

Insights from Hewlett Foundation's Performing Arts OE-EID Grants

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Community
Wealth Partners

by **SHARE OUR STRENGTH**

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Introduction

In 2019, the William and Flora Hewlett Foundation Performing Arts Program, in collaboration with a community advisory council, awarded a round of 39 grants to support Bay Area performing arts organizations in building their capacity around equity, inclusion, and diversity (referred to as the Organizational Effectiveness - Equity, Inclusion and Diversity or OE-EID grants) through a participatory grantmaking process.

To reflect on this round of grants, the Performing Arts Program engaged Community Wealth Partners to conduct an assessment. The assessment process engaged a group of 10 leaders whose organizations had received an OE-EID grant as a grantee learning team to make meaning of data from grant reports and develop recommendations for the foundation based on the data and their own experiences. The Performing Arts Program and Community Wealth Partners chose this approach because it would focus on the perspectives of grantees, yield more detailed information about grantees' experiences than what was included in the grant reports, and create an opportunity for two-way conversation between the Performing Arts Program and grantees about promising practices and implications for the future.

The objectives of the grantee learning team were to:

- Reach a shared understanding among the grantee learning team and Performing Arts program staff of the outcomes of the 2019 OE-EID grants through a participatory meaning-making process, and
- Develop insights about grantees' experiences and recommendations for the Hewlett Foundation to consider in future grantmaking.

Grantee Learning Team

1. Terri Le, Oakland Asian Cultural Center
2. Shafer Mazow, Z Space
3. Tom McKenzie, LA County Department of Arts and Culture
4. Keytra Meyer, Humboldt Area Foundation
5. Nancy Ng, Luna Dance Institute
6. Chike Nwoffiah, Oriki Arts
7. Krista Smith, Queer Cultural Center
8. Emma Tramosch, La Pocha Nostra
9. Sarah Williams, California Shakespeare Theater
10. Anne Younan, City Lights Theater Company of San Jose

To form the grantee learning team, the Performing Arts Program staff sent invitations to a group of 2019 OE-EID grantees, 10 of whom opted to apply. All applicants were selected to participate and paid an honorarium to recognize their expertise.

Community Wealth Partners reviewed the grant reports and provided the grantee learning team a summary and analysis of data from grant reports that had been submitted as of January 2022. This summary served as the basis of a series of discussions among the grantee learning team to make meaning of the data, reflect on their own experience, and provide deeper exploration of patterns and themes that emerged from the

grant reports.

This document shares quantitative findings from a review of 26 final grant reports¹ (from the 39 grants made) as well as insights and recommendations that came out of the work of the grantee learning team.

¹ Many of the OE-EID grant projects, which were awarded in May 2019, were significantly delayed by the pandemic, so much so that in early 2022, only 26 of 39 grant reports had been submitted. The remaining projects were not completed, though most were anticipated to conclude by December 2022.

Defining Terms

To ensure the group was using shared language, the grantee learning team used the following definitions for terms often used in OE-EID grant reports and discussions. Community Wealth Partners and the grantee learning team developed these working definitions by looking at outside sources (referenced below) and collaborating in a shared document. These definitions are not necessarily the official definitions of organizations represented in the grantee learning team or the Hewlett Foundation.

In this report, the authors use the term “Organizational Effectiveness – Equity, Inclusion, and Diversity (OE-EID)” because that is the title agreed upon Performing Arts Program staff and the community advisory council that was part of the participatory grantmaking process. The Hewlett Foundation typically uses “diversity, equity, and inclusion,” or “DEI,” to describe its internal and external efforts on these topics. Thus, this document uses the acronym DEI in reference to efforts from other parts of the foundation and more broadly.

Equity — all groups have access to resources and opportunities so that disparities in opportunities and access to resources are removed

Diversity — each individual is unique and groups of individuals reflect multiple dimensions of difference

Inclusion — a value and practice of ensuring that people feel they belong

White supremacy — a historically based, institutionally perpetuated system of exploitation and oppression of continents, nations and people of color by white peoples and nations for the purpose of maintaining and defending a system of wealth, power and privilege

Systemic/structural racism — a system in which public policies, institutional practices, cultural representations and other norms work in various, often reinforcing ways to perpetuate racial group oppression and inequity

Anti-racism — the process or conditions that actively identify and oppose racism

Racial equity — condition that would be achieved if one’s racial identity no longer predicted, in a statistical sense, how one fares

