of structural racism

Understand racial historical legacy

Identify racial disparities

While the list of steps is not exhaustive, it includes important touchpoints to ensure those who are more impacted are at the center of critical conversations. Communities served are ingrained in each step of this process from the building of the team onward, which is important because it ensures that projects have an authentic lens, and that racial equity and cultural responsiveness are not an afterthought.

More resources for philanthropies getting started in this work are listed in the resources section at the end of this report. To share insights and learnings from these tools or to share questions for consideration, please email info@rockpa.org.

Concluding Reflections and a Call to Action

The impetus behind RPA's Power and Equity Workshop Series was to shift approaches amongst funders by providing a number of lenses and approaches for understanding and analyzing power dynamics in philanthropy and finding ways to upend decision-making structures and processes. As Series Speaker Chandria Jones noted, James Baldwin once said, "not everything that is faced can be changed, but nothing can be changed until it is faced." Attending a session from this series, reading this report, and reviewing additional resources in the appendix are all steps toward facing some of the deeply entrenched inequities within philanthropy.

Making the conscious decision to actually shift power to grantees and communities is the next challenge. As Stephanie Kimou stated, "philanthropy does not hold all of the solutions or all of the wisdom." The time is now to tap into the vast community wisdom. Based on insights and knowledge shared during the series, we have distilled below a number of recommendations, points for reflections and concrete calls to action to pursue equity and start ceding power.

Shift Internal Vision and Practices
- Embrace a vision of society based on global solidarity and distributed leadership
- Uplift and value the voices of people and organizations that have been historically marginalized, and under-resourced by the philanthropic sector
- Address the power imbalances between global and national organizations by funding, growing, and supporting Southern led networks and groups—who can then better engage, collaborate, and succeed together with allied Northern-led organizations in a global network
- Place value on infinite non-financial assets and equitable relationships as central drivers of change (like knowledge, trust, and networks)

- Support participatory engagement through memoranda of understanding (MOUs) and facilitated meetings
- Consider reducing or modifying reporting structures to decrease the burden on grantees

Foster a Culture of Learning, Growing and Experimenting

- Continue exploring the tools and resources introduced in this summary report and on your own.
- Mainstream external advisors for fresh and emergent perspectives on strategy development and next generation investments
- Implement a nominations network, or a long-term engagement with a network of diverse actors to support in expanding the pool of potential grantees.
- Open NFP processes as a standard to ensure those non-traditional grantees have access to funding opportunities
- Fund grantees without restriction

Invest in the Ecosystem and Collaboration

- Consider sharing this workshop report or your key takeaways from the reflection with your team or organization.
- Leverage collaboration as a means to spur new ideas and hold one another accountable.
- Create a working group on power and equity at your organization that can meet regularly or with an external consultant to discuss these themes and how they fit into your organization.

Embrace and Embed Equitable Evaluation and Impact Assessment Practices:

- Recruit a culturally competent evaluation team and add consultants with lived experience, as needed.
- Draft a multi-level systemic theory of change AND adjust as the initiative develops
- Use a multidisciplinary team to conduct mix of social research and systems-informed evaluation methods
- Use participatory impact measures that define success in sites' own terms with other indicators of progress
- Work with grantees to create relevant metrics of success that define impact on their terms

Of course, these changes won't happen overnight and may take months or even years to be fully implemented. However, small steps can be taken right away as a more complete process unfolds. Addressing one or two imbalances now, even if the step seems small, is a tangible way to act on your commitment to cede power.

To conclude, the insights, frameworks and roadmaps gathered in this report serve as an urgent call to action and a potential starting point for systems change funders looking to integrate more equitable practices and behaviors. Funders might want to explore the following questions not just internally but with their partners in the fields and contexts in which they work:

- How can we shift attitudes about sharing power, including understanding that it's not a zerosum game but a multiplier? What can we do so that the sharing of power be seen as less threatening?
- How might we continue to influence/educate leadership and board members on these issues and how important they are to the foundation's everyday work?
- How can funders get past the inherent power differential embedded in the source of their resources to build authentic and effective partnerships?
- How might we acknowledge with partners the power we hold and lift up the power they hold and meet to use that power towards equity for communities?
- How do we explain the importance of decolonizing philanthropy to new philanthropists?
- How do we encourage other philanthropist to make these shifts too?