Intersectionality — classifications such as gender, race, class and others cannot be examined in isolation of one another; they interact and intersect in lives, society and systems

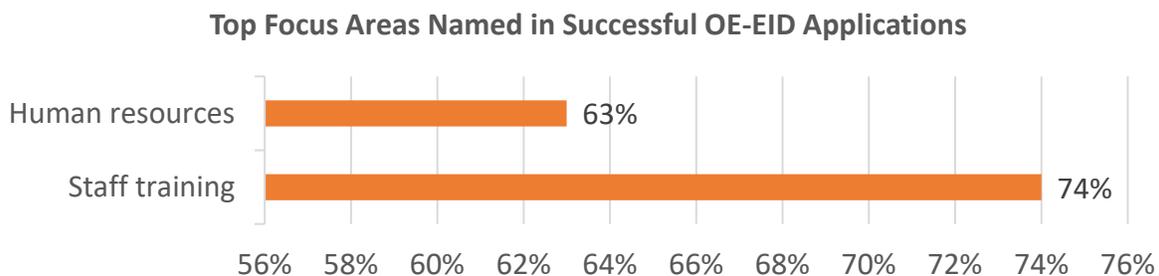
Allyship — an active, consistent, and arduous practice of unlearning and re-evaluating, in which a person in a position of privilege and power seeks to operate in solidarity with a marginalized group

Sources that informed definitions: <https://aninjusticemaq.com/the-differences-between-allies-accomplices-co-conspirators-may-surprise-you-d3fc7fe29c>, <https://theantioppressionnetwork.com/allyship/>, <https://interactioninstitute.org>

Performing Arts OE-EID Grantmaking in 2019

In May 2019, the Performing Arts team awarded **\$1.75 million in grants to 39 nonprofits** for Organizational Effectiveness - Equity, Inclusion and Diversity (OE-EID) projects.² The timeframe for grantees to undertake the projects was initially 12 to 18 months. To allow greater flexibility during the pandemic, in 2020 the Performing Arts Program gave all grantees an automatic 6-month extension, and many grantees received additional extensions at their request.

To identify themes in how grantees planned to use grant funding, Community Wealth Partners reviewed 26 grant reports and coded the activities grantees named as their planned activities in the reports using a taxonomy developed by the Hewlett Foundation Effective Philanthropy Group (EPG) in 2019. Performing Arts OE-EID grantees named two top focus areas in their planned activities for grant funding. Some grants named more than one focus area. Most frequently (74%), grantees planned to use the funds to support staff training, which includes activities that build staff knowledge and skills to apply internally or externally. The second most frequently named focus area was human resources (63%), which includes activities around staff recruitment and retention, internal HR policies, and succession planning.



One focus area that grantees described and was not captured in the taxonomy developed by EPG was activities to facilitate rest and healing for their staff. This was a focus area for five organizations that had been doing internal EID work for several years or were founded with and continue to steward EID values in all they do. Sustaining EID in all aspects of an organization can be challenging and draining. These applicants recognized the importance of rest and healing to help staff recuperate from the constant and demanding nature of EID work. For these organizations, building their capacity for EID work meant creating space for rest and restoration for staff, or facilitating healing within an organization or community.

In the 26 final grant reports we reviewed, grantees most frequently cited three types of outcomes:

- Increased awareness of how a focus on EID connects to the organization's mission (52%)
- Strengthened staff capacity in service of building a more inclusive organizational culture (48%)
- Changes to HR practices and the organizational culture (41%)

The Performing Arts Program also asked OE-EID grantees to rate themselves on a Continuum on Becoming an Anti-Biased Multicultural Organization (see Appendix A), both at the time of grant application and when submitting the final grant report. (This request was unique to Performing Arts grant applications, and not something the foundation's other programs required.) Gathering this information can help show how grantees were thinking about their EID work, both before the grant project and after it concluded. The team asked applicants to share what stage they saw their

² These grants were separate from other capacity building or OE grants that the Performing Arts Program makes. In addition to OE grants awarded, in 2019 the Performing Arts Program awarded a round of OE-EID grants specifically focused on building grantees internal capacity for equity, inclusion, and diversity.

organizations along the continuum, reflect on their organization's understanding of EID; organizational culture; policies; and practices. Lower assessment scores (1-3) indicate exclusionary practices or policies, limited acceptance of difference, and little awareness of patterns of privilege. Higher scores (4-6) indicate a growing understanding of equity, inclusion, and diversity, to a fully inclusive and anti-biased organization.

Of the 21 organizations that provided ratings both in their proposal and in their final grant report, **the average movement along the continuum was from 4.1 to 4.6.** This movement may be indicative of two things. First, it could indicate that most grantees were already showing some knowledge and practice related to becoming an anti-biased, multicultural organization, and the work of the grants seems to have helped deepen their understanding and practice. Second, it could indicate that through the work they did, grantees may have learned that they had more work to do than originally anticipated. The latter is evident in grant report narratives, where some grantees named that as they learned more about policies, practices, culture, and norms to be more equitable and inclusive, they realized they were not as far along on the continuum as they initially thought.

LEARNING THEMES

Grant reports and conversations among the grantee learning team surfaced five key learnings. These learnings could inform future grantmaking from the Hewlett Foundation and other funders' approaches to building DEI capacity for other organizations as well.

- 1. DEI work is complex and ongoing. Flexible and long-term funding are key.**
- 2. DEI work needs to happen simultaneously at individual and organization levels.**
- 3. It is important for organizations to be explicit about centering race AND take an intersectional lens.**
- 4. Funders can address historical inequities in support to BIPOC and LGBTQ+ organizations with bold, immediate and substantial funding**
- 5. There are opportunities for collective action, continued learning and sharing among nonprofits and funders.**

We explore each of these themes in greater depth below.

1. DEI work is complex and ongoing. Flexible and long-term funding are key.

Advancing equity inside organizations is iterative work. In grant reports, many grantees shared that the work evolved differently and took longer than they initially anticipated. Grantee learning team

“This work is ongoing. It’s not done in one grant cycle. We are working to dismantle practices while still existing in a system rooted in white supremacy. The need for long-term funding and flexibility is critical.”

-- grantee learning team member

members also named the challenge of having to work through a lot of ambiguity while they are rethinking practices, policies, and assumptions because there is no clear roadmap for what the final destination will be. They may be letting go of policies and practices that were standing in the way of equity and inclusion and working to imagine new ways of working. At the same time, they must continue to operate in a larger ecosystem, which requires them to continue to deliver programs, meet funders' requirements, and manage

personnel. Balancing transformational change while also keeping up with day-to-day demands can be challenging.

For 2019 OE-EID grantees, the pandemic presented added challenges. As performing arts organizations adapted their programming and operations to try to stay afloat during shelter-in-place orders, they also had to adapt their plans for equity work. Organizations reported shifts such as moving team retreats and trainings from in-person to virtual formats, adjusting timeframes, and narrowing the focus of their work.

“We could not have imagined then how much this work would need to alter over the course of the grant period and, at the same time, how our commitment to anti-racism would become the very core of every aspect of our work.”

-- grantee final report

Hewlett provided grantees flexibility in terms of both the timeline for the projects and how the funds could be spent, so long as it was still for EID-focused work.

Because this was the first time the Performing Arts Program awarded a cluster of OE-EID grants, it did not waive the reporting requirement for grantees. Grantee learning team members appreciated the flexibility and advocated for continued long-term funding from Hewlett and other funders to help grantee organizations ensure they can prioritize EID work year after year.

2. DEI work needs to happen simultaneously at individual and organization levels.

Grant reports and grantee learning team conversations expressed a desire to be able to better understand where *individuals* are in their EID learning, support individuals' personal growth, and at the same time develop a shared sense of how and where the *organization* must grow. Supporting individuals' growth and development as well as organizational growth and change is important for maintaining forward momentum. Tools and supports that helped grantees with this dual purpose included individual coaching for board and staff, use of racial affinity groups, individual and organizational assessments, and working with consultants—though learning team members shared mixed experiences with consultants and said they had better experiences working with consultants who were closely connected with the communities their organizations work with.

Balancing individual and collective work is also important when considering the work of the staff and the board. Many 2019 grantees included work with the board in their OE-EID grant projects. For organizations who did work with their boards, a common theme was recognizing that often the board and staff are in different places when it comes to their understanding and experiences of EID. In most cases, organizations reported the staff being farther along than the board in understanding equity, inclusion, and diversity and how it connects to the organization's mission and work.