We hope our continued interrogation of this important topic contributes to better equipping philanthropy to shift the power, in order to shift entrenched practices and systems.

## ADDITIONAL POWER AND EQUITY RESOURCES:

- Climate Justice Alliance Series

- Community Driven Systems Change (Firelight)

- Considerations for Conducting Evaluation Using a Culturally Responsive and Racial Equity

- Continuing the Journey to Reposition Culture and Cultural Context in Evaluation Theory and Practice edited by Stafford Hood, Rodney Hopson, Henry Frierson

- CREA Resources

- Equitable Evaluation

- Is my Evaluation Practice Culturally Responsive?

- Participatory Data Analysis

- Racial Equity Tools

- Skeptic's Corner. FAQ's About Trust-Based Philanthropy by Trust-Based Philanthropy Project.

- Some Lessons from Participatory Grantmaking and Meditations on Power for the Field (Fund for Shared Insight)

- Unicorns Unite: How Nonprofits & Foundations Can Build EPIC Partnerships by Jessamyn Shams-Lau, Jane Leu, Vu Le
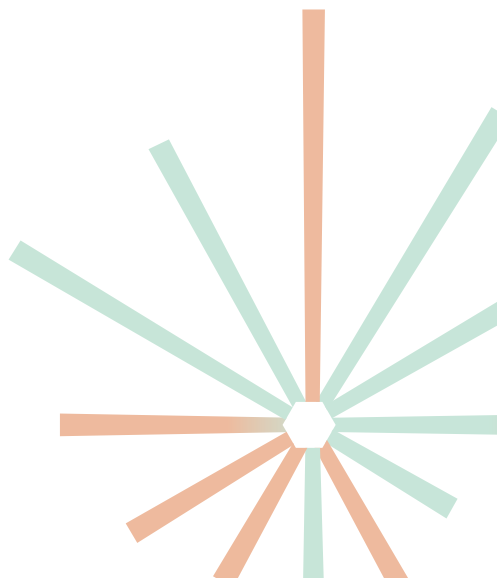
Endnotes

¹ VeneKlasen, L. and V. Miller. "Chapter 3: Power and Empowerment," in A New Weave of Power, People & Politics, 39-58. Practical Action Publishing, 2007. and Fox, K. and M. Post. "Evaluating Power Building: Concepts and Considerations for Advocacy Evaluators." New Directions for Evaluation 2021 no. 171: 59-70.

² Hargreaves, M. Power and Equity Workshop Series. Personal Notes. Rockefeller Philanthropy. 2022.
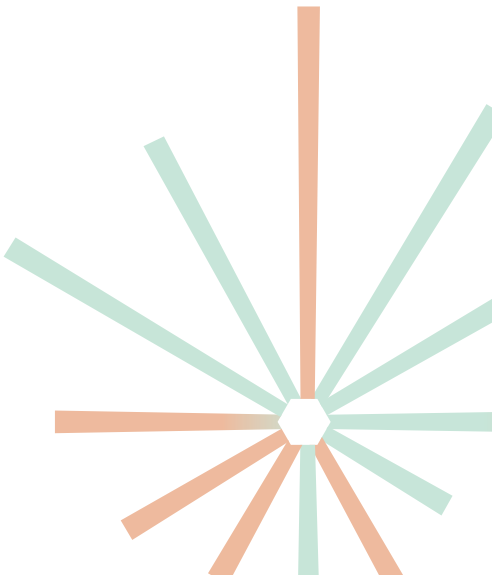
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