“We learned that this is work that has to be integrated into everything we do as a core value, not an add-on.”

-- grantee final report

While grantee learning team members saw value in supporting board growth and development around EID, they also challenged many current assumptions around nonprofit governance. Like many other structures in our society, nonprofit board structures typically hold white supremacist norms. For example, a common practice to require 100 percent giving among board members, which is prioritizes those with the financial resources to contribute above those with other contributions but who lack the financial means to support the organization. Organizations committed to advancing EID could challenge some of those norms and help reimagine nonprofit governance that prioritizes equity and inclusion.

While the work that happens with the board often looks different than the work that happens with staff, these streams of work ultimately need to be aligned so the organization can evolve, and so the resulting changes endure beyond board and staff transitions. As one learning team member put it, “EID capacity needs to be built into the muscle memory of the institution, its practices, culture, and rituals.”

Finally, 2019 grantees identified that creating space for rest and healing is also important for moving forward in EID work, and Hewlett supported rest and healing efforts for a five grantees. Rest and healing is important at both the individual level and the organization level. Learning team members appreciated the flexibility Hewlett provided in allowing OE-EID funds to be used for activities other than trainings, assessments, or work with consultants. Some 2019 grantees used funding for healing at the organizational level through activities like healing circles for staff and their community. Others supported individual healing by, for example, allowing time off for staff to rest and recharge so they can return with a renewed commitment EID in their organization.

3. It is important for organizations to be explicit about centering race AND take an intersectional lens.

Data show that race is the biggest driver of disparities across a range of outcomes, so it is important to take a race-specific lens. As a result of the racial reckoning following George Floyd's murder in 2020, many 2019 grantees made this realization and moved from a broad EID lens to a more intentional focus on racial equity. While the grantee learning team saw, in looking at a synthesis of

grant reports, this as a positive shift overall, for some it was also disheartening to recognize that many of their peers were not already prioritizing racial equity.

“What I’ve consistently seen in funding for LGBTQ+ organizations is that the white-led LGBTQ+ organizations consistently receive more funding than those with BIPOC leadership.”

-- grantee learning team member

The grantee learning team spent a lot of time discussing intersectionality. When organizations are taking an intersectional lens, the grantee learning team recommended they be clear about how race intersects with other identities and be explicit about the desired changes. In addition, some organizations created to serve specific identity groups, such as Latino or LGBTQ+ people, have been working to

understand what allyship can look like for them. For example, a group serving Asian-American communities might ask how they can be allies to the Black community, and this could be beneficial to many communities.

4. Funders can address historical inequities in support to BIPOC and LGBTQ+ organizations with bold, immediate, and substantial funding.

There is a history of inequitable funding for organizations led by people with marginalized identities (e.g., Black, Indigenous, POC, and LGBTQ+.) that has put organizations led by people with dominant identities (ie., primarily white identities in the United States) at an advantage. The grantee learning team felt that recognizing this pattern creates opportunities for Hewlett Foundation and other funders to develop strategies that can help address funding inequities.³

“Through the harm that has accumulated for hundreds of years [funders] have put [BIPOC-led organizations] at a disadvantage. And now [BIPOC-led organizations] don’t have endowments and don’t have the luxury of staff vacations. Begin bold actions from there.”

-- grantee learning team member

It is important for funders to support organizations that have traditionally held privilege in their work to advance. At the same time, some current funding practices continue to perpetuate inequities for smaller organizations led by people with marginalized identities, many of which have been doing DEI work without dedicated funding to support it for years. Acknowledging the harm that has been caused by years of funding inequities is a necessary step required for healing. Grantee learning team members said now is the moment for funders (including but not

limited to Hewlett) to give greater support to organizations led by people with marginalized identities that have been historically underfunded.

Learning team members also discussed different opportunities for shifting power within and among organizations. They named a need for more longstanding white leaders to step aside and not just share but *cede* power to BIPOC leaders. They also named a need for all nonprofit leaders to move beyond hierarchical notions of power that are common among nonprofits to *disrupt* how power is wielded in the sector (e.g., shared leadership, collective action across organizations). There could be opportunities for Hewlett and other funders to support grantees in evolving leadership structures and practices.

³ As an example of what this could look like, ABFE, a philanthropic Partnership for Black Communities has created a framework for [Responsive Philanthropy in Black Communities](#) that lays out grantmaking practices that can help reduce gaps in racial disparities Black Americans face.

5. There are opportunities for collective action, continued learning, and sharing among nonprofits and funders.

Grant reports and grantee learning team discussions also surfaced some insights for the Hewlett Foundation to consider in future rounds of grantmaking. These recommendations could be relevant to other funders as well.

First, because they were grappling with similar questions and turning to the same consultants and tools to help with these questions, grantees saw opportunities to pool resources for things like shared learning experiences or shared consulting. Grantees saw an opportunity for Hewlett to connect grantees who are grappling with the same questions or working with the same consultants so they can learn from one another and possibly explore working together.

Participants in the grantee learning group found value in being able to come together and learn from one another. They found it helpful to learn what EID work has looked like in other organizations and to have peers to talk to about common challenges. They expressed interest in a continued space for focused peer learning and connection, and saw a possibility for Hewlett to use its convening power to help facilitate healing within and across organizations.

Finally, grantees named an opportunity for the Hewlett Foundation to leverage its voice to advocate to other funders for changes in practice and for more support for EID work. For many grantees, Hewlett is their only funder to offer OE-EID support (or capacity-building support of any kind), so there is an opportunity for Hewlett to help push for change among their peers.

“[Decolonizing Wealth](#) talks about using money as medicine—as a way to connect and heal people. I encourage Hewlett to think about using their money in that way.”
-- grantee learning team member

CONCLUSION

OE-EID grantees appreciated the funding from Hewlett to advance EID inside their organizations. They appreciated the flexibility to use grant funds as they saw fit as projects evolved. In addition, members of the grantee learning team found value in having space to connect with and learn from peers.

As the Performing Arts Program considers future funding for OE-EID, the following recommendations emerged from grant reports and the learning team:

- **Continue to be flexible with funding while also sharing your knowledge.** Grantees appreciate that the Hewlett Foundation is not a “hands-on” or prescriptive grantmaker. At the same time, Hewlett staff have knowledge from previous grantmaking experience and a bird’s-eye view of what’s happening across organizations that could be helpful to grantees, particularly as they consider how to structure their OE-EID work. Consider finding ways to share insights and foster connections among grantees.
- **Continue to offer space for peer connection and learning.** One suggestion of what this might look like was holding space for grantees to come together during the time grantees are considering applying for funding and writing proposals, so they can share with each other how they are thinking about approaching the work, learn from other’s approaches, and explore opportunities for collaboration.
- **Be intentional around who you want to support with OE-EID funding and the changes you want to see.** To what extent does the foundation want to devote resources to organizations that have historically held more power and resources and are beginning work to become more equitable compared to organizations who have been doing EID work for years and have not historically had access to resources? There is a need for support for both types of organizations, but the approaches and outcomes will look different. In addition, the Performing Arts Program could consider whether future funding will prioritize organizations working specifically on racial equity—since many organizations evolved to take a race-specific lens—or whether it will continue to stay open to approaches to advance EID without a central focus on race.
- **Wield your power to advocate for broader changes that would benefit grantees.** Hewlett could leverage its influence in the field to advocate for changes in grantmaking practices and more resources to support EID work.

With continued support for OE-EID work among grantees and a continued spirit of learning and partnership, the Hewlett Foundation and the organizations it funds together can continue to contribute to a more equitable, inclusive, and diverse performing arts sector in the Bay Area.

Appendix A

Continuum on Becoming an Anti-Biased, Multicultural Institution

This continuum was created by Crossroads Ministry, adapted from its original form created by Baily Jackson and Rita Hardiman. It was further developed by Andrea Avazian and Ronice Branding, and modified for the arts and culture sector as part of an Americans for the Arts “Engaging Bias” session led by Tatiana Hernandez, Charlie Jensen, and Kirstin Wiegmann.

Members of the OE-EID Community Advisory Council recommended the continuum to the Performing Arts Team. As part of the 2019 OE-EID application process, the Performing Arts team asked OE-EID grant applicants to share what stage they saw themselves in the continuum reflecting on their organization’s understanding of diversity, equity, and inclusion; organizational culture, policies, and practices. Lower organizational-assessment scores (1-3) indicate exclusionary practices or policies, limited acceptance of difference, and little awareness of patterns of privilege. Higher scores (4-6) indicate a growing understanding of EID, to a fully inclusive and anti-biased organization, allied with others combatting oppression.

Continuum on Becoming an Anti-Biased, Multicultural Institution

MONOCULTURAL		MULTICULTURAL		ANTI-BIASED		ANTI-BIASED MULTICULTURAL	
Differences Seen as Defects		Tolerant of Differences		Differences Seen as Assets			
1. Exclusive A Segregated Institution	2. Passive A "Club" Institution	3. Symbolic Change A Multicultural Institution	4. Identity Change An Anti-Biased Institution	5. Structural Change A Transforming Institution	6. Fully Inclusive A Transformed Institution in a Transformed Society		
<ul style="list-style-type: none"> Intentionally and publicly excludes or segregates a group of people Intentionally and publicly enforces the status quo throughout institution Usually has similar intentional policies and practices toward other socially oppressed groups, such as women, disabled, elderly and children, lesbians and gays, Third World citizens, etc. Institutionalization of bias includes formal policies and practices, teachings, and decision-making on all levels. 	<ul style="list-style-type: none"> Tolerant of a limited number of a marginalized group if they have "proper" perspective and credentials May still secretly limit or exclude members of marginalized groups in contradiction to public policies Continues to intentionally maintain established power and privilege through its formal policies and practices, teachings and decision-making on all levels of institutional life Often declares, "We don't have a problem." 	<ul style="list-style-type: none"> Makes official policy pronouncements regarding inclusion Sees itself as "non-biased" institution with open doors to all people Carries out intentional inclusiveness efforts, recruiting "representative people" on committees or office staff Expanding view of diversity includes other socially oppressed groups, such as women, disabled, elderly and children, lesbians and gays, Third World citizens, etc. <p>But . . .</p> <ul style="list-style-type: none"> "Not those who make waves" Little or no contextual change in culture, policies and decision-making Is still relatively unaware of continuing patterns of privilege, paternalism and control 	<ul style="list-style-type: none"> Growing understanding of bias as barrier to effective inclusion Develops analysis of systemic bias Sponsors programs of anti-bias training New consciousness of institutionalized power and privilege Develops intentional identity as an "anti-biased" institution Begins to develop accountability to oppressed communities Increasing commitment to dismantle bias and eliminate inherent privilege <p>But . . .</p> <ul style="list-style-type: none"> Institutional structures and culture that maintain power and privilege intact and relatively untouched 	<ul style="list-style-type: none"> Commits to process of intentional institutional restructuring, based on anti-biased analysis and identity Audits and restructures all aspects of institutional life to ensure full participation of all people, including their worldview, culture and lifestyles Implements structures, policies and practices with inclusive decision-making and other forms of power sharing on all levels of the institution's life and work Commits to struggle to dismantle bias in the wider community, and builds clear lines of accountability to oppressed communities Anti-biased multicultural diversity becomes an institutionalized asset Redefines and rebuilds all relationships and activities in society, based on anti-biased commitments 	<ul style="list-style-type: none"> Future vision of an institution and wider community that has overcome systemic bias Institution's life reflects full participation and shared power with diverse racial, cultural and economic groups in determining its mission, structure, constituency, policies and practices Full participation in decisions that shape the institution, and inclusion of diverse cultures, lifestyles and interests A sense of restored community and mutual caring Allies with others in combating all forms of social oppression 	<p>© By Crossroads Ministry. Adapted from original concept by Baily Jackson and Rita Hardiman, and further developed by Andrea Avazian and Ronice Branding.</p> <p>Adapted for the Americans for the Arts "Engaging Bias" session by Tatiana Hernandez, Charlie Jensen and Kirstin Wiegmann.</p>	

May 2014

Appendix B

Feedback from Grantee Learning Team to Consider for Future Grantmaking Processes

In addition to the insights and recommendations outlined in this report, the grantee learning team discussed suggestions the Hewlett Foundation could consider for future grantmaking RFP processes.

- **Give adequate time between the release of the RFP and the deadline for proposals.** Grantees recommended a period of 6-8 weeks to give organizations time for internal conversations, scoping, and possibly connecting with potential partners. They also suggested letting organizations know the RFP will be coming as soon as the program has decided that it will release an RFP so nonprofits can begin to think about what they might propose.
- **Continue to offer grantees flexibility and autonomy in determining how they'd like to use grant funding.** Grantees appreciate the flexibility the Hewlett Foundation has provided, including the added clarity that organizations don't have to work with consultants and that supporting rest and healing is an acceptable use of grant funding. They encouraged Hewlett to continue to communicate this flexibility.
- **Offer connections and knowledge to help grantees imagine creative approaches for using grant funding.** While grantees appreciate flexibility and autonomy, they'd also appreciate access to connections and knowledge that might help them shape their proposals. Suggestions included sharing insights from this review of 2019 grant reports, providing space for grant applicants to bounce ideas off each other while they are working on their proposals, and connecting grantees to one another when Hewlett notices they are working on similar things or grappling with similar questions.
- **Reduce the burden on grant applicants.** Nonprofit leaders report spending too much time working to meet funders' application and reporting requirements. All funders can look for ways to simplify their processes and requirements so that nonprofit leaders can spend less time on fundraising and more time delivering on their missions. For example, in the event that the foundation might offer renewable OE-EID grants, consider combining the grant report and renewal application into one step for organizations seeking continued funding. (The Performing Arts Program already follows this practice with core, renewing, non-OE grants.)

Appendix C

Highlights of Grantee Learning Team Design and Facilitation

Grantee learning team members found value in having time and space to come together with peers for shared learning and support. They recommended Hewlett continue to convene grantees for peer-to-peer support. Learning team members lifted up the following elements from the design and facilitation of this group as factors that supported connection and learning.

Community agreements. At the start of the work, facilitators proposed a set of agreements for how the group would show up together, which the group then iterated on together. The resulting agreements for the grantee learning team were as follows:

- Address harm in the moment (participants will speak up when something hurts and apologize if they cause hurt and/or facilitators will interrupt and name)
- Speak from I – speak to your experience v. generalizing
- Honor multiple truths
- Wield your power in kindness and rigor (be bold)
- Focus on celebration/joy
- Share reactions of affirmation - applause hands / snaps / reactions

Combining large groups, small groups, and 1:1 spaces. Community Wealth Partners paired learning team members with others in similar roles in their organizations for 1:1 interviews before the first full group meeting. The interviews provided space for grantee learning team members to begin to build relationships with one other person and begin to make meaning of the synthesis of grant report data. The facilitators found this helped build connection among the group — especially because the experience was virtual. Learning team members entered the full group conversation feeling like they knew at least one person in the group and primed for the conversation because they'd already begun thinking about the issues the full group would be discussing. During full group meetings, Community Wealth Partners balanced time in the agendas between small group and full group discussions to help ensure everyone had space to contribute while also making sure there was alignment across the full group about key insights and recommendations for Hewlett.

Balancing focus and flexibility in facilitation. The facilitators worked to ensure the group's time together balanced a focus on the final deliverable to the Hewlett Foundation — a set of insights and recommendations — and space for learning and support for grantee learning team members. The group identified and prioritized targeted learning questions (see below) that they explored in-depth during meetings. These discussions contributed to the insights and recommendations presented to the Hewlett team (in a meeting between the Performing Arts team and the grantee learning team and via this report). Facilitators also held open space for learning team members to explore topics that were top-of-mind for them so they could access the knowledge and support of their peers.

Grantee Learning Team Discussion Questions

These questions were crowdsourced from the grantee learning team in the 1-1 interviews and during the first full-group meeting. Some questions focused on specific lessons from grantees' experience and recommendations the grantee learning team might offer to Hewlett, and some questions were more general about practices that could help advance EID. The questions served as a guide for determining what topics the group discussed in more detail during their meetings together.

Specific questions about Hewlett and OE-EID grants

- Grant reports showed that nearly everyone shifted their grant approach. What were the pivots organizations made and why? And what were the outcomes of those pivots?
- When organizations have made policy changes in service of EID, what has that looked like?
- How might the Hewlett Foundation encourage other funders to provide this type of funding?
- Where might there be opportunities to support collaborative, collective work among grantees?

General questions

- How do we disentangle organizational practices to become more equitable and inclusive while also needing to be accountable to things like the organization's finances?
- What does it look like to promote strong allyship?
- How do we productively manage conflict that arises when doing EID work with teams?
- How do you balance supporting individual EID work with moving the organization along and creating shared understanding of where an organization is in its EID work?
- How do we maintain focus on EID work while at the same time ramping up productions again?
- What does it look like to cede power to people of color and leaders working directly with communities of color?
- How are we creating space for healing